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DISCUSSION PAPER 7

Employment in Retail Sector:
A comparison of unorganized and organized retail in India

Shaoni Shabnam

Bino Paul G.D

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**TATA INSTITUTE OF SOCIAL SCIENCES,
DEONAR, MUMBAI 400 088**

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Shaoni Shabnam.
Bino Paul G.D

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Summary

Retail is currently the booming sector of the Indian economy. This trend is expected to continue for at least the next two-three decades, attracting huge attention from all quarters of the economy—entrepreneurs, business heads, investors as well as real estate owners and builders. Retail sector is also expected to create huge employment as it will expand across the country at a massive scale. Slowly and steadily retail has witnessed considerable growth while a new form of organized retail sector has emerged within the retail industry. With such developments in the retail it is important to look at the labour market in this sector. Since this is a hugely under-researched area, the study attempts to firstly understand and conceptualize labour as it is perceived by both unorganized and organized forms of retailing. In addition the study looks at the labour management practices, the labour problems, as well as the problems faced by the employees in organized vs. unorganized retailing in India. The rationale of the study is twofold: *First*, to examine the *nature of changes* in the retail sector taking place due to organized form of retailing and *implications* of shift to this new form of retailing. *Secondly*, this area has remained largely an unexplored part of research till date specially in the Indian context. The broad objective of the study is to understand the differences in the retail sector employment through a comparison of unorganized and organized forms of retailing and its implications on the labour market in India. The study uses primary data collected through in depth qualitative analysis following a case study method. The cases include 1) Palm Beach Galleria, a shopping mall and 2) Chembur market, a traditional market area, both located in Mumbai, to represent organized and unorganized retails sectors respectively.

Key words:

Organized and unorganized retail, labour management practices, labour problems

1 Introduction

Retail is currently the booming sector of the Indian economy. This trend is expected to continue uninterrupted for at least the next two-three decades, attracting huge attention from all quarters of the economy -entrepreneurs, business heads, investors as well as real estate owners and builders-. Retail sector is also expected to create huge employment as it will expand across the country at a massive scale. The reasons for this expansion of retail is evidently related to the liberalization and opening up of the Indian economy which had immense effects on the consumer demand, tastes and preferences as well as the buying capacities of the Indians (specially the growing middle class) over the past few years. Slowly and steadily retail has witnessed considerable growth while a new form of organized retail sector has emerged within the retail industry. Stated simply, it refers to the organized retail chains managed by big corporate houses such as the Pantaloons group, K. Raheja group, the Piramals and so on. These are modeled on American forms of organized retail chains such as Walmart, one of the largest in the world.

With such developments in the retail it is important to look at the labour market in this sector. Since this is a relatively under-researched area, attempts have been made to understand and conceptualize labour as it is perceived by both unorganized and organized forms of retailing. In addition, the study looks at the labour management practices, the labour problems, as well as the problems faced by the employees in organized vs. unorganized retailing in India. Considering the scale of expansion of the retail sector and the focused attention being given to organized form of retailing in the recent years, it is important to look at this sector in depth. The rationale of the present study is twofold:

First, it is important to examine the *nature of changes* in the retail sector taking place due to organized form of retailing and *implications* of shift to this new form of retailing.

Secondly, this area has remained largely an unexplored part of research till date specially in the Indian context. The broad objective is: to understand the differences in the retail sector employment through a comparison of unorganized and organized forms of retailing and its implications on the labour market in India.

The next section gives a brief overview of the Indian retail scenario, specially focusing on the new organized retail: its growth, reasons for success and issues concerning its growth. This section also gives a macro picture of employment in retail sector. Section three presents case study of one organized retail outlet and one unorganized outlet, covering both the employers and employees. Finally, the concluding section aims to provide policy suggestions concerning the current status of labour market in Indian retail sector.

2 Overview of Retail Sector

Retail has played a major role world over in increasing productivity across a wide range of consumer goods and services .The impact can be best seen in countries like United States of America (U.S.A.), United Kingdom (U.K.), Mexico, Thailand and more recently China. Retail is one of the largest industries in the world. It is the second-largest industry in the United States both in number of establishments and number of employees. The retail industry employs more than 22 million Americans and generates more than \$3 trillion in retail sale annually. Wal-Mart is the world's largest retailer. It is also the world's largest employer with over 1million associates. Wal-Mart has become the most successful retail brand in the world due its claimed ability to leverage size, market clout, and efficiency to create market dominance (CII Report, 2006).

2.1 Salient Features of Indian Organized Retail

Retail market in India is expected to grow from US \$350 billion to US \$427 billion by 2010.¹ Retail has traditionally been a major sector in India employing millions of people. Retailing currently contributes 10% of India's GDP and 6-7% of employment (Kalhan, 2007). The popular traditional form of retail has been the so-called 'unorganized' form of retailing mostly represented by small family-owned stores, selling one particular category of product, e.g Kirana shops, drug stores, located in the market place or residential areas, road-side stalls, hand-cart and pavement vendors etc. However with the opening up of the

¹ Economic Times, Oct. 18, 2007

Indian economy since 1991 retail sector has gradually undergone considerable changes in its form. Though earlier mainly represented by the low-cost 'mom-and-pop' store format, retail today is emerging has a huge "industry". The major shift has been the emergence of an organized sector within the retail industry.

In common parlance organized sector usually denotes unionization. However, in the Indian context organized sector is differentiated from unorganized sector in terms of employment status. The former offers regular contractual hired employment along with social security benefits and hence implies better service conditions for its employees as opposed to their counterparts in the unorganized sector. Retail in India used to fall largely into the unorganized category. However, recently there has been the emergence of organized sector within retail.

