

WORKERS' VOICE REPORT 2016

The Working Conditions in Bangladesh's RMG Industry after Rana Plaza

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CONSULTING SERVICE INTERNATIONAL LTD. AND AWAJ FOUNDATION

The Workers' Voice Report 2016 is the result of a joint project of Awaj Foundation and Consulting Service International Ltd.

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II Preface

The Workers' Voice Report 2016 represents the collaboration of two organisations sharing a common vision of pushing Bangladesh's Ready Made Garment (RMG) industry towards more sustainability. Awaj Foundation, a local NGO dedicated to fighting for labour rights, and Consulting Service International (CSI) Ltd., a Hong Kong based consultancy with long-term experience in advising international brands and retailers on introducing Corporate Social Responsibility (CSR) in their supply chain, are pleased to present the third edition of the Workers' Voice Report.

After the previous reports, reactions from other organisations encouraged us to initiate a long-term project that seeks to determine trends within the RMG sector and the direction it is heading to. Progress and changes relating to Occupational Safety and Health (OSH), working hours, education or exposure to abusive behaviour in the RMG industry, amongst other indicators, will be analysed over the course of the time.

The main objective of the Workers' Voice Report 2016 is to raise awareness of the working conditions in Bangladesh's RMG industry. After the disastrous collapse of Rana Plaza in 2013, it is all the more important to take stock of the latest developments and see the industry through the lens of the workers, giving them a voice.

More than a thousand workers were interviewed between November 2015 and March 2016 by the staff of Awaj Foundation. Selected indicators provide insight into the living and working conditions of the garment workers interviewed. Workers' Voice is meant to counter the continuously soaring export earnings of a thriving economic sector with the workers' perceptions of their industry, their aspirations and their motivation to continue enduring often unacceptable working conditions.

With this third Workers' Voice Report, we also would like to remember the late Khorshed Alam, Executive Director of the Alternative Movement for Resources and Freedom Society (AMRF). Korshed was closely involved in the first edition of the Workers' Voice report and devoted his entire life to workers' rights and a just minimum wage legislation, which would give the workers dignity and a chance to participate in society. We will honour his memory forever.

III The Workers' Voice Project Partners

Awaj Foundation is a Bangladeshi Non-Governmental Organisation established in 2003. Awaj Foundation aims to improve the livelihood of workers through legal rights counselling, trainings on workers' rights, occupational safety and health, as well as hygiene and reproductive health. Awaj Foundation seeks to build a bridge between the workers and the factory management in order to secure legal rights and better address the workers' needs.



Consulting Service International Ltd. (CSI) is a CSR consultancy established in 2004 and based in Hong Kong. Engaged in all major Asian markets, CSI organises, designs and implements CSR projects, capacity building programs for factories, value chain analyses, and events such as workshops and conferences. CSI works with brands, manufacturers, government organisations and local NGOs to sustainably develop Bangladesh's garment industry.



1 Introduction

The first Workers' Voice report published in 2013 was much influenced by the collapse of Rana Plaza, killing 1,134 people and leaving many more injured. Rana Plaza was the apex of a series of fatal disasters leading many to believe that Bangladesh's garment industry was at crossroads: it could either continue the devastating race to the bottom or get businesses to take on responsibility for their working conditions, going for systemic change and substantial improvement.

However, economic data keeps telling a success story of Bangladesh's Readymade Garment (RMG) industry: it comprises approximately 5,000 factories and employs over 4 million workers, approximately 80% of whom are female. Readymade garments and knitwear made in Bangladesh account for 85% of the country's export earnings, amounting to more than 28 billion USD in 2014. The Gross Domestic Product (GDP) growth rate of annually 6% is basically driven by exports, i.e. the RMG sector. Bangladesh has greatly benefited from the Multi-Fibre Arrangement (MFA) that imposed quotas on textile and garments exports of competing developing countries until 2004 and a preferential access (General System of Preferences) to EU and US markets thanks to its condition as a least developed country. Such supportive measures led to a massive expansion of production capacities, while labour costs have been squeezed, putting the country at advantage and consolidating its status as an alternative sourcing destination to China for the low and lower-mid market segment. With new buyers joining in the supply chain, the industry is slowly moving up the value ladder. As producers supply large quantities to global brands such as H&M, the Inditex Group and other large retailers that underlie closer observation by end consumers, international NGOs and the media, the pressure to meet international labour standards and to raise the bar of corporate social responsibility increases. However, buyers, regardless of their size, often fail to ensure compliance with national and international requirements.

The importance of the RMG sector as the biggest export earner and the largest employer of manufacturing industries for Bangladesh is striking but presents risks to long-term economic stability. The massive dependence on one industry is the major driving force for low wages and lax regulations, which currently make up the country's competitive advantage. There are many who argue that the lack of a vertically integrated supply chain weighs on the cost structure of labour-intensive garment manufacturing and forces Bangladesh to compete on labour costs. The oversupply of unskilled labour enables businesses to take advantage by setting the lowest wages possible. Results from the last Workers' Voice report provided evidence of poor working conditions in Bangladesh's RMG factories, where long working hours, forced overtime, and wages that often fail to meet a legally set minimum prevail.

This report seeks to take stock of the developments over the last three years. Drawing on a survey with more than 1,000 workers from over 300 factories, it aims at identifying continuities and discontinuities with regard to the findings in 2013. Despite the magnitude of the survey, it can just provide a glimpse of the complex conditions in Bangladesh's RMG industry.

2 After Rana Plaza: Policy Developments Since 2013

The fate of Bangladesh is inextricably tied to the RMG sector, which is the major employer in manufacturing industries and the largest export earning sector. The national government nurtures this dependence by adopting supportive export and import policies. As imports are heavily taxed, unless the imported product is re-exported as an input, the RMG industry receives generous tax incentives (e.g. tax holidays for investors, bonded license, export subsidies, etc.).

Little has been done though to safeguard the workers' rights during the bonanza of the last two decades. With labour regulations and inspections failing to enhance the implementation of labour rights and to ensure safe working conditions, only a series of fatal disasters compelled the national government and international stakeholders to launch initiatives that address the issue of fire and building safety in Bangladesh. Since late 2013, a number of positive developments have been initiated as follows:

At the national level, the minimum wage was raised from 3,000 BDT to 5,300 BDT (approx. 49 EUR) per month in 2013 after it had been increased from an extremely low level of 1,662.50 BDT (approx. 17 EUR) to 3,000 BDT (approx. 33 EUR) in 2010. It is still one of the lowest minimum wage levels in the garment manufacturing world.

Labour laws were amended to strengthen Occupational Safety and Health (OSH). The number of inspectors have been increased and trainings have been provided and expanded by the ILO. It is crucial to establish monitoring tools to assess whether all faults have been remediated and a credible labour inspection system is in place. Rana Plaza demonstrated that unionisation is critical to ensure labour rights. One can assume that if any of the workers killed had been unionised, more likely they would have been able to confront their supervisors and employers to not enter the reportedly unstable factory building. Since 2013, the national government has been facilitating to make the process of registering a trade union more transparent (see NTPA below). However, there is more progress needed from national law and law enforcement to ensure the workers' rights to freedom of association and collective bargaining are respected.

