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POLICIES OF RETAIL SECTOR OF INDIA AND OTHER SELECTED COUNTRIES

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Abstract:
The retail sector is one of the fastest growing sectors in India. Before 1991, the retail sector was mainly unorganized and fragmented. The rapid growth of the organized retail sector has resulted in the decreasing sales of unorganized retail outlets. Along with that, the traditional unorganized retailers were lagging behind in the context of promotional strategies. This study intends to examine the government policies of different countries including India regarding the unorganized and organized retail sector. The present study examines whether the government provides a tight legal framework along with economic support to the small and unorganized retailers to sustain in this big fight. The study concludes that in the environment of intense competition, governments of different countries (including India) had helped small as well as big domestic retail chains through formulating appropriate policies over time. The governments had helped domestic retail chains by providing capital support and/or formulating strict legislations to restrict entry of foreign retailers in their respective countries. In India, all the regulations regarding retail sector is still in state level and is being influenced by the existing political parties of different states. Thus, it varies across states and their impacts are also heterogeneous.

Key words: retail sector development plan, vendor managed inventory, local chains, transnational corporation, regulatory framework.

INTRODUCTION

The retail sector is one of the fastest rising sectors in India. It has contributed 14% share of total GDP and 7% share of total employment in 2004 (Guruswamy et al. 2005, 619). Before 1991, the retail sector was mainly unorganized and fragmented. The unorganized retail outlets used to play the most dominant role in the retail trade in India. Only 2% of total retail sector in India belonged to the organized sector and rest of the 98% belonged to the unorganized retail sector in 2004 (Guruswamy et al. 2005, 619). But over the period, the whole scenario of retail sector has been changing. After the liberalization in 1991 and with the beginning of the storm of the ‘Supermarket revolution’ all over the world, the organized retail sector started to find its place in the Indian retail market and they have been growing in a rapid rate.

Presently, organized retail sector is capturing the market of fresh vegetables and fruits in which the unorganized sector had a lion’s share of the market in India. The

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different forms of organized retail outlets such as hyper markets, super markets, big malls etc. have entered in the market with some extra facilities and with different new technologies. This has resulted in a problematic situation for the entire traditional unorganized retail outlets to compete with the strong organized retail outlets. Though the unorganized retailers provide their products to the customers on a credit basis due to informal relations and an opportunity to bargain, they are still losing out to the new and largely dominant organized retail sector. There are two important questions that need to be answered. One, whether the unorganized sector can retain its share of the market if not expand through their loyalty schemes as mentioned above and the other one, whether the government provides a tight legal framework along with economic support to the small and unorganized retailers to sustain in this big fight.

LITERATURE REVIEW

In the late 60s and early 70s, developing countries like Latin America, Malaysia and Hong Kong etc. were very interested in promoting supermarkets in the name of food-sector modernization for the improvement of the overall competitiveness and efficiency of the sector (Reardon and Gulati 2008). The main reason behind this was that, they had perceived the traditional retail sector as weak and inefficient. But most of these promotional programs were artificial and inconsistent with overall economic transformation and also had not been fed by the private sector investment. As a result of which very few policies had succeeded.

Starting from the early 90s, various nations began supporting the supermarket development as a part of modernization policies. But at the same time, these governments had also adopted policies which were limiting the growth of supermarkets to a certain extent and supporting traditional retailers for their parallel growth with those supermarkets. For instance, Russia and South Korea had taken the policy of tax exoneration for setting up supermarkets in municipalities. Some governments have even directly invested in modern retail explicitly to modernize the retail chain as well as to generate revenue for government.

Many nations imposed regulations on wet-markets (fresh food informal market) for their nonparticipation in paying taxes to the government and also because of the fact that the wet-markets could create street congestion and could be unhygienic, which directly or indirectly could become the constraint in those countries for their development processes. They had imposed strict zoning limits and hygiene regulations on wet-markets. On the contrary, Chinese Government had adopted a program of converting wet-markets to supermarkets which was equivalent to the procedure of transforming unskilled unorganized retail sector to skillful modernized organized retail sector. Moreover, Brazil and Mexico governments had taken ‘intermediate approach’ which developed foods’ formal modern market without providing any protection or support to traditional (informal) retailers.