Though organized retail currently forms a very miniscule proportion of the entire retail sector in India (around 3%), by 2010 it is expected to be expanding at a considerable rate (compound annual growth of 40%). According to a report released by FICCI (Federation of Indian Chambers of Commerce and Industry), the organized retail is likely to increase its share to over 20% by 2010.² Organized retail occupied a space of 1 million sq. ft. in 2002, which shot up to nearly 14 million sq. ft. by 2007 and in 2008 the figure is expected to be 16 million sq.ft. India Retail Report, 2007 forecasts that 2.2 million jobs will be created in this new retail sector by 2010.

Many Indian entrepreneurs have taken a keen interest in retailing over the last decade and have successfully established organized retail chains, notable among which are headed by the Future (Pantaloon) group, the Rahejas, the Piramals, the Tatas, the RPG group, Subhiksha etc. Reliance, one of the latest notable entrants in the retail sector, which had initially opened stores in Hyderabad and now has over 450 stores across India, has ambitious plans of expanding in this sector. Along with these domestic developments, there has been a simultaneous attention being given to the Indian retail market by international retail giants, mainly because of the sheer size of the market. The most

² The Economic Times, N. Delhi, August/September 23, 2007

important development in this context has been the tie up of Walmart, America's largest retail chain with Bharti, the Indian telecom giant which is likely to be concretized in June, 2009.³ India, today, is one of the most attractive destinations for retail investment by the global retail giants. This has led to a controversy regarding whether Indian retail should be opened up to foreign companies and its likely effects on local economy.

However, whether it is through the local companies or global ones, the fact remains that the overall move is towards expanding the organized retail sector in India. The rapidly increasing number of shopping malls especially in the metropolises like Mumbai, Delhi, Kolkata, Chennai, for example, bears a clear testimony to this fact. However, in the next five years a huge number of shopping malls are likely to emerge even in the medium and even small cities (i.e. Tier II and Tier III cities) though mall culture is not much in vogue in the small cities till date.

According to A.T. Kearney Report, 2007 India is one of the most sought-after destinations for organized retailing for the global retailers. Currently it tops the list of countries in terms of Global Retail Development Index, 2007 prepared by AT Kearney. In terms of level or stage of development Indian retail sector can be divided into a few zones. A survey conducted and documented in the Jones Lang LaSalle Meghraj report entitled "The Geography of Opportunity - The India 50" (June, 2007) has also identified 50 Indian cities which are the potential beneficiary of the organised retail boom. These have been divided into five categories:

a. **Maturing**– Delhi, National Capital Region (NCR), Mumbai belong in this category and these markets are seeing saturation. However large one-stop malls having retail, entertainment, food and hospitality would have demand, along with hypermarkets, and malls

b. **Transitional**– These include cities like Bangalore, Kolkata, Hyderabad, Pune, Chennai and Ahmedabad. By 2008, they would account for one-third of total market due to their large corporate sectors, high level of economic activity, above-average income and large middle class.

³ Business Standard, November 13, 2008.

c. **High-Growth**– These are the ‘next’ retail destinations of Chandigarh, Jaipur, Ludhiana, Lucknow, Kochi, Surat and Vadodara.

d. **Emerging**– They include cities which are tourist oriented, and have setup infrastructure for IT companies like Nagpur, Indore, Nasik, Bhubaneshwar, Vizag, Coimbatore, Mangalore, Mysore, Thiruvananthapuram, Amritsar, Agra and Goa.

e. **Nascent**– These offer the first-mover advantage as the income levels and corporate activities are limited. The cities are Patna, Bhopal, Meerut, Asansol, Varanasi, Kolhapur and Sonapat. The top 15 cities in the list will contribute more than 80 per cent of the total national retail business by 2008

Interestingly, organized retailing in India has penetrated maximum in case of shoes (22%) and apparel (12%) followed by books and music (entertainment products) (9%) and jewelry and accessories (8%). However, food and grocery and pharmaceutical products are still largely over represented by traditional unorganized sector retail formats (1%).⁴ Currently the most popular organized retail formats are the following:

- **Malls:** Shopping malls are the largest form of organized retailing today. These are located mainly in metropolitan cities, in proximity to urban outskirts. The area of shopping malls ranges from 60,000 sq ft to 7,00,000 sq ft and above. The idea is to lend an ideal ‘shopping experience’ which includes an amalgamation of product, service and entertainment all under a common roof. Examples include Inorbit Mall in Mumbai, Ansal Plaza in Delhi, South City mall in Kolkata.
- **Specialty Stores:** these are stores that focus on specific market segments, specializing on particular products such as entertainment and recreation products, gift items and so on. The most notable among these include chains such as the Bangalore based Kids Kemp, the Mumbai books retailer Crossword, Times Group's music chain Planet M.
- **Discount Stores:** As the name suggests, discount stores or factory outlets, offer discounts on the MRP through selling in bulk reaching economies of scale or excess stock left over at the season. The product category range includes variety of perishable/ non perishable goods.

⁴ http://www.valuenotes.com/one-time/IndianRetailSector_11oct06.asp?ArtCd=86179&Cat=&Id=

- **Department Stores:** Large stores ranging from 20000-50000 sq. ft, catering to a variety of consumer needs. These include localized departments such as clothing, toys, home, groceries, etc. the popular among these are Big Bazaar, DMart etc.
- **Hypermarkets/Supermarkets:** Large self service outlets, having a strong focus on food & grocery and personal sales are termed as Supermarkets. Super Markets can further be classified into mini supermarkets typically 1,000 sq ft to 2,000 sq ft and large supermarkets ranging from of 3,500 sq ft to 5,000 sq. ft. These stores today contribute to 30% of all food & grocery organized retail sales. Examples are Foodland Fresh, Haiko, Shoprite etc.
- **Convenience Stores:** These are relatively small stores (400-2,000 sq. feet) usually located near residential areas. They stock a limited range of high-turnover convenience products and are usually open for extended periods during the day, seven days a week. Prices are slightly higher due to the convenience premium.
- **MBO's:** Multi Brand outlets, also known as Category Killers, offer several brands across a single product category. These usually do well in busy market places and metropolitan cities.