The Government of Bangladesh along with employers' and workers' organisations adopted the National Tripartite Plan of Action on Fire Safety and Structural Integrity (NTPA), focusing on bettering the conditions for unions to register, for workers' to establish adequate representations, and of OSH. The NTPA has achieved to increase the number of labour inspectors substantially. Moreover, the National Occupational Safety and Health Policy was adopted in October 2013 for both sectors formal and informal. Within the responsibility of NTPA fell the rehabilitation and compensation for Rana Plaza survivors.

As a joint project between the Government of Bangladesh (GoB) and the International Labour Organisation (ILO) 'Improving Working Conditions in the Ready-Made Garment Sector' (RMGP) was meant to provide a more comprehensive approach to improve working conditions. The main pillars of the programme are building and fire safety assessments, labour inspection reforms, occupational safety and health, rehabilitation and skills training, and the

launch of Better Work Bangladesh. Comprehensive training courses and education programmes are expected to increase the capabilities of workers, supervisors and factory management in the abovementioned areas.

At the international level, several programmes were initiated. The Bangladesh Accord on Fire and Building Safety is an initiative of more than 200 international brands and buyers, two global trade unions, and several Bangladeshi trade unions that oversee the fire and building safety in the factories. 'The Accord' is legally binding and places pressure on brands and producers to pay heed to and implement corrective action plans.

Fire and building safety is also the main concern of the Alliance for Bangladesh Workers' Safety, a multi-stakeholder initiative driven by North American brands and retailers. To reduce injuries and fatalities, 'the Alliance' aims to enhance worker safety by equipping factories better, providing education to workers and management, empowering workers, and building institutions that enforce and maintain safe working conditions in the factories.

The EU Sustainability Compact is a tripartite agreement between the EU, the Government of Bangladesh and the ILO. The compact focuses on three areas: i) labour rights with the right to collective bargaining and freedom of association; ii) occupational safety and health including structural integrity of the building; and iii) corporate social responsibility in the RMG sector.

The Rana Plaza Arrangement established the Rana Plaza Donors Trust Fund to collect the contributions from global brands that had had orders with at least one of the five garment factories in the Rana Plaza building and the Rana Plaza Coordination Committee to oversee the compensation process. Local and international NGOs were campaigning for more than two years to pressure the multi-national companies to contribute to the fund.

Despite these very positive developments, the programmes outlined above either failed to address working conditions systemically or only focused on first- and second-tier suppliers of global buyers. The Accord, the Alliance and the NTPA carry out assessments for structural integrity and aim to reduce the risks to OSH in the factories. They fall short in improving overall working conditions.

Challenges remain to adjust local labour laws to international standards and to effectively enforce them. Only systemic changes in different policy areas can avoid compensating structural weaknesses with low labour costs.

Poor infrastructure, for instance, weighs on the industry's competitiveness. Unreliable electricity supply requires back-up generators to limit negative effects of load-shedding. The country's mobility is abysmal due to the overstretched capacities of an insufficient roads network. Particularly, the connection between Dhaka, Bangladesh' manufacturing centre, and Chittagong, the country's major port, often suffers from disruption due to traffic congestions. While these structural weaknesses continue to burden local enterprises feeding into the global supply chain, labour costs are maintained on a low level to avoid further negative effects on the cost structure and the industry's competitiveness.

Even though the legal minimum wage was lifted to 5,300 BDT in 2013, the amount is still insufficient to meet the basic needs of the workers and their families. Bangladesh's RMG industry pays far below what is considered a living wage and collective bargaining is not ensured at the sectoral level yet.

Brands and retailers are critical to the progress of developing overall working conditions. They face risks for their business if fire and building safety is not improved. Disasters with a large number of fatalities can affect and even damage brands. Non-compliance with labour standards resulting in excessive working hours, low wages or diseases from hazardous production processes has no immediate impact on the workers' lives and thus produce only minor media coverage in western consumer markets. Hence, the reputational risk for brands and buyers is lower too. The fundamental mismatch between the tremendous export earnings and the working conditions needs to be addressed if the industry wants to become sustainable and move up the value chain. Despite some positive developments since Rana Plaza, we must ask, what has changed for those who are the actual addressees of these policies: the workers.

What methods we applied to answer this question will be outlined in the following section.

3 Methodology

This report presents the results of a survey conducted between November 2015 and March 2016 with over a thousand workers in the RMG sector. The questionnaire used in this study was designed by Consulting Service International Ltd. in collaboration with Awaj Foundation.

3.1 Standardised questionnaires

The survey underlying this report draws on a total of 1,007 standardised questionnaires. Face-to-face interviews were conducted with RMG workers in different centres operated by the Awaj Foundation. Garment workers frequent Awaj Foundation for different reasons, for instance, to visit the doctor, to rest and chat with other workers or to take part in training sessions. The location ensured an environment devoid of negative influences of employers, supervisors or any other by-standers.

Questions were asked regarding the reasons for joining the garment industry, the perception of the workplace environment, working conditions, and personal information. After verifying the validity of the questionnaires, data were entered into SPSS, a statistical data software, and processed and analysed with SPSS and MS Excel. Open answers were categorised and coded for interpretation.

The database generated from the questionnaires was analysed for statistical trends and significance of specific variables as well as correlations between two or more variables. Qualitative information was used to understand and to explain unusual patterns of quantitative information, lack of information and apparently contradictory information. Semi-structured open-ended questions complemented the standardised questionnaire to give account of individual motivations. They provide insight into the opinions and experiences of garment workers. These answers are often unexpected and thus richer in quality, whereas statistical analysis is usually more complex.

Tables and figures included in this report highlight selected survey findings and are expressed in percentages. The terms 'respondents', 'participants', and 'interviewees' are used interchangeably for the subjects of this survey: the workers.

3.2 Limitations

The sample selection process for the quantitative survey did not exclusively refer to random data for statistical analysis. The survey was conducted with garment workers visiting the Awaj Foundation in and around Dhaka. Chittagong, another major destination of garments production, was not included in the survey for practical reasons as the Awaj Foundation is not represented there. Workers outside the Awaj Foundation network were not interviewed. Underage workers and workers living far away from their workplace are not assumed to visit labour rights organisations such as Awaj Foundation after work and thus are sparsely

represented in the sample. Consequently, the following descriptive analysis is not necessarily representative of all workers in the factories visited nor of Bangladesh's RMG sector in general, but describes the key characteristics of the workers interviewed.

Although the Awaj Foundation is a safe place for workers, self-censorship to avoid any conflict with their employers cannot be totally ruled out. A low level of education and limited exposure to realities outside their workplace and home sometimes created comprehension problems, so that questions had to be reformulated. Given the setting at Awaj Foundation, bystanders, such as other workers, influencing each other's answers could not be fully prevented.