An interesting observation can be elicited from the study of the different formats of the retail outlets. As the modern formal retailers are tied down only by the local regulations, they tend to bargain or influence the government bodies at the municipal level so that the terms of entry and functioning favor them. This had made it difficult for the governments to homogenize the regulations of the decentralized levels; thus adversely affecting the competition between hypermarkets, local small supermarkets and unorganized retailers. The Federal Competition Commission (FCC) was regulates competition among formal organized sector retailers but not between organized and small unorganized retailers. Thus, these countries had effectively created liberalized situation for modern formal retail diffusion. In case of Mexico, when conflict between organized and unorganized retailers have aroused, government had handled it only at municipal or state level. But the local regulatory authority agencies had imposed significant pressure on unorganized retail outlets. For example, over last few years, street vendors and hawkers had been barred from the central districts of Mexico City only because traditional retail players could not form any significant organization to influence regulations.

On the contrary, in case of Thailand and Malaysia there were some regulations which had been targeted hypermarkets with the view that hypermarkets had some advantages of foreign chains (collaborations), like lower prices over small stores. But as the modern retail chains were very flexible and malleable in terms of company arrangement and store format, the regulations on modern retail diffusion could easily been handled by themselves. The authors had mentioned that, the modern retail chains which were popularly known as 'big box', could take any kind of format like a chain of kiosks, convenience stores, neighborhood markets, supermarkets, hypermarkets and even an 'email order' (even daily goods purchased through email and delivered by the supermarket almost immediately) outlets. Moreover, regulations often take longer time to become effective and in between modern retail chains were usually able to accelerate their expansion before the regulations had been implemented. This rush of new stores has often compelled to change policy orientation in municipalities and provinces. But in case of traditional retailer, they did not have such quality to change municipal governments' policy orientations. As a result the policies had ultimately been decided by the formal retail chains' transformation and the informal ones were the losers.

In case of Taiwan and Singapore, the Government had taken some policies to upgrade the traditional markets, e.g. 105 year old Nanmen wet-market had been upgraded in 1979 in the Taipei city by giving some facilities. Singapore's hawker centre's upgrading programme was a point to be noted. All the regulations taken by the governments of different developing countries (relevant for India) have been briefly presented in the following table.

Table 1. Government policies in retail sector of different countries

Countries	Year	Policy	Sectoral outcome		Given the govt. view
			Formal (organized)	Informal (unorganized)	
Latin America, Malaysia, Hong Cong	1960s & 1970s	Promoting regulation of tiny super markets	Favour	Against	Competitive & efficient formal organized sector
Singapore	1979	Hawker centres upgrading programme	Against	Favour	Formal sector have additional facilities in competition
Taiwan	1979	Upgrading programme of old wet markets	Against	Favour	Formal sector have additional facilities in competition

Table 1. (*continued*)

Russia & South Korea	1990s & 2000s	Dual role regulations	Favour	Favour	Development of traditional sector and formal sector: source of revenue
China	1990s & 2000s	Direct regulations on Wet markets	Favour	Against	Informal unorganized sector is unhygienic
India	Presently, there is no exclusive regulatory framework for the retail sector in India. Regulation of the retail sector is mainly in the domain of the state governments.[2] (In 2007, the Communist Party of India (Marxist) made the demand that big retail businesses should be licensed, to protect small unorganized retailers. Policy makers wanted to make licensing mandatory for those stores with an area of 10,000 sq ft or more and selling food and grocery items such as Atta, edible oil, fruits and vegetable. The local urban bodies would be empowered to grant the licenses. The United Progressive Alliance (UPA) Government had initiated the process of chalking out the licensing regime immediately after getting the suggestions from CPIM)[3].				

Source: Reardon,T, and Ashok Gulati, February 2008. The rise of supermarkets and their development implications International experience relevant for India. International Food Policy Research Institute (IFPRI), discussion paper 00752, 1-49.

Reardon and Gulati (2008) give us a clear insight of the regulations that had been taken by different countries' governments. It also has helped us to understand the level of responsiveness of different types of retail outlets with respect to the policies that had been taken by the government of different countries. In relation to this it has been clearly seen that it is being very tough for the unorganized retail sector to modify their structure according to the government policies whereas the modern organized retail sector can easily do it while also influencing the government to make policies that benefit them. Few countries have made a special effort to come up with policies that help the unorganized small retailers to sustain in the economy. Some of those policies are mentioned below in the following section.

GOVERNMENT POLICIES OF SOME COUNTRIES INCLUDING INDIA

In case of India, there is no exclusive regulatory framework for the retail sector. Regulation of the retail sector is mainly in the domain of the state governments. Different states government had taken different regulations to protect the small unorganized retailers from the big giant organized retailers in the era of "retail revolution." As for instance, in July 2006, the Kerala state government had tightened the regulatory framework for large organized retail companies and announced a special 10 per cent tax on the profits earned by the supermarkets (Franz 2010). In August 2007, the Uttar Pradesh government had also closed down 10 Reliance Fresh outlets without meddling with other supermarket chains. As a result in September 2007, Reliance Retail had cancelled its planned investments to construct another 200 supermarkets and expand its supply infrastructure there. Ultimately Reliance Retail did not find out any other way except reusing their existing premises for its non-food chains such as Reliance Footprints and Reliance Jewels.