Although organized retail sector is fast emerging, it is a major challenge for the sector to overcome three major constraints -skill shortage, attrition and logistics-.

Skills shortage: According to Business Line reporting (April 20, 2007) “organized retailers face a huge problem -finding the right kind of people to man the stores.” Mr S Jagdish, Vice president of Heritage Foods (Retail Division) says ‘there is absolutely no talent available in the market. We alone need 2,000 people this quarter.’ (Business Line, 2007) However, the skill shortage is more among those manning the floors rather than at the managerial level. In view of the current shortage in skilled labour needed for organized retail most of the companies such as Subhiksha are resorting to in-house training—which are usually short-term trainings conducted on a monthly basis. Some other leading retailers also have tie-ups with leading business schools to train their employees.

Attrition: Attrition is another problem that the organized retailers are currently facing at a huge scale. Though it is experienced at all levels, the big retail brands are facing 40-60% overall attrition rate and 20-30% attrition rate at junior and middle levels. Frontline staff

attrition in retail is around 20-30 %.⁵ The retail managers are of the opinion that on-job training are useful in building a company culture and hence help in better retention rates.

Logistics: logistics is a major hurdle for the organized retail sector. Logistics cost is an important component in the total cost. While it is 4-5% of the total retail price at the global level, in India it is as high as 7-10%.⁶

2.2 Reasons for retail sector boom in India

The most important factors responsible for retail sector development in India are liberalization of the economy, upward mobility of middle class, shifting consumer demands, and expansion of ICTs (A. T. Kearney Report, 2007). Liberalization of the economy since the 1990s is definitely the single-most important factor leading to a shift towards a new organized form of retailing. Organized retailing is expected to bring about positive employment impact in terms of quantity (more jobs will be created) and quality (security of job, benefits etc. will be better). Since the liberalization of the economy there has been a visible impact on the income level of the middle class, which as a whole is upwardly mobile, with a huge disposable income in hand. Along with this there has a change in the spending habits with more focus on improving the quality of life through increasing consumption of high end products, which previously the middle class refrained from using (Table 1).

⁵Business Line, June 8, 2007

⁶The Financial Express, November 6, 2007

Table 1: Map of India's Income classes

	1994-5	1999-2000	2005-6
RICH (Annual income US\$ 4,700 and above) Benefit Maximizers: Own cars, PCs	1 million households	3 million households	6 million households
CONSUMING (US\$ 1,000—4,700) Cost-Benefit optimizers: have bulk of branded consumer durables	29 million households	55 million households	75 million households
CLIMBERS :(US\$500—1,000) Cash-constrained benefit seekers: have at least one major durable	48 million households	66 million households	78 million households
ASPIRANTS (US\$350—500) New entrants into consumption: have bicycles, fans	48 million households	32 million households	33 million households
DESTITUTES (Less than US\$ 350) Hand-to-mouth existence: Not buying	35 million households	24 million households	17 million households

Source:http://www.valuenotes.com/one-time/IndianRetailSector_11oct06.asp?ArtCd=86179&Cat=&Id=

There has been a remarkable change in consumer taste and preferences over a last few years since the opening up of the market, entry of foreign brands and their products. With increasing disposable income and exposure to global products and the media the preference for the relatively expensive but quality-guaranteed branded products has increased. Urban population today is increasingly becoming fashion conscious and hence brand names are more important to them more than the utility aspect of the products. Exposure to the internet and privatization of the television channels also contributed immensely to shifts in consumer demands leading to the need for more sophisticated retail chains to cater to their varied and specialized demands. The huge proportion of young population in India implies a demographic dividend for the retail sector since this portion of the population is more brand conscious and ready for spending more on consumer goods.

Recent concerns in retail

The recent US financial meltdown however seems to have badly affected the growth of retail in US. There is an apprehension of its possible effects on retail in India.⁷ Although till now there is no concrete evidence of immediate slowdown of Retail in India, organized retailers like Reliance are taking more cautious steps towards future expansion in retail. The media has recently reported the latest news of Reliance closing down its stores, though it has been officially denied by the company.⁸ Retail, however, has not been mentioned among those sectors, likely to be facing retrenchment in immediate future in the Assocham Report (2008) on job cuts, which was withdrawn due to pressures from the government.⁹

2.3 Recent Issues concerning growth of organized retailing

The most important debate concerning the implications for the expansion of the organized retailing in India revolves around whether it is going to have positive impacts on the economy as a whole as compared to the traditional unorganized form of retailing. According to one camp, it has overall positive impacts in terms of generating more number of employments, new diversified forms of employments, and improving the nature of retail employment (higher salary, more job benefits, security of job, employability etc). This form of retail sector is also looked upon as a huge sector having immense business opportunities for entrepreneurs and capital investors. Moreover, organized retailing is considered to be efficient and apt to cater to the diversified and changing nature of the consumer demands in growing economies like India. The general benefits of organized retail also include improved supply-chain, improved marketability of farmer's produce and it is also expected that it will contribute to heightened economic activity.

⁷ Yahoo news, Sep. 27, 2008

⁸ IndiaRetailBiz, Nov 14, 2008

⁹ IndiaRetailBiz, Nov 1, 2008

As against this view, the critics of this emerging phenomenon point to the inevitable negative impacts of organized chains on the unorganized and small retailers who are under the threat of simply being wiped out by the powerful organized networks of giant retail chains. Moreover, the employees of the unorganized sector do not have the necessary skills or education required to be absorbed in the organized sector. (Kalhan, 2007) Hence the claim of overall positive impact on the economy and employment in particular is brought under scrutiny. There have been major protests being launched by the unorganized retailers, who claim that their sales have evidently been affected due to the emergence of the organized retail giants. “ The livelihood of five crore traders across the country is at stake if the government does not rethink the retail strategy” says Mohan Gurnani, President of the Federation of Associations, Mumbai who is a leading protestor against the government policy to slowly facilitate the boom of organized retail.¹⁰