The next section portrays the findings of this study based upon the methodology outlined above.

4 Results of the Survey 2015-16

The Workers' Voice Report 2016 uses survey data from interviews with 1,007 workers that were taken in 2015/2016 to evaluate the working conditions in 333 textile and garment factories in Bangladesh. It particularly looks into the changes since the last report in 2013, which serves as a reference for the labour conditions in Bangladesh's RMG industry before and shortly after Rana Plaza. Wherever possible, it evaluates gender differences for the indicators set out below.

4.1 Gender

Women are the backbone of Bangladesh's RMG industry. Official statistics revolve around 80% of the RMG workforce being female. Garments is the only industry in Bangladesh that offers large-scale formal employment to unskilled females. Other income opportunities are often considered as physically more demanding (e.g. tanneries) and thus less desired. 85% of the sample's respondents were female, thereby slightly exceeding the upper bound of the high industry average.

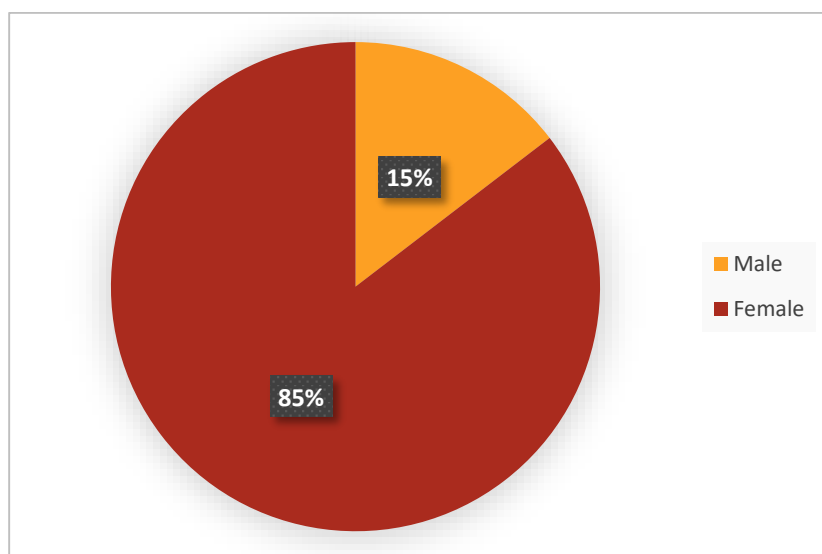


Figure 1: Distribution of respondents by gender

The reason for the higher number of female workers among the respondents compared with the Workers' Voice Report from 2013 (69%) can be found in the final selection of interview partners. As then and now sweater and textile factories, which traditionally employ a larger number of males, were included in the surveys, this cannot be the reason for the lower participation of male workers in 2016. Instead, it is believed that women rather than men seek support with labour rights centres such as Awaj Foundation as they face gender-specific

discrimination and thus require more advice to overcome challenging working conditions. Moreover, several interviews were taken in Women Cafés run by Awaj Foundation.

Bangladesh's employer organisations usually sell the gender disparity as a story of successful empowerment of women. Even though it is true that women have gained importance within their family by adding to their household income, they remain highly vulnerable. Section 4.13 will expand on the issue of female exposure to verbal and physical abuses by the predominantly male factory management and line supervisors, taking advantage of their position of power.

Garment workers only slowly start organising unions, in which women traditionally have been underrepresented as members and in leadership. Thanks to their large participation in the workforce, women now have the opportunity to spearhead the trade union movement, learning skills to represent their interests and to fight for labour rights.

4.2 Age

The surveys of 2013 and 2016 indicate that the age structure of garment workers has changed to some extent over the last three years. Almost half of the current workers (47%) interviewed were aged below 23, which is somewhat less than in 2013 (53%) when the median age was 24.63 years. About 30% of this study's respondents were aged 24 to 28; less than a fifth were between 29 and 39 years old. Bangladesh's RMG industry used to be criticised for exploiting underage workers. As a result of the methodological approach, it can be assumed that child workers are less inclined to frequent organisations such as AWAJ Foundation and thus are underrepresented in this study¹. The current sample identified only 1 worker younger than 16 years and 4% below 18 years; in 2013, 1.5% of the workers were below 18.

In view of the dominant role the female workforce plays in Bangladesh's RMG sector, it is notable that male workers were comparatively younger than their female counterparts. 55% were aged 23 or below as opposed to only 47% of the female workers. In 2013, only 38% of the male workers were found in the youngest age groups².

¹ Child labour is work that exceeds a minimum number of hours of economic or domestic work from the age of 5 to 17. The Labour Act Bangladesh enacted in 2006 prohibits employment of children under 14 years as well as hazardous forms of child labour for persons under age 18. There is an exception though that children aged 12 and above are allowed to engage in "light work" that does not pose a risk to their mental and physical development and does not interfere with their education.

² The result is statistically not significant ($p > 0.5/1.0$), which means it could have occurred randomly.