[2] http://www.docstoc.com/docs/21326286/Competition-and-Regulation-in-Indian-Retail-Sector
[3] http://www.indiaright.org/storyd.asp?id=277

Resistance of local chains influencing government policies

Resistance of local retail chains in India was also able to influence government policies to favor them. In Orissa, Reliance had given a break on expansion and shut down its only supermarket, which had become an instance where ferocious resistance of small retailers backed by political sanctions had directly influenced the movements of Reliance. The ferocity of the protestors had not only gained media attention but also gave a huge constant pressure on different big organized retail companies. This has been done by continuously creating the threat of the demolition of their buildings and the safety of their staffs and customers. In this way, the corporate power of the big organized retailers had remained restricted by the help of the execution of collective power within the production network. As a result, Reliance had cut back its enlargement target of 2000 to 1500 outlets by 2011 (Bailay 2007).

In 2008, German TNC (Transnational corporation) Metro, which operates Metro Cash & Carry wholesale markets (two in Bangalore, one in Hyderabad, one in Mumbai and one in Kolkata), had also faced the resistance from local small unorganized retailers campaign. This had been done with the view that metro is grabbing a market share from traditional wholesalers and illegally doing the activity of a retailer irrespective of the fact that Metro was having only a wholesale license. Metro had previously faced resistance in 2003, when it opened its first market in Bangalore. When hundreds of local and regional middlemen went on strike, the Karnataka state government had banned its sale of fresh fruit and vegetables. At last Metro had regained its license to trade in fruit and vegetables in Bangalore in 2008.

In case of Kolkata, though Metro had gained a license for selling fresh fruits and vegetables in 2005, it had again been withdrawn in 2007 due to public protests and only regained the silence in September 2008 but with strict conditions[4]. Further, the opening of the Kolkata Metro Cash & Carry in September 2008 was again accompanied by protests. Similar thing happened while opening up Cash & Carry outlet in the Mumbai market in the same year.

So the evidence of the cases of Reliance Fresh and Metro Cash & Carry had shown that the resistance has had an obvious direct impact on the production networks in the Indian retail market. Civil society actors have gained sufficient collective power to influence the decisions of politicians and the companies concerned. But this kind of collective power remains limited to some areas of the country and its strength can be questioned.

Till now, we have dealt with the issues related with the government regulations of different states of India, which were formulated to protect different small unorganized retailers from different big organized retailers.

In the next section we will be highlighting examples of some other countries' government regulations which have directly or indirectly helped the poor/rural/suburban unorganized retailers to sustain in the economy in the environment of immense pressure of competition given by big organized retailers.

[4] Such as having to impose a minimum INR 1000 (USD 20.5) expenditure per customer and not engaging in contract farming.

Development policies for small retailers

A paper written by Loo Lee Sim, (1999) titled "Restructuring the small-scale retail sector in Singapore," had mainly focused on the small-scale unorganized retail sector in Singapore and how this sector could be made strong to protect from emerging big organized retailers. This paper had discussed different measures, which had been carried out by governments in European countries and Japan to help the small retailers. This paper had also discussed and evaluated the various schemes and action plans undertaken by the Singapore Government to restructure the retail sector under the Retail Sector Development Plan.

It had been mentioned that Governments of many countries in Europe such as Norway, Spain, Germany, France, Belgium, Scotland etc., and Japan, had given the small retailer various forms of assistance, in terms of subsidies and grants, regulation amendment, training and retraining, and even retirement pensions. This had been done with the view that this sector has a social, as well as an economic, role to play in the community. However, the methods and the degree of support varied from country to country. For example, Government of Denmark had provided limited management consultancy, while in West Germany there was an agency for retail consulting. In the case of Norway, the most liberal Government had provided aid and subsidy to all retail businesses. Some countries' governments had even introduced some "negative" policies towards large scale retailing for protecting the small shop, for example, France, Belgium and Germany (Davies 1995) and Japan (Larke 1994; Suzuki et al. 1997).

On the other hand, various methods of support had also been provided to shift the balance in composition of the small business community away from ageing, tradition-bound and relatively unskilled retailers to younger, more innovative entrepreneurs. The success of these schemes is doubtful (Davies 1995) and not proven (Smith and Sparks 1997).