However, the advocates of organized retailing have their own set of arguments to defend their position. The President of CII (Confederation of Indian Industry) Mr. Sunil Mittal emphasized that the traditional unorganized retail will not be wiped out by the organized form. He said, “The retail industry in the country will grow to \$500 billion in the next 10 years from the existing \$300 billion, while organized retail would only account for \$100 billion, so the unorganized sector would also witness growth.” He also added that international evidence supports this claim. In US, for example, the number of mom-and-pop stores increased by 2% in spite of the presence of Walmart¹¹. A draft report submitted by Indian Council for Research on International Economic Relations (commissioned by the ministry of commerce and industry in February, 2007 to assess the impact of big retail chain on the small shops in the vicinity) claims that organized retail does not negatively affect unorganized retail in the long run on an ‘absolute basis’.¹² According to the ICRIER report (May, 2008), unorganized retailers in the vicinity of organized retailers have been adversely affected in terms of their volume of business and profit. However, the adverse impact on unorganized retailers tapers off over time. It also claims that there was no evidence of a decline in overall employment in the unorganized

¹⁰ Business standard, Mumbai, June, 2007

¹¹ Business Line, N. Delhi, May 25, 2007

¹² Financial Express, Dec. 7, 2007

sector as a result of the entry of organized retailers. The second important debate is regarding whether Indian retail market should be opened up to the international retail giants such as Wal-Mart, Tesco, Sears, Target etc. Whether the Indian retail entrepreneurs will survive competition from these established global retail chains is a pertinent question regarding current developments in retail market. Related to this is the current debate concerning Foreign Direct Investment (FDI) in the retail sector. Presently FDI is completely prohibited in case of multi-brand retail. In case of single-brand retail, 51% FDI is allowed with prior government approval. According to the supporters of liberalization of retail sector, restricted FDI poses to be an impediment towards organized retail growth since it requires immense capital, technology and application of latest global best practices.¹³ However, due to strong opposition by the Left, the central government has not taken any further positive step for opening up of retail for FDI. The main concern for opposition is concerning its likely adverse impact on the traditional unorganized sector retail employment. Moreover, there is also the possibility that the foreign retail majors will hurt domestic players with the practice of predatory pricing and become monopolies. Finally, most of these stores will be focused on major cities and big towns which might result in a skewed urban development. (Chauhan, 2006)

2.4 Employment in retail sector

Retail is a huge sector for employment in India, including organized and unorganized sector. It is evident from Table 2 that in India within the retail sector maximum employment till today is found in the sale of food, beverages and tobacco. However, it is interesting to note that growth rate in employment has been highest in the sale of new goods in specialized stores (4.45%). Around 1/3rd of retail employees are currently absorbed in Trade of new goods. This implies that the retail sector in India is quite sensitive to technological developments as well as successful in the creation of markets for new products, attracting more employment in this kind of retail activity over the years. On the other hand, sale of food, beverages and tobacco has witnessed a negative growth rate in employment over the last few years (-1.17%). The trends are similar in case of both male and females.

¹³ The Economic Times, July 18, 2007

Table 2: Retail sector in India: Growth during 1999-2000 – 2005-2006

Industry (NIC 2004 code)	Urban + rural persons		Urban + rural Male		Urban + rural female	
	62 nd	55 th	62 nd	55 th	62 nd	55 th
Non-specialized retail trade in stores(521)	7.9 % (2.18)*	7.3 %	7.7 % (2.33)*	7.0 %	6.3 % (-4.48)*	8.6 %
Sale of food, beverages and tobacco in specialized stores(522)	44.7 % (-1.17)*	51.9 %	42.9 % (-0.93)*	49 %	53.1 % (-3.76)*	69.7 %
Trade of new goods in specialized stores(523)	34.2 % (4.45)*	26.9 %	35.2 % (4.06)*	28.5 %	28.1 % (9.27)*	15.2 %
Retail trade not in stores(525)	3.9 % (0.47)*	4.4 %	4.4 % (3.14)*	3.8 %	6.3 % (1.56)*	5.6 %
Repair of personal and household goods(526)	9.2 % (-0.67)*	10.3 %	9.9 % (-1.32)*	11.6 %	3.1 % (20.09)*	0.9 %
Estimated Labour Force in Retail (Unorganized and Organized)	27646110 (7.6%)** (0.94)*	25886321 (7.7%)**	24508475 (9.1%)** (1)*	22865778 (9.3%)**	3022102 (3.2%)** (0.04)*	3013188 (3.3%)**

Note: NIC 2004 code indicates 4 Digit National Industrial Classification of industry

*Figures in parenthesis indicate compound annual growth rate

** Figures in parenthesis indicate percentage of total labour force in India

Source: Computed by authors from NSSO 62nd and 55th rounds

Employment in sale of new goods has the maximum share of regular wage salaried, implying relatively high skilled and higher educated manpower requirements for sale of these items (Table 3). On the other hand, highest share of self-employment within retail is in non-store Retail trade (94.5%) and Sale of food, beverages and tobacco in specialized stores (87.9%), largely represented by the unorganized sector.

Table 3: Retail sector according to employment status (Percentage Distribution)

Industry	Self employed	Regular Salaried/wage	Casual Labor	Total
Non-specialized retail trade in stores	85.6	12.2	2.3	100
Sale of food, beverages and tobacco in specialized stores	87.9	9.6	2.5	100
Trade of new goods in specialized stores	68.3	27.5	4.2	100
Retail trade not in stores	94.5	5.2	0.3	100
Repair of personal and household goods	78.6	16.7	4.7	100
Retail Total	80.5	16.4	3.1	100

Source: Computed from NSSO 62nd (Unit level data)

Traditionally retail in India has served as a source of employment for relatively low-income groups seeking livelihood with minimal education or skill. Retail can absorb this category of labour since it requires relatively less skills. Hence it absorbs a huge section of Indian population who cannot seek employment elsewhere in the economy. Moreover, it also offers scope for self-employment. In India there are a huge proportion of street vendors and hand cart pullers who capture a considerable share of retail business. Apart from them, illegal roadside stalls and mom-pop stores dominate in the neighborhood, offering employment mostly to young less-educated and low skilled labour hailing from low-income group families in dire need of employment.