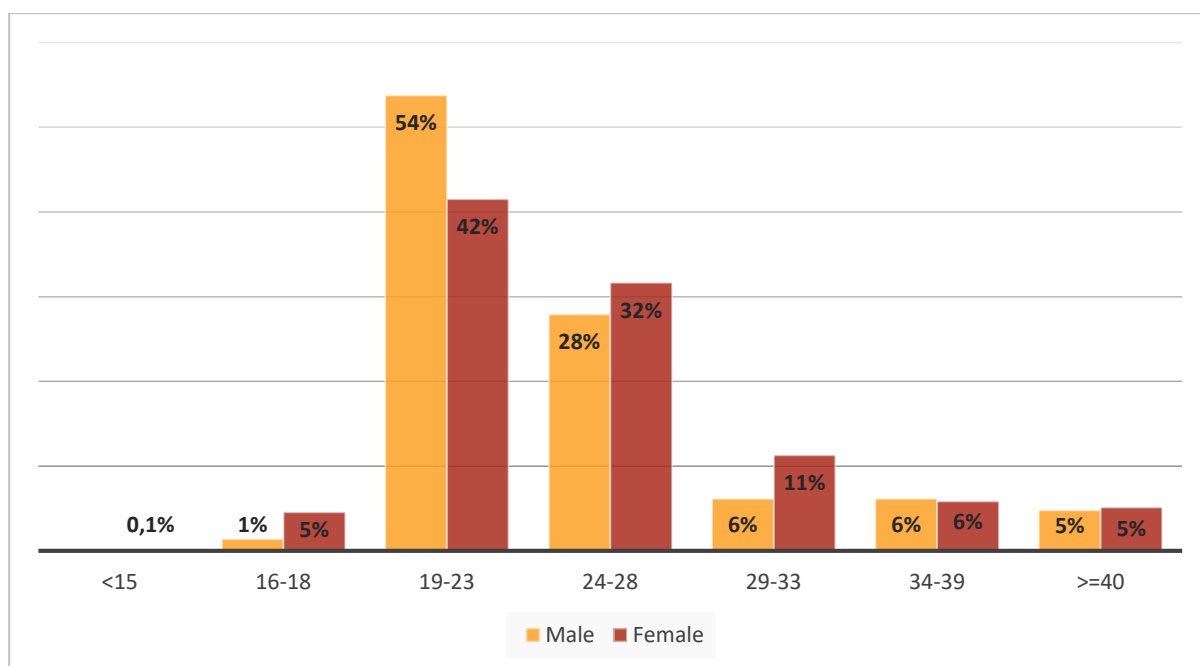


Figure 2: Distribution of respondents by age and gender

In any case, the respondents were aged predominantly below 23 which implies a high employee turnover in Bangladesh's RMG industry. Factories prefer to hire young women before they become pregnant, so as to avoid sick leave, maternity benefits and an assumed decline in productivity. Pregnancy-based discrimination is one form of abusive behaviour, which will be expanded on in section 4.12 (Exposure to Abusive Behaviour). The factory management in Bangladesh's RMG industry is often unaware of the adverse impact of high employee turnover on product quality and productivity. Moreover, they are often unable to provide a stable environment with good working conditions including child care facilities and maternity leave which makes workers want to stay.

4.3 Marital status

Marriage is an important life-cycle event in a traditional society such as Bangladesh which can influence the decision to leave a factory. 68% of the respondents were married, 29% were single; only 2% were divorced and 1% widowed. Figure 3 shows that almost three-quarters of females were married, while 27% were still unwed. In contrast, only just over 50% of male workers lived in marriage.

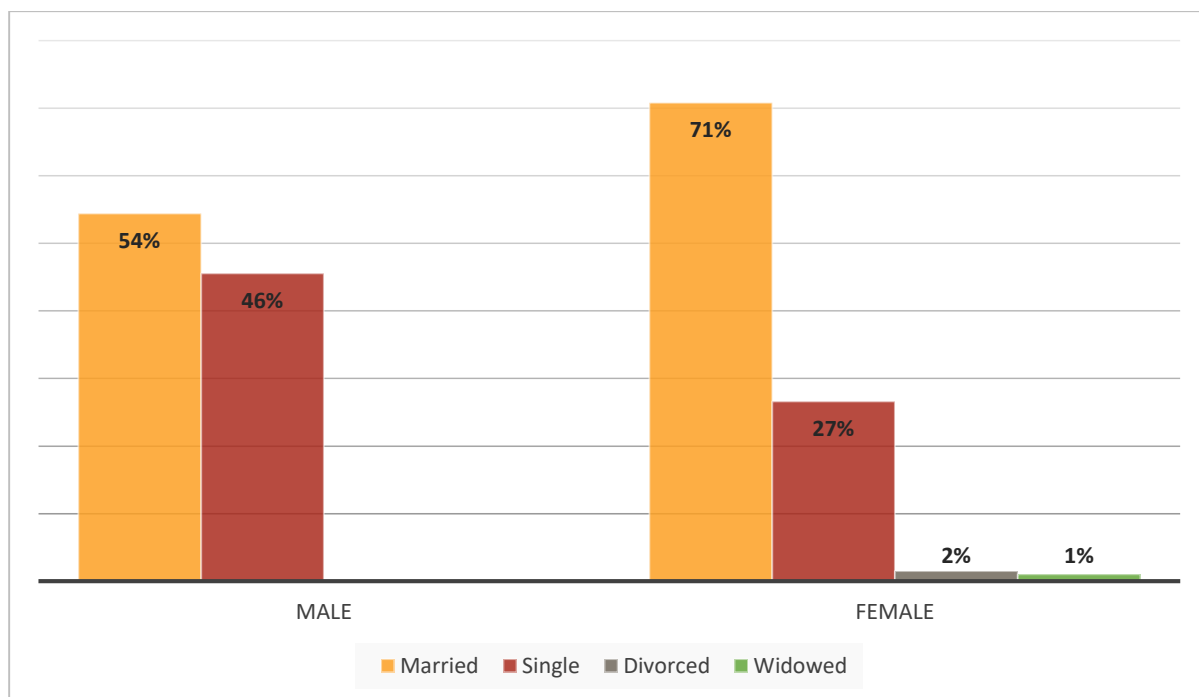


Figure 3: Distribution of respondents by marital status and gender

Research on labour migration, marriage and women’s employment shows that female garment workers delay marriage for work. Arguably, as will be set out later, the decision for women to migrate to large urban centres like Dhaka or Chittagong for work bears many implications for living arrangements. Accommodation and financial contributions to their families in rural areas create financial pressure on the workers to save money, work overtime and delay decisions on marriage and starting a family.

Section 4.2 already touched upon the industry’s inclination to employ young women as marriage has an impact on the employee turnover rate. Data from this survey and information from other reports suggest that employers do not want to keep female workers when they marry; instead, they recruit new workers at lower wages, ignoring the efficiency of a trained worker. However, women who are married and have children usually are interested in keeping a secure job. This finding again calls for factory owners to create a favourable working environment that allows women to better combine work and family, for instance, by child day-care facilities.

4.4 Children

To reconcile work with family life should be an issue of growing importance in Bangladesh’s RMG industry given the long working hours by a majoritarian female workforce. More than half (55%) of this study’s respondents and even 78% of the non-singles had children. Figure 4 highlights that 42% of the non-single garment workers had one child, about two-thirds had one or two children. Only a very low percentage exceeded the constantly decreasing national

fertility rate of 2.21 births per woman. There has been no significant change identified in comparison to the survey of 2013.

