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Questionnaire Survey on Apparel Firms in Iran 2010

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I. Survey Design

1. Purpose and Organization of the Survey

The aim of the "Questionnaire Survey on Apparel Firms in Iran" is: (1) to determine how garment-producing firms in Iran have established their management know-how for promoting production and sales; (2) to clarify the overall business environment surrounding garment-producing firms in Iran; and (3) to search for the possibility that Japan could play a role to develop stable business conditions for Iranian producers.

The survey was organized and conducted by Yoko Iwasaki, as part of the Need-based Area Studies Program "Middle East within Asia". Special thanks go to Ms. Farnaz Asnafi, International Affairs Manager of the Association of Iran Textile Industry (AITI, <http://aiti.org.ir>), who gave us helpful comments on the questionnaire, and arranged the necessary staff for the survey. We also express our gratitude to Mr. Mehdi Yekta, Secretary of the Iran Textile Exporters' Association (ITEA, <http://www.iranapparels.com>), for adopting the difficult task of implementing a questionnaire survey in Iran.

2. Methodology and Structure of the Questionnaire

This is a complete survey using a questionnaire to investigate Iranian private firms.

<Definition of firms under investigation>

In this survey, mid-ranking or leading garment producers in today's apparel industry based in Iran and located in Tehran province (Ostan-e Tehran) were investigated.

Since it is quite difficult to obtain accurate data concerning the value of products and sales of each firm in Iran, we should take into account the number of employees in order to determine their approximate size. If using the conventional means of categorization by Iran's official statistics, a firm with more than 10 employees is considered to be comparatively "big", reflecting the fact that the majority of industrial firms including the textile and apparel industry, have fewer than 10 employees. In this survey, this criterion was basically adopted for sizing the firms under investigation. In other words, a firm with more than 10 workers is possibly considered to be a mid-ranking or leading firm under current circumstances in Iran's apparel industry.

< Assumption of population >

Due to the serious inaccuracy and delay of officially published statistics, the numbers of firms published are often inconsistent with those actually observed. Some private trade associations such as the AITI and ITEA have more accurate and up-to-date data concerning the activities and conditions of related firms. Therefore, we based our study on the ITEA estimation in order to

assume the population¹.

According to the ITEA, there are currently approximately 250-300 garment-producing firms with more than 10 employees in Tehran province. The reason for the approximate figure is that most employ seasonal workers and the workforce often fluctuates, sometimes even below 10. We thus assume the population of our survey to be 250 as a more plausible figure.

<Distribution and Collection of Questionnaires>

ITEA initially distributed questionnaires to its own member firms, explaining the survey and requesting cooperation with the same. After a certain time, the ITEA staff then visited the firms to collect questionnaires, and encouraged further contribution if these were not fully completed.

The scope of firms investigated was gradually extended to non-member firms located in Tehran provinces, until 250 questionnaires had finally been distributed. During the survey term, which was extended once with the insufficiency of collection in mind, ITEA managed to collect 127 of 250 questionnaires by May 2010. The response percentage was 50.8%, based on the above-mentioned population assumption.

<Structure of Questionnaire>

The questionnaire was originally designed by the administration office of the Need-based Area Studies Program, as a joint questionnaire for textile and apparel firms in certain middle-eastern countries, including Iran. Some questions were modified or deleted, and new questions added in view of Iran's economic and social circumstances and technical advice from AITI and ITEA.

The questionnaire covers the following topics. (9) is a new item added to the questionnaire of this survey:

- (1) General information about the firm
- (2) Output of the firm
- (3) Capital of the firm
- (4) Financial sources of the firm
- (5) Labor and workforce
- (6) Supply chain
- (7) Main customers
- (8) Linkages with other firms
- (9) Marketing method

3. Field work

October 2009 – November 2009: Questionnaire construction and elaboration

December 9, 2009: Conclusion of the contract with ITEA

December 10, 2009 - May 15, 2010 Questionnaire distribution and collection

(The survey term was once postponed on March 15, 2010 for a further two months)

June 2010: Data entry

July 2010-November 2010 Data cleaning

¹ There were reportedly only 165 garment-producing firms with more than 10 employees operating in the whole of Iran at the time of 1386 (2007/08) according to the Statistical Centre of Iran. ITEA grasps, however, that far more than 165 firms are actually operating in Tehran province.

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