However, with the emergence of organized retailing nature of employment has completely changed in retail. Managed by corporate retail chains, the employment status also matches other corporate sector employment. Hence, the skill expectations and performance levels are also much higher. This sector looks for skilled labour. The demands from the prospective employee are much higher. Hence naturally it is not easy

to gain employment as it has been in the traditional forms of retailing. The entire conceptualization of labour is very different from that in unorganized retailing.

3 Organised and Unorganised Retail: two case studies

To compare the organized and unorganized forms of retailing, two case studies have been done, one to represent each category. The organized form of retailing has been studied by taking the case of Palm Beach Galleria Mall in Vashi, New Bombay. For studying the unorganized sector Chembur Market has been selected. Both the case studies were selected on the basis of convenience of access in terms of involving least commutation hassles. In case of Palm Beach Galleria in depth interviews were conducted with the Mall Managers, the employees of select stores in the mall, the security and the housekeeping staff of the mall. In Chembur market, interviews were conducted with the owners of select stores. However, interview with the employees could not be conducted since the owners refused to give permission for interviewing them and offered to respond to the questions on behalf of the employees. Our investigation covers the following research questions:

- What are the major differences in conceptualization and operationalisation of labour in organized vis-à-vis unorganized sector?
- What are the differences in management practices and techniques of handling labour?
- What is the nature of employment ?
- What are the main issues/problems faced by employees?
- What are the problems of employers in terms of demand side issues such as shortage of skills, attrition etc.?

The cases have been used to identify the trends under the main research questions. For example, under the question of conceptualization of labour, we map the data to understand the expected behavioural norms to be followed by the employee, instructions concerning grooming of their appearance, skills they are supposed to embody etc. We compare the trends with the unorganized retail sector: the employment status,

management practices employed, labour profile, challenges faced by both the employers and employees and draw implications on the retail labour market in India.

Palm Beach Galleria is one of the newest malls (operational for just over a year) in New Bombay, located in the Palm Beach road in Vashi. It was established by the B. Raheja group of builders, recently taken over by the Lakhani group. The mall houses 73 store outlets with a food court and a banquet hall *Mayfair*. Apart from this the mall also has a multiplex *Adlabs*. The total staff includes around 500 sales persons and 210 housekeeping and security staff. The store-staff are completely under the management of respective corporate houses of the respective retail companies. House keeping and security comes under the mall management, although the management of the staff has been outsourced to two companies: *Trig* for security and *Unisol* for housekeeping. An essential part of the mall is an active and alert security and diligent housekeeping. Located at a strategic place in Vashi on the Palm Beach road, the mall has emerged as one of the latest hot-spots in Mumbai. Apart from housing major brands it has a unique blend of stores, which are not available in the nearby area. The mall also arranges regular events for attracting shoppers specially on occasions such as Deewali, Valentines day, Mothers' Day and so on.

Chembur Market is the most popular shopping destination for the people in and around Chembur. The uniqueness of the marketplace is that it includes a variety of shops. The shops are varied in terms of --the categories of product sold, size of retail outlet, customer range. It includes shops selling all categories of products, ranging from electronic goods, garments, grocery, household goods, jewellery, pharmacy, entertainment items, as well as eateries and restaurants. The stores vary in size from very small shops to large air-conditioned two-storied ones. It also has brands such as Titan. The customer range is huge from lower-middle class to even upper class. Apart from these stores, there is an active and huge regular road-side vendoring which takes place along the pavements which is very popular in this market.

In case of organized retail survey, interviews were conducted in Palm Beach Galleria with the malls management, the employees of select stores, the security and the housekeeping staff. The stores were selected on the basis of product category: garment, shoes, jewellery, gifts and grocery. In each of the stores interviews were conducted with the store manager and the sales staff, two from each store. Apart from this, in-depth interviews were also taken of the house-keeping staff: Assistant facility manager, supervisor, pantryboys and chambermaids. In case of security following people were interviewed: security officer, vigilance officer, and guards. In case of unorganized retail, the following stores were selected in Chembur market on the basis of product category: garments, shoes, jewellery and grocery. Interviews were conducted with the employer-cum-owner-manager in each store. However, interview with the salespersons could be conducted only in one of these stores, where the shop was managed by an employee and the not the owner himself. In the rest, the owners spoke on behalf of the employees.

Analysis consists of the following aspects: Conceptualization of labour, Management practices and mechanism of handling labour, Employment status, Problems faced by the employers, and Problems faced by the employees.

Conceptualization of labour

In the organized sector retail, the overall expectation for skill is quite high as compared to its unorganized counterpart (Tables 4 & 5). The prospective employee is expected to be a 'skilled labour'. Skills includes: ability to interact nicely with customers: Understand customer needs and tastes and help him/her select an appropriate product and product knowledge. The employers look for these skills (at least some of these) in the prospective employee. Hence, mostly they employ people having past work experience in the retail (preferably organized). In case of unorganized retail on the other hand, skill expectations are minimal. The labour is expected to learn their duties informally while on job after recruitment. In the organized sector retailing high importance is attached to adhering of certain levels of behavioral norms/etiquettes while dealing with the customers. There is a strict code of conduct conveyed to the employees wherein they are expected to be extremely polite and indulge in a friendly interaction with customers. Etiquettes such as

greeting the customer etc are specifically taught and any form of misconduct from the employee is dealt with serious action. In case of unorganized sector, instructions to deal with customers include politeness and patience. However, apart from these basic norms to deal with customers, no extra lessons for manners or behavioral standards are set out for them. Importance is also attached to the presentability of the employees. The entire idea of grooming and presentability of the sales staff and other employees of the store is very unique to organized retail, something entirely missing in case of traditional forms of retailing. They employers are very particular about this aspect. The instructions concerning this include: Clean uniform (provided by the company) preferably formal dress, polished shoes and overall tidiness concerning dress and appearance (particularly hair). The conceptualization of labour in the organized retailing has resemblance to the standards adopted for the corporate sector employees since these are controlled and managed by the corporate houses. Hence proper grooming, presentability, soft communication and marketability skills etc are extremely important for the employees.