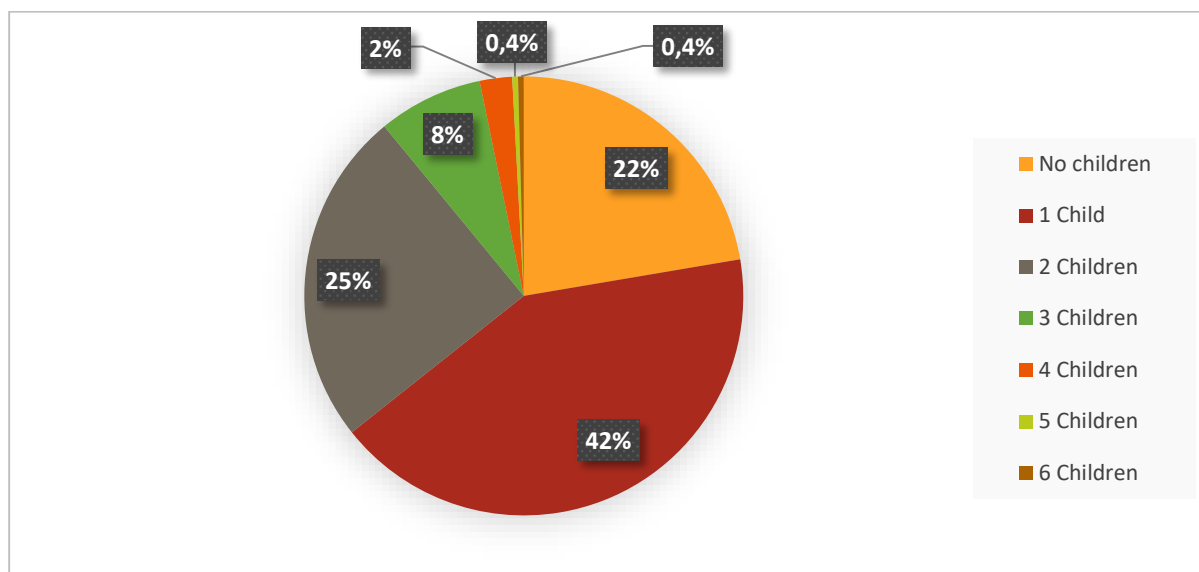


Figure 4: Distribution of non-single respondents by number of children

Looking through the gender lens, 80% of the female workers interviewed had children as compared to only 63% of the male workers. In 2013, the values were lower (71% vs 54%). Women marry earlier than men and also tend to have children at a younger age. However, factories neither are equipped with the facilities for working parents nor are workers aware of a lack of such infrastructure. Business associations like to emphasise that women in Bangladesh's traditional society have been empowered by their employment in the RMG industry. It is true that women have greatly benefitted from the country's rise as a manufacturing centre of the global fashion industry. Yet real empowerment would mean for employers to provide maternity benefits and child care facilities to all working parents that cannot rely on family or friends. Women would benefit most. In general, the term 'empowerment' is to be carefully used when it comes to women workers in the garment sector. Often, income is their only benefit and outweighed by systematic discrimination and abuses at the workplace (see Section 4.12 'Exposure to Abusive Behaviour').

4.5 Education

Education is critical to Bangladesh's RMG sector in general and to the personal development of the workers in particular. The labour-intensive garment industry is based on a low-skilled workforce producing for the lower and lower-mid market segment. Garment workers usually come from poor families and had no access to or have been deprived of adequate education. They earn a living by learning on the job. In Bangladesh, the level of education varies with the

gender, although the gender-education gap is less pronounced among workers of the garment industry.

The percentage of workers without even one year of formal schooling decreased from 17% percent in 2013 to 6% in 2016, which is very low compared with the literacy rate of the general population of Bangladesh (61.5%). Despite these encouraging news, the gender-education gap is undisputed. Figure 5 shows that male workers generally have acquired more years of schooling and degrees than female workers, 40% of which did not study beyond the primary level. The gender divide widens the higher the education: 21% of the male respondents ended school with the Secondary School Certificate (SSC), doubling the female share. Even 6% of the male workers held a Higher Secondary Certificate (HSC), whereas only 1% females qualified for higher education. 2% of the male respondents were entitled to enrol in a master's degree course, whereas only 0.1% female workers were holding a bachelor degree.

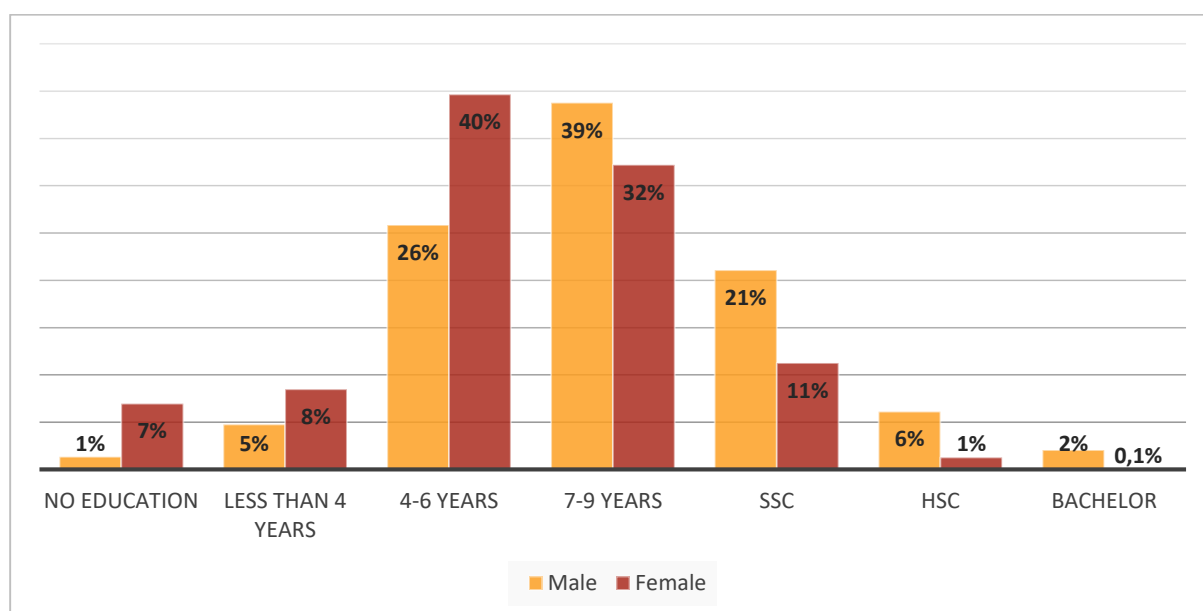


Figure 5: Distribution of respondents by years of schooling and gender

The last Workers' Voice Report already highlighted financial problems (approx. 34%) as the major driver for entering the garment industry, followed by domestic problems (approx. 25%) and marriage (approx. 9%). Results from this sample presented in Figure 6 point to an increase of early marriages and to a slight decrease of domestic problems. The major reason to leave school for work are still financial issues (39%). From the increasing value it is inferred that juniors are expected to contribute more to the household income and that early marriages seem to be on the rise. Some female workers had left school and started working in order to avoid an early marriage. It is widely acknowledged that garment manufacturing enables female workers to postpone the age of marriage and childbirth. Early marriage is understood to have a detrimental effect on the level of education and future job opportunities as social conventions

impose a family-centred approach. In this light, the garment industry certainly has a favourable effect on the empowerment of women.

Domestic problems, for instance, may refer to family breakups if the single or main earner leaves the family, imposing responsibility on the sons. Figure 6 is also an expression of the fact that the majority of the workers interviewed left school early. Few of them make up for their lost education and start studying in their free-time (for more information, see Section 4.15 'Activities Outside the Garment Factory'.