In March 1992 the Singapore government had introduced a very comprehensive package of measures in the form of the Retail Sector Development Plan,[5] launched by the Economic Development Board, to help small and medium-size retailers to restructure the small-scale retail sector. The plan had aimed to help small and medium-size retailers in surviving up with the changing retail environment, and for keeping pace with the increasing customer demands and expectations, and upgrading and improving the efficiency of their operations.

The plan had been consisted of a series of action plans to help local small and medium-size retailers to upgrade and rationalize their operation. The main provisions have been given as follows:

(1) Promoting economic grouping in the form of franchises, co-operatives and other ventures to exploit the benefit of scale economies in bulk purchasing, resource sharing and manpower training.

(2) Setting up an Enterprise Promotion Centre to provide consultancy services and direct assistance to small retailers.

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[5] The long-term aim is for local small and medium-size retailers to become viable and profitable enterprises that: (1) provide efficient and professional service; (2) adopt modern business practices and management methods; (3) enjoy economies of scale; and use information technology to improve efficiency in distribution, productivity and customer service; and (4) offer an innovative and attractive shop image and environment in keeping with changing consumer lifestyles and patterns.

(3) The sale of HDB shop units to sitting tenants to solve the problem of periodic rent increases and to give more certainty and confidence to them to make long term plans to upgrade their businesses.

(4) Liberalizing the foreign worker policy: The Ministry of Labor allows retail companies with fewer than ten local workers to qualify for one foreigner worker so long as they employ at least two local workers.

(5) Improving productivity and efficiency: The National Productivity Board will provide structured training programmes and on-the-job training for retailers and their shop assistants.

(6) Promoting computerization: The National Computer Board will assist retailers to assess their computerization needs and recommend appropriate hardware and software packages.

(7) Provide concept plans: concept plans formulated by the EDB and HDB to improve retail centres in Tampines Neighborhood Two and Toa Payoh town centre will serve as models for the development of other HDB town centres and neighborhood centres.

(8) Provide financial and technological assistance: the EDB will make available to retailers its financial and technical assistance programmes to help the sector restructure.

The provisions announced by the Retail Sector Development Plan had met with a mixed response by small retailers and have had varied achievement. Five years after its implementation, a study of small retailers in 1997 (Sim and Yu 1997) had highlighted that the most of small retailers in the HDB region centers and zones either were not aware of the various schemes or were not interested. Several retailers had not taken the advantages of training programmes, financial and technological support, and assistance to computerize their operations. The success of franchise scheme has also remained imperfect.

The study had also indicated that the bulk of the small retailers were aware of the action plans concerning the HDB Sale of Shop Scheme and the development or upgrading of the HDB centers. This is most probably because of the wide advertising of the former and the physical reflectiveness of the latter.

In 1997, within its fifth year of action the ‘Sale of Shops Scheme’ altogether had offered 16 batches of shops which constituting 7,100 shops for sale to tenants. The response was vast, with 96 per cent acceptance rate. In another study done by Wong (1998) on Clementi New Town, they showed that the ‘Sale of Shops Schemes’ were having more encouraging results in the town center than that for the neighborhood center. Many retailers in the town center had developed their shops structure and updated their retail setups. It would be very tough to gauge the exact degree of these developments caused by the ‘Sale of Shop Scheme.’ It could be said in this regards that the better locations and, hence the bigger trade areas might be an important factor for its upgradation.

Due to the above facts, many of the small retailers had also leased out their shops to chain stores which had moved from the central area to the town centers. Thus, the above study had clearly indicated that this ‘Sale of Shops Scheme’ might have remained effective in developing and advancing the retail sector situated in the town centers, but it was an utter failure in the same for the retailers situated in the neighborhood centers. Worse, many of the retailers of the neighborhood centers had faced increased expenses.[6]

As it had been already mentioned that, one of the most useful action plans was to develop or upgrade the HDB centers for providing a more pleasurable shopping environment. Due to its difficulty in implementation very few neighborhood centers including Chong Pang City, Tampines Neighbourhood Two and Clementi Neighborhood Three had taken the advantage of this scheme.

The success of the Retail Sector Development Plan requires a few retailers to take the initiative and convince the rest to agree. Though the 'Retail Promotion Centre' (an organization established in 1993 to help small retailers) had helped them, this scheme had not been succeeded. The success rates of the upgraded centers varied from center to center. Cheong (1995) had done a study on Chong Pang City, which had showed that although the business of that city was improved, the business at the newly upgraded Clementi Neighbourhood Three had remained sluggish.

Finally, the authors had concluded that 'Retail Sector Development Plan' was incomplete in its success. Though the initiatives of the plan had facilitated some of the small retailers, they were not able to solve the central problem of the retail sector, which is an overflow of low performing shops.