Table 4: Skill requirement for retail employment as a sales person

Organized retail	Unorganized retail
Overall, importance given to soft skills	No 'skills' expected
Desirable personality traits:	
Smartness, Good communication skills Presentable appearance, which can be groomed further, Eagerness to learn and improve, Positive attitude	Honesty
Language skills:	
Fluency in Hindi at least English is preferable but not absolutely necessary (can be learned later)	Basic Hindi
Past experience:	
Preferable but not compulsory	Not needed
Education:	
Min. 10 th standard but often higher educated (up to graduate) is selected since they usually have better communication abilities	Not very important

Source: Primary Data

Table 5: Differences in skills acquired after employment

Organized retail	Unorganized retail
Observed personality traits:	
Smart Extremely Polite Conscious of etiquettes Presentable appearance and well-groomed Positive, friendly and helpful attitude	Polite/patient Submissive
Soft skills:	
Good Communication skills Ability to understand need of customers	Good communication skills
Language skills:	
Fluent in Hindi and moderately fluent in English	Basic Hindi
Product knowledge:	
Good knowledge of product quality and variety	Basic product knowledge
Past experience:	
Mostly with past experience in retail	In some cases
Education:	
Ranges from 10 th pass out to graduates, with more numbers on the higher end	8 th / 9 th std drop-outs

Source: Primary Data

Management practices and mechanism of handling labour

In organized retailing, labour is managed and controlled by the corporate office of each retail store. These corporate offices have hierarchical managerial structures which govern the entire operations of the retail chain right from procuring of raw materials to sale of the product in the front-end retail outlets. In the unorganized sector, on the other hand, mostly family members own and manage the particular store. In very few cases, managers are employed to manage business or look after the store, which is usually done by the owner himself. Surveillance mostly includes monitoring and observing the performance of the employers through camera. Most of the stores have cameras which are directly linked to the corporate head office, from where instructions come regularly.

In traditional retail stores, surveillance is direct since in most of the cases the owner himself is present in person during the store hours. In organized sector retail there is an attempt to implement modern management practices to deal with labour, whereby they are treated in a friendly manner. At least, there is an aura of friendliness that is attempted to be created by the managers even while instructing the labour. The employees say, “We stay like a family here. This is our second home.” Mostly, they work as a team. Informal

relations are also sought to be fostered through celebrating together in informal parties and so on. In the unorganized sector, the relation of the employer with the employee is clearly and blatantly authoritative and instructive.

In case of organized retail, formal training is provided to the employees immediately after recruitment. In case of the sales staff, the training period lasts from 3 days to about a week. Trainings are usually provided by the specific brands, whose products the company sells. Training and updating of it also happens at the store level. The trainings basically cover two aspects: customer interaction and product knowledge. Detailed instructions regarding how to deal with customers are given, including manners, enhancement of communications skills etc. Product knowledge includes some knowledge provision regarding the variety, quality, material of the product. In case of the house-keeping and the security staff, the training is more rigorous and detailed. It includes instructions regarding use of cleaning fluids etc to maintain the cleanliness and hygiene of the mall. Security training involves detailed sessions on fire control, instructions for maintaining the overall safety and security and fire exit management of the mall. They also receive instructions concerning managing the parking zones, keep watch over CCTV of the mall, regarding behavior with customers and norms concerning cleanliness and self-grooming of the employees. The training sessions are conducted every two months to update the skills of the employees. In the unorganized retail, on the other hand, no formal training is imparted to the employees. Learning of job duties and responsibilities usually happen through informal ways—learning while on job from senior sales staff.

Employment status:

Organized sector retail offer jobs which have the benefits of permanent employment such as Employee Provident Fund and medical benefits (Table 6). Some companies also offer annual paid leaves. Employment in unorganized retail, on the other hand, is casual operating mainly on the principle of “hire and fire.” Salary scale is much higher in organized retail as compared to unorganized sector. While in the unorganized sector, helper to the salesman gets a salary of around 2,500-3,000 per month, the sales staff in retail store in a mall would get up to 6,000 to 6,500 per month, which shows that the

salary scale in organized sector is almost double that in unorganized sector. However, in case of organized retail, the salary scale depends on the retail store model. If it is a branch outlet, the salary scale is higher than in case of franchise outlets. Unlike that offered in unorganized retail, employment is not casual in case of organized retail. The job has all the benefits offered by permanent employment: Provident Fund, Medical benefits etc. In case of organized retail, work hours is usually from 10am to 9 pm. There is a weekly off which can be any weekday. Holidays includes yearly paid leave for 30 days. In case of unorganized retail, on the other hand, hours of work are from 9 am to 9 pm. The employees are expected to work for six days a week. Monday is officially a holiday but shops usually remain open for half day, when the employees get overtime (double the salary). Leaves are at the mercy of the respected employer. They may grant leave only if they wish to.

All the interviewees confirmed that in the organized retail sector, there is a huge scope for fast promotion within the hierarchy of employees: that starts with sales staff followed by assistant store manager, store manager, area sales supervisor. There is a scope for rapid promotion depending upon the performance and abilities of the employees, which is monitored and evaluated regularly. Within 5 years an employee can move up from the post of salesman to asst. store manager. Promotion from store manager to area sales supervisor also takes around 4 to 5 years. In case of unorganized sector, on the other hand, growth is possible but it is slow. The growth prospects are not much since growth is possible from the post of helper to only salesman. Most of these stores are managed by the employer cum owner himself. Hence in most of these cases the post of store manager does not exist.