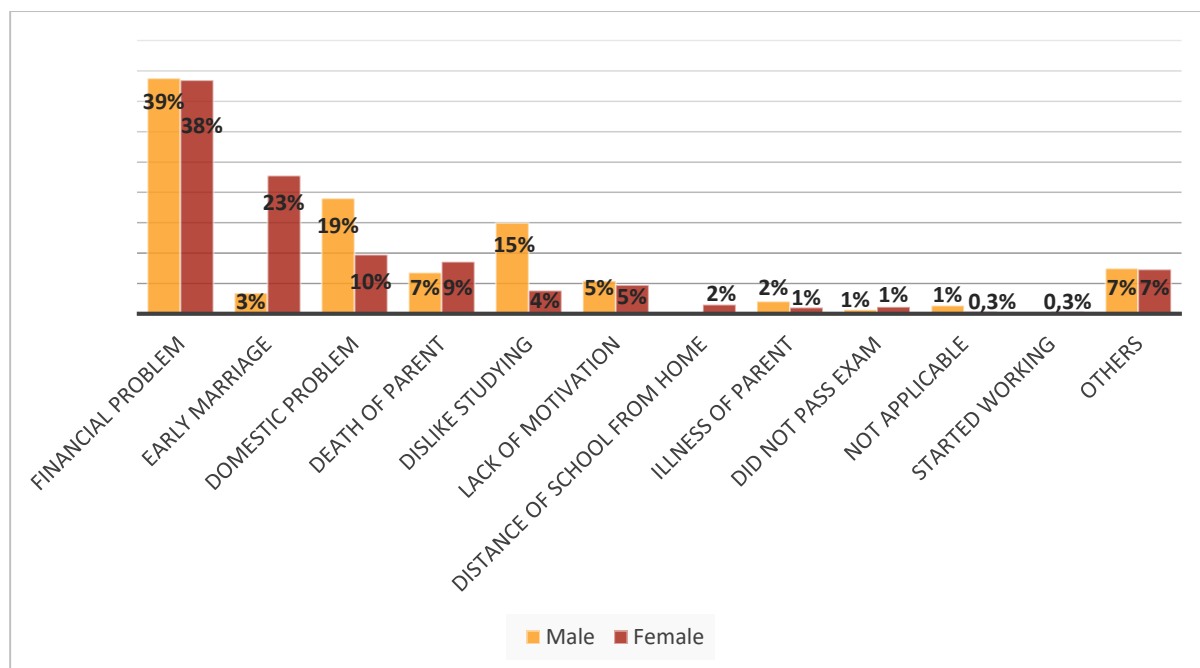


Figure 6: Distribution of respondents by reasons for not attending school/school drop-out and gender

The RMG sector has been the engine of the country's economic growth thanks to millions of mostly uneducated workers for whom it provides employment on a very large scale. Disasters such as the collapse of Rana Plaza or the Tazreen fire have implications for labour inspections and for the workforce which requires skills development and education in OSH. Working conditions can only be improved if workers are aware of critical conditions at their workplace. Apart from the positive effects that skills development has on the society, educated workers are able to carry out more complex processes and activities that result in more valuable products making Bangladesh's RMG sector move up the value chain.

The workers interviewed by Awaj Foundation mostly carried out low- or unskilled activities. 60.1% of the female respondents were shop-floor operators in comparison to not even half of the male workers (see Figure 7). More skilled operations were usually carried out by men. 18.4% of the male respondents controlled quality in comparison to only 9.9% female workers. No woman interviewed was engaged in ironing and folding clothes, while 13.6% of the male

workers were qualified to carry out such activities. Except for slightly more female helpers than in 2013, there is little difference to the last Workers' Voice Report.

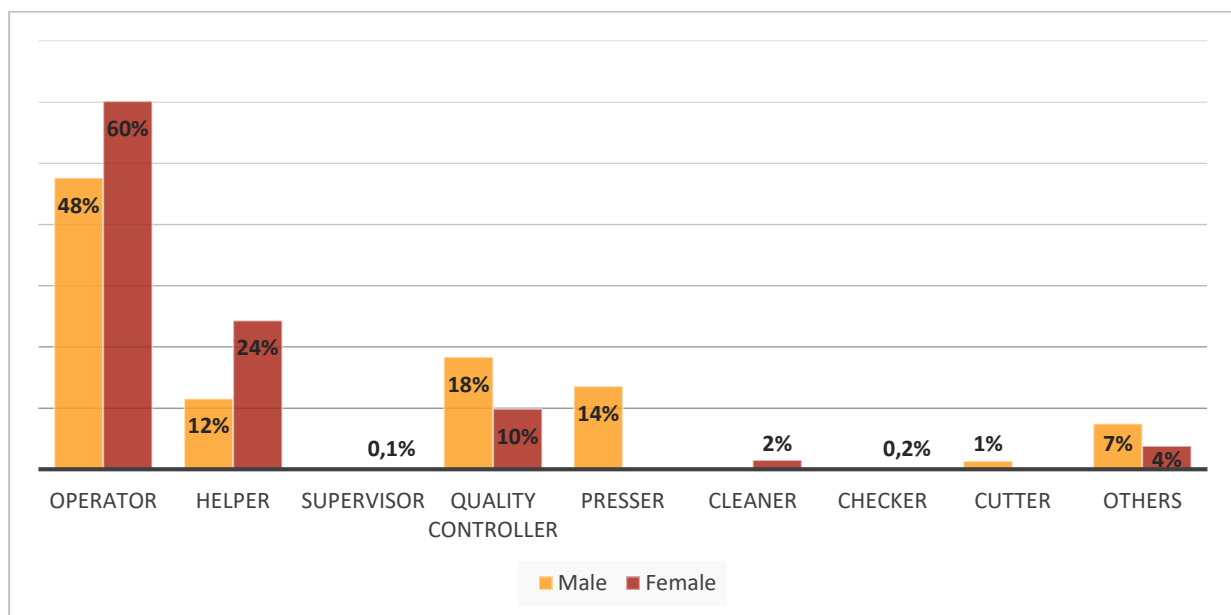


Figure 7: Distribution of respondents by designation and gender

It is important to keep in mind that more qualified workers such as supervisors are less likely to visit organisations that advocate labour rights, such as Awaj Foundation. Moreover, the principle of seniority is firmly anchored in Bangladesh's traditional society, so that workers of different ranks rarely mingle.

In sum, financial constraints and early marriage were the main push factors for the workers to drop out from school and to join the RMG industry. Most of the workers maximally complete 9 years of school, only a few have SSC or HSC degrees. The analysis on wages (see Section 4.8) will show whether education has an influence on the income of garment workers.

4.6 Driving forces for joining the RMG sector

The reasons young women and men choose to work in the RMG sector basically break down to economic constraints (see Figure 8). Particularly women were expected to support family matters, almost two-thirds joined the garment industry for this reason, while men are often allowed to start their own family, which may explain that less than half of the male respondents sent money to their families. However, by contributing to the household income, women have gained social recognition. The garment industry provides low-wage employment to a large number of people from poor backgrounds, creating a highly competitive working environment. Even though conditions are fierce, it is the only manufacturing sector that provides job

opportunities for a lowly educated workforce with few years of schooling and a regular income. Lack of education and lack of employment opportunities in the area of origin are important push factors to work in the RMG industry (see Section 4.5). By contrast, individual desires such as “to support myself” or “to have a better future” were barely mentioned. To only 6% of the male workers the garment industry provided better facilities than other employments as, for instance, they could get and learn jobs in the garments industry easily, could reach higher positions and received their salary in time.