The authors had concluded that The Retail Sector Development Plan has limited access and they had recommended that the government should introduce schemes to encourage marginally performing businesses to exit from the retail sector so that it can be more efficient and competitive.

In a paper written by Jonah Tyan and Hui-Ming Wee (2003) titled, "vendor managed inventory: a survey of the Taiwanese grocery industry" had shown the importance of improving the supply chain competitiveness by means of strategic alliances. This paper had considered the retailer–supplier partnership through a vendor managed inventory (VMI) system. It has been highlighted in the paper that, after becoming the member of the World Trade Organization (WTO), the government of Taiwan had taken significant steps to expose of its domestic market by permitting more imports and encouraging foreign competition in the retailer business sector. As a result of this, the grocery industry had started facing unprecedented market competition. In order to improve the productivity and competitiveness of the local retail industry and consumer products industry, Taiwan government initiated a project in 1998 to facilitate the application of VMI in retail business.

Capital support for the local chains

Another paper, written by Neil M. Coe and Neil Wrigley (2007) titled "Host economy impacts of transnational retail: The research agenda," had shown how different countries government had assisted their different indigenous retail chains to resist themselves from the intense competition given by the new emergent retail TNC (Transnational corporation). It has been mentioned that the access to low cost capital is

[6] Instead of just paying rents to the HDB, they now have to contend with paying monthly installments for their loans to purchase their shops, property tax, signboard fees, etc. Owing to their poor trade catchment area, they experience great difficulty in finding buyers or tenants for their shops. Many small retailers have resorted to renting out half a shop to meet their heavier financial commitments.

one of the most important factors to the differential strength of indigenous retail chain for resistance in the environment of retail TNC (Transnational Corporation) incursion.

Reardon (2005) had indicated that the retail TNCs have access to investment funds from their own liquidity as well as from the international credit, which is much cheaper than the credit accessible to their domestic rivals. Thus the host economy government support for indigenous retail chains became very important to match that low cost capital available to the retail TNCs. Otherwise the local chains have had little option than to make partnerships or joint ventures with retail TNCs to improve their access to capital. In the environment of intense competition, if the indigenous retail chains were not being able to form partnerships or joint ventures with retail TNCs, they had to go out of market due to low cost capital constraints. For example, Reardon (2005) had outlined the case of the Chinese government making loans to its indigenous retail chains. While Faiguenbaum et al. (2002) had noted the case of national bank loans to D&S (Chile's largest retail chain) to help it and to discourage the retail TNCs from entering into the Chilean market. In contrast, in Brazil, leading food retailer CBD had formed a joint venture with French retail TNC Casino, and subsequently expanded that partnership, to help fund its continued expansion. This had happened due to the absence of government assistance in terms of capital supply (loans) to the local chains in Brazil.

Regulatory impacts

It has become clear, that the necessary fixed capital investment for the expansion of the retail TNCs had frequently made them wide-open to the powerful and localized regulatory challenges. These challenges were coming from an unstable mixture of shifts in local consumption cultures and geographies, rapid destruction of the market share of traditional channels, and the political influence of incumbent groups of local retailers and other SMEs. The various regulatory challenges which are being faced by the retail TNCs in different countries are comprised of the re-impose restrictions on proprietorship and control of retail TNCs, the land-use zoning restrictions to protect existing retail structures, and the different regulations on store-opening hours, retail formats, product imports as well as ‘below-cost’ selling. For instance, in 2006 the new military government of Thailand, with response to intense movements by the domestic retailers to limit provincial expansion by the retail TNCs (Tesco, Casino, Carrefour), had enacted some protectionist policies, which had been formulated by the ousted civilian government. Government had announced these plans to significantly tighten the legislations for limiting retail TNCs’ expansion. Before that, from the late 90s, the retail TNCs had established dominance of the Thailand market. As a result of these strict enactments Tesco, the market leader, was forced to suspend a significant part of its development programme.

CONCLUSION

From the above study it can be concluded that in the environment of intense competition, governments of different countries (including India) had helped small as well as big domestic retail chains through formulating appropriate policies over time.

The governments had helped domestic retail chains by providing capital support and/or formulating strict legislations to restrict entry of foreign retailers in their respective countries. In India, all the regulations regarding retail sector is still in state level and is being influenced by the existing political parties of different states. Thus, it varies across states and their impacts are also heterogeneous. In future, there is a need to give an effort to formulate a comprehensive regulation at the national level, which will be helpful in providing the extensive regulatory support uninterruptedly to all the weak players of this sector throughout the country.

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