Employability in case of organized retailing is evidently much higher. The companies usually make sure that there is job rotation. For example, in case of house-keeping of the mall, the same staff is given different responsibilities at different times so that s/he learns all kinds of duties that house-keeping entails: floor cleaning, glass cleaning, maintenance of toilets etc. This is aimed to make the employee more diversely skilled which in turn increases his/her employability. Moreover, continuously encouragement is provided for

on-job growth, by improving language skills (improvement in English through conversing) for example.

Table 6: Employment status in the organized and unorganized retail sectors

	Organized retail	Unorganized retail
Nature of employment	Semi-permanent	Casual
Salary scale	Much higher (higher limit is almost double)	BMC scale (3,000 per month average)
Other benefits	All benefits of permanent job: Employee Provident Fund and Medical Benefits	No benefits
Holidays/leaves	6 days work 1 weekly leave 30 days yearly paid leave	6 days work Overtime for weekly off No official leave
Growth prospects	High	Low
Employability	Higher	Lower

Source: Primary Data

Problems faced by the employers

In case of unorganized retail, the problems faced by employers are mainly two: *High attrition rate*: Since it is casual employment, the staffs often leave without notice or prior intimation. The employers reported that the attrition rate is quite high now-a-days since salary is not very lucrative and there are higher paying jobs available in the market. Moreover, the work hours are long and unorganized retail job does not offer any benefits. *Shortage of labour supply*: Some of the employers also reported that there is a problem of shortage of labour supply due some of the above reasons. Young people are attracted to higher paying jobs offered by other sectors.

In case of organized retail, on the other hand, there was no mention of any significant problem faced. However, the problem of attrition was reported by some of the respondents. According to the mall managers, attrition rate is as high as 40 to 45% in case of security and house-keeping staff. These employees who usually come from poor families simply quit without any prior notice which at times creates a problem. Attrition rate is mostly faced at the lower level jobs such as sales staff rather than at managerial levels.

Problems faced by the employees:

In case of unorganized retail employees, access to them was a problem since the employers did not give permission to interview them and answered on behalf of them. There is strict authoritative control over the employee at least during the work hours. In case of organized retail, three main problems were reported by the respondents:

- Customer behavior: Sometimes the customers behave very rudely with the sales staff, which they have to face without reacting to it. As a salesperson they cannot be rude to them by rule, yet sometimes they have to occasionally confront insulting behaviour from the customers, which evidently is not a pleasing experience for them. The respondents reported their unhappiness regarding rude behavior from customers.
- Less walk-in: When there is less customer walk-in to the store, it is difficult for the sales staff to meet the sales target set out for them. Hence they have to take extra efforts so that they do not miss the few customers that enter the store or try for “add-on” sales (i.e. sale of products not initially intended to be bought by the customers).
- Long work hours and unusual work-days: Some respondents have reported the problem of long work hours in case of retail. Moreover, they cannot afford to take leave on week-ends and public holidays. During festivals they cannot take leave or celebrate at home since sales is highest during these festivals.

Apart from these problems reported by the respondents, the interviewers observed that there is a strict surveillance mechanism (both manual and technological i.e. through camera) and strict discipline and norms that are expected to be followed by all the employees within the mall. They maintain a strict record of attendance, performance and behavior of the employees.

Broad findings on organized retail labour market as against unorganized retail

Overall employment status is much better in organized sector as compared to unorganized sector: Not only is salary much higher (almost double) in case of organized sector retail, the employees also get additional benefits like PF, medical cards, yearly paid leave etc. Social security and job security is evidently much stronger in this retail sector. Moreover, the employees are usually treated in a better way in the sense that there is at least an aura of friendliness and co-operative attitude that is maintained with the employees. However, pressures to observe the behavioral guidance as laid down by the company are quite strong. As against this, the objective employment status in case of unorganized retail is worse, with low salary, no job security, no additional benefits, and direct authoritative control from the employer. The employee is virtually at the mercy of the employer who entirely operates on the principle of “hire and fire.”

Organized sector employees are evidently much more skilled: Organized sector retail employees are quite skilled so far as dealing with customers is concerned. All the salespersons take active efforts to make sure that the products are not only sold but the customer is happy and therefore will come back to the same store for buying the product. This they ensure by communicating to the buyer, trying to understand his/her needs as well as tastes and choice. Apart from skills to understand customer need, they are trained to be polite and courteous, so that the customer feels comfortable. Hence, greeting the customer in the right manner as well as presentable appearance of the salesperson is given immense importance. The idea is to treat customers as “gods”. How far these etiquettes are important in the Indian context is a different question. Whether this courteous behavior according to Western standards actually helps to impress the Indian buyer is not clear. However, these employees have to take care of their manners according to the guidelines provided by the company. All these skills are usually acquired after recruitment through both formal and informal means. They receive training by the product brands as well as continuous instructions and briefings from the store manager. In case of organized sector, skill expectations are nominal. The employee is expected to have some communication skills; active initiative to get the product sold is much lesser.

Mostly they learn to deal with customers through informal means while on job, that is, from senior salespersons.

Getting employment in organized retail is more difficult compared to unorganized sector: In case of organized retail, past experience in organized retail is very important for recruitment. Most of the respondents had past experience of working in organized retail. Although all the companies have their own training sessions after recruitment, in retail skills are expected to increase with experience. Freshers are employed only as sales staff. Other posts compulsorily require past experience. Personality traits matter a lot, where they are expected to learn and pick up the norms of organized retail in a prompt way. Presentable appearance is preferable, which is groomed further after recruitment. Moderate fluency in English is an added advantage. Finally, education makes a difference in the way the person carries himself or deals with people. Hence, even if education is not a first criterion for selection, most of the people who are working in this retail sector or gain entry into it are well-educated usually having a graduate degree. In case of unorganized retail, on the other hand, recruitment is done on the basis of recommendation, where the employer is more concerned about the honesty and loyalty of the employee rather than his/her skills. Education has no relevance in his job. The employer just makes sure that the person comes from known sources and he gets to know about family whereabouts. His duties are explained after recruitment and slowly he learns the art of dealing with customers through informal means.