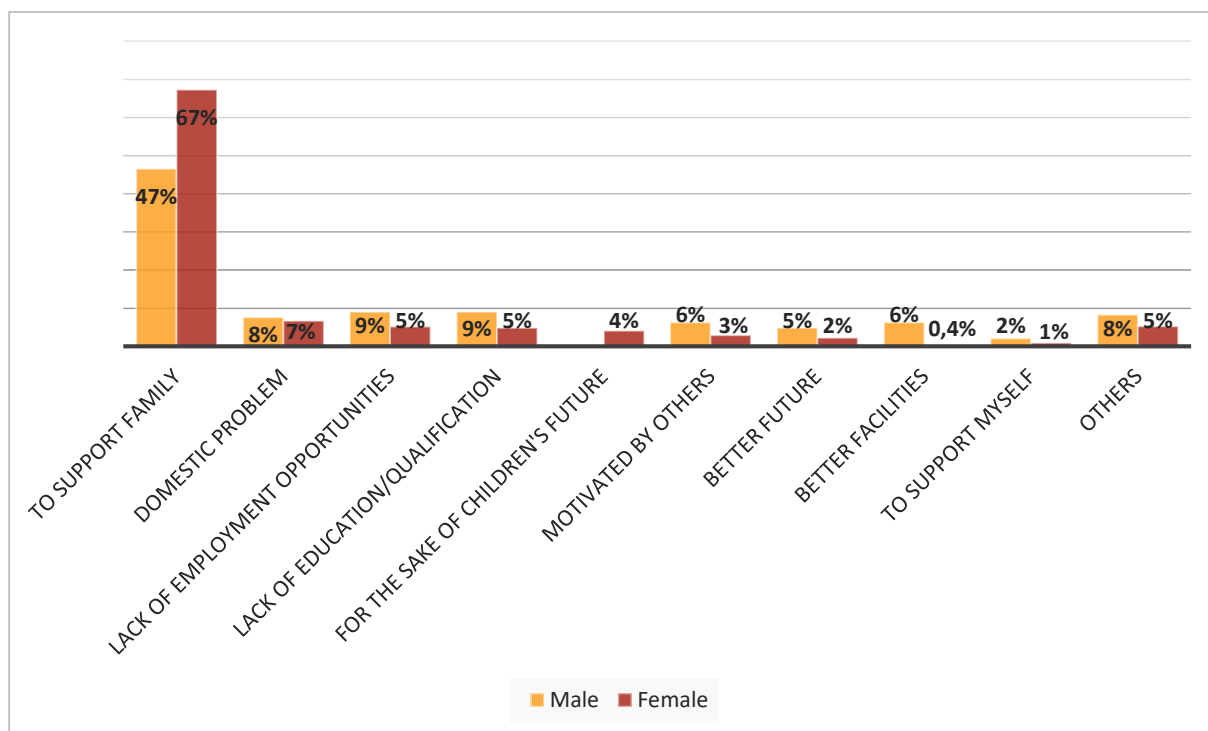


Figure 8: Distribution of respondents by reasons for joining RMG industry and gender

Results from 2013 point to a remarkable change of work conditions in current RMG factories. Then, the garment industry by far was believed to provide better facilities than other economic sectors (30%). Domestic problems, lack of education/qualification and family support followed suit, each of which revolving around 20%. The different nuance of responses in 2016 implies that family matters have dramatically gained importance, while the industry itself has lost its appeal as an attractive employer. If this assumption holds true, government and employer organisations need to provide better working conditions and effective enforcement mechanisms to establish an attractive industry.

4.7 Work experience

Sections 4.2 and 4.5 already showed that garment workers generally are young and face few entry barriers to manufacture clothes. Figure 9 presents 20% newcomers among the respondents with a work experience of less than 2 years in the RMG sector³. More than half of the respondents are spending between 2 to 5 years in the industry. With 19% having acquired between 6 to 10 years and only 9% with more than 10 years, there are relatively few long-term experienced garment workers among the respondents. The most striking difference in comparison to the survey from 2013 was that the percentage of workers with 2-5 years of experience increased from 33% to 53%, whereas those working 6-10 years dropped by 18%. This means that the RMG workforce is getting younger and less experienced, which makes them more vulnerable and thus more easily replaceable.

The type of work may give additional indications for diminishing experience. Sewing machine operators generally sit for long periods, while clippers or pressers spend many hours on their feet, often working at non-adjustable tables. Such work is hard to carry out for a lifetime. Another reason could be marriage. The majority of garment workers is female and is expected to move back to their home district to marry and devote themselves to family matters.

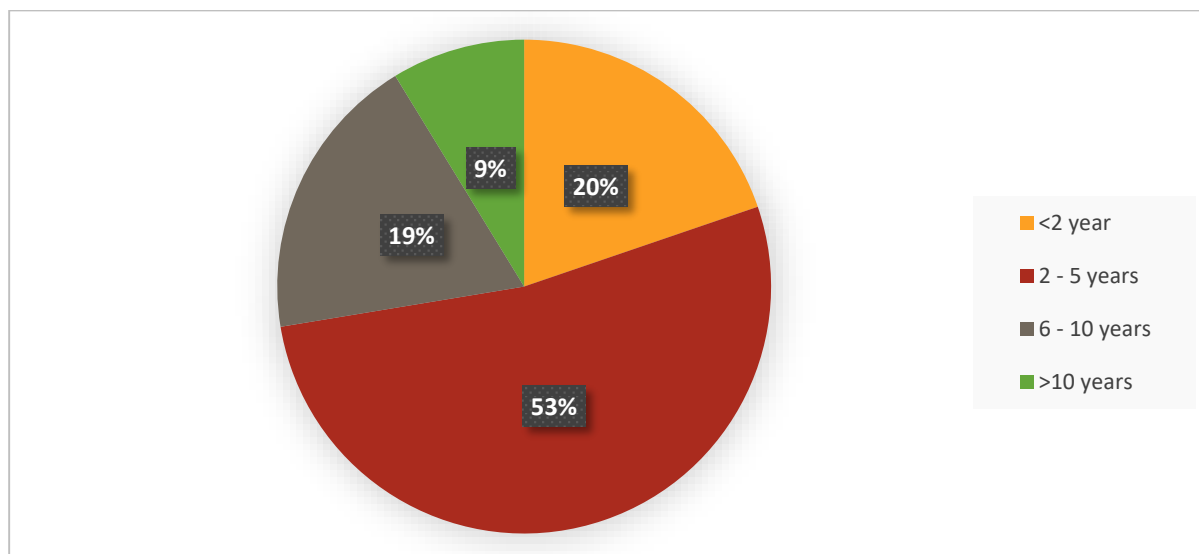


Figure 9: Distribution of respondents by years of experience in RMG industry

The scenario is even more pronounced considering the workers' experience in their present factory. The majority of the workers (in total 46%) were working for less than 2 years in the factory they were employed during the interviews. In this group, males (56%) seemed to be more loyal to their current employer than females (45%; see Figure 10). Only slightly fewer (in total 45%) were working for 2 to 5 years in the same factory; here, women were stronger

³ In this case, gender difference in terms of work experience in the RMG sector is negligible.

represented than men. The results point to a relatively high degree of employee turnover without having a clear bias towards either gender. However, there are studies arguing that job dissatisfaction and the intention to leave is greater among male than female workers.

In Bangladesh, there is no infrastructure yet to attend vocational trainings before taking on responsibilities as an operator. All activities can be trained on the job by more experienced employees, so there is only little qualification and limited training periods needed. These conditions allow for a quick change within the RMG sector. As the operators gain experience within the same company, they are assigned more complex operations, which is basically the only chance for promotion. Apart from very few operators becoming line supervisor, there is little chance to improve skills beyond machine operations.

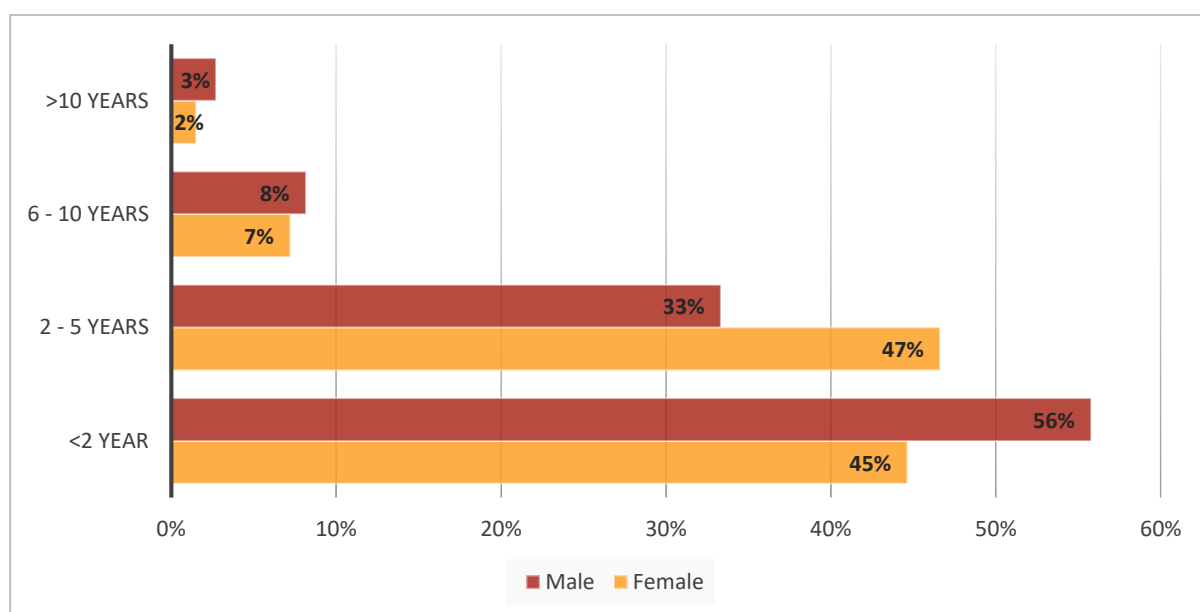


Figure 10: Distribution of respondents by years of experience in present factory and gender

The data presented in Figure 11 allow to conclude that factory fluctuation or employee turnover to some extent are an issue. 40% of the respondents worked in only one factory, while 31% have gathered work experience from two factories. These findings are basically conform to the survey from 2013. It was rare for garment workers though to change their workplace more than three times. The major reason for employee turnover is job dissatisfaction. Several studies found that work-life-balance, upward mobility and routinisation are key factors for leaving the job, while payment is not central to that decision.

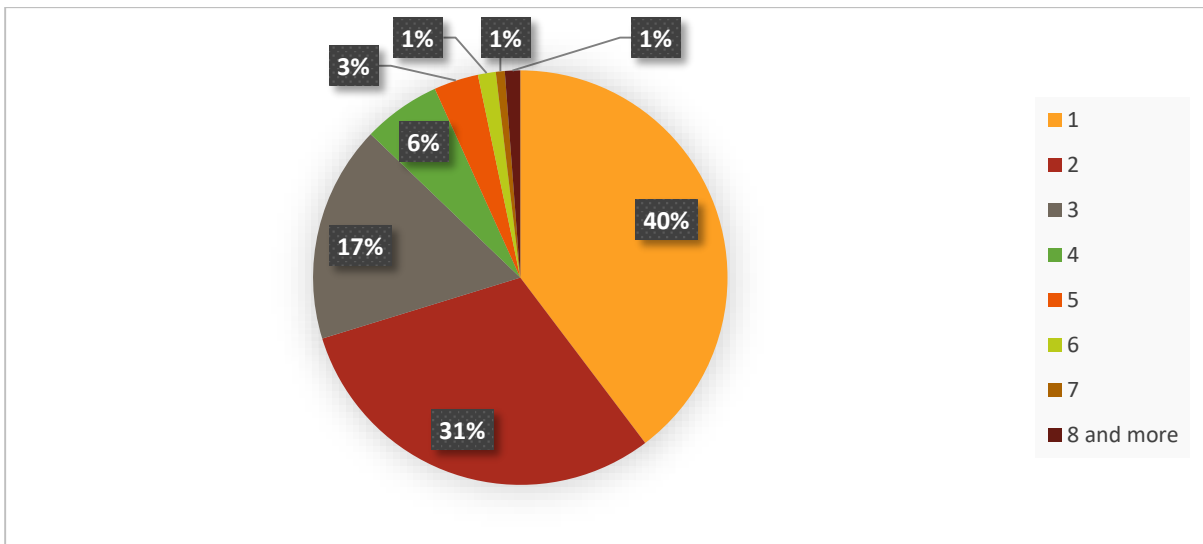


Figure 11: Distribution of respondents by number of factories worked in

When correlating the number of factories with the work experience in the sector (see Figure 12), there is evidence that the first two years were usually fulfilled in only one factory (80%). This value increased by more than 10% in comparison to the survey from 2013. Then, more than 20% of workers with more than 10 years of work experience were still loyal to only one factory.

It is fair to conclude that workers gained more experience in different factories with different operations, but also became less loyal over the course of time. The more experience they acquired in the industry, the more mobile they became. Naturally, this demand for work in the garment industry can be met by a supply base of approximately 5,000 factories.