Pressure of performance is much higher in organized sector retail: In organized retailing essentially involves an active effort on the part of the employees to meet the expectations from the employers. Performance is monitored and evaluated on a regular basis, including attendance. There are daily reports that are sent to the management. The surveillance mechanism is strong where they are continuously supervised by manual and technological assistance (camera). Moreover, there are sales targets that the sales persons have to meet over the month or week. Apart from performance evaluation they also have to abide by the strict norms to behave in a particular manner and observe disciplinary rules (See Box 1 & 2, Appendix).

4 Concluding remarks

The preceding analysis leads us to delve into the implications for current trends in retail employment scenario in India. What is most important to note is that a huge portion of the current labour, employed in unorganized retail, is unfit for employment in organized retail. Organized retail evidently needs supply of higher end labour that has better education and skills. The conceptualization of labour is entirely different. The expectation of performance level is also different and much more demanding. The question is where do we get this particular form of labour? According to available literature, there is a scarcity of appropriate labour to cater to the needs of organized retail. However, interview with the managers in mall did not bring out this aspect of the problem. They seem to be experiencing more of a problem of attrition than shortage of labour supply. However, the problem of finding appropriately skilled labor supply remains an issue. In most cases the retail management employs and provides training after recruitment.

Firstly, the basic minimum level of education that is presupposed to be required for employment in organized retail itself is an issue in a country like India where one-third of youth is illiterate. Only those who have these basic minimum requirements can hope to get entry into this sector of retail. Training remains another important issue. Appropriate training for sales staffs at the floor level which is currently being provided by respective company, that is, training is provided post-recruitment and by the retail industry itself. While there are initiatives at the managerial levels to provide retail specific training and education, by the Finishing Schools, for example, such initiatives for providing necessary skills and training for shop-floor level staff is not available.

In view of the mismatch between the demand and supply of labor force in organized retail, any initiatives for instituting courses aimed to cater to retail specific skill requirements would immensely help to reduce the burden and cost of in-house training by the retail industry. Moreover, from the developmental point of view, the question

remains: can the demographic dividend and the huge labor supply of India, if given appropriate training, be absorbed by the growing retail sector in India? Provided the low level of educational attainment of the labor and elaborate training needs and skill-demands (specially soft-skills) of the industry it is difficult to visualize an all-comprehensive solution that can serve as a magic pill to ease the problem of current mismatch between demand and supply. However, it is important to highlight that in organized retail, the status of employment is much better than that in unorganized retail. Hence it is definitely desirable that more and more labour gets absorbed in this sector of retail. In the current context, the labour employed in unorganized retail stands unfit for finding employment in organized retail. If appropriate training and skills could be imparted to them, it is possibly feasible to offer better forms of employment to them in the organized retail sector.

Appendix

Box 1: Organized Sector Retail Employee:

Priyanka is working as a store manager in Lucera, a jewellery store in Palm Beach Galleria for the past one and a half years. She seems to be quite happy with her job. She is extremely loyal to the company and hardly needs a reason to praise her company and her management, specially the CEO with whom she interacts directly. According to Priyanka, her CEO is extremely friendly and has an informal relation with all her employees. She is the one who taught her everything concerning her job and continuously guides her regarding management of the store.

Before joining this company, Priyanka had worked for about one year as a cashier in Titan, where salary was much less. She had no knowledge of the retail sector when she joined here. But she says that it was not difficult to learn while on job through training as well as from senior colleagues in a short period of time. Priyanka feels that in organized retail recruitment, what is most important is to have a positive inclination to learn and adapt to the needs and demands of the company. Rest the employee can learn while on job. In case of her recruitment, the CEO gave importance to her past experience, her nature (friendly and adaptable), and looks (presentable).

Priyanka has internalized the values of the company very well. She knows exactly what the company expects from her and how she is supposed to deal with the customers. Her remarks make it obvious that she has become quite skilled in terms of dealing with customers. She feels that it is most important for her to establish a friendly relation with customer when s/he enters the shop, make him/her comfortable, understand his/her needs, tastes and preferences and finally help him/her choose the right product. Her aim is to establish long-term relation with the customer, by offering him/her a good and satisfying buying experience.

Overall, she is happy about her job, since her salary is good. However, the only thing she ever felt uncomfortable about her job is the occasional rude behavior from customers. She mentioned one incident where the customer behaved extremely rudely with her and made some insulting comments. The customer wanted to exchange a product after a long period had elapsed since she had bought the item, which was against company policy. Apart from that, Priyanka did not mention any undesirable experience in her current job.

Priyanka is around 25 years of age. She has completed her B.Com., managing her studies along with job. She is basically from Punjab, born and brought up in Mumbai and stays with her family in Koperkhairane, Navi Mumbai.

Box 2: Unorganized Sector Retail Employee:

Ramesh is working as a salesman in a garment shop in Chembur for the last three years. He is 21 years of age, originally from Rajasthan but now his family is settled in Mumbai. Before joining this job he used to manage a small road-side eating joint, which he had to leave because of problems with the owner. He has studied till 10th standard and has plans of studying further along with his job.

Ramesh seems to be more or less happy with his current job. He says that the employees in the shop are like his family-members. Most of them are working here for around 4 years and hence they have developed an informal friendly relation with each other, which is why he would not like to quit this job. However, if offered a better salary he will be ready to quit. Basically a quiet and submissive boy, Ramesh says that it is most important to be patient and polite in his profession. Behaving nicely with customers is very important. He feels most happy when he can sell maximum items to customers and tries to develop a long-term relation with them.

When asked about his future plans and ambitions, he says that he would like to start his own retail business in future. He feels confident that his experience in retail would help him to realize his dream.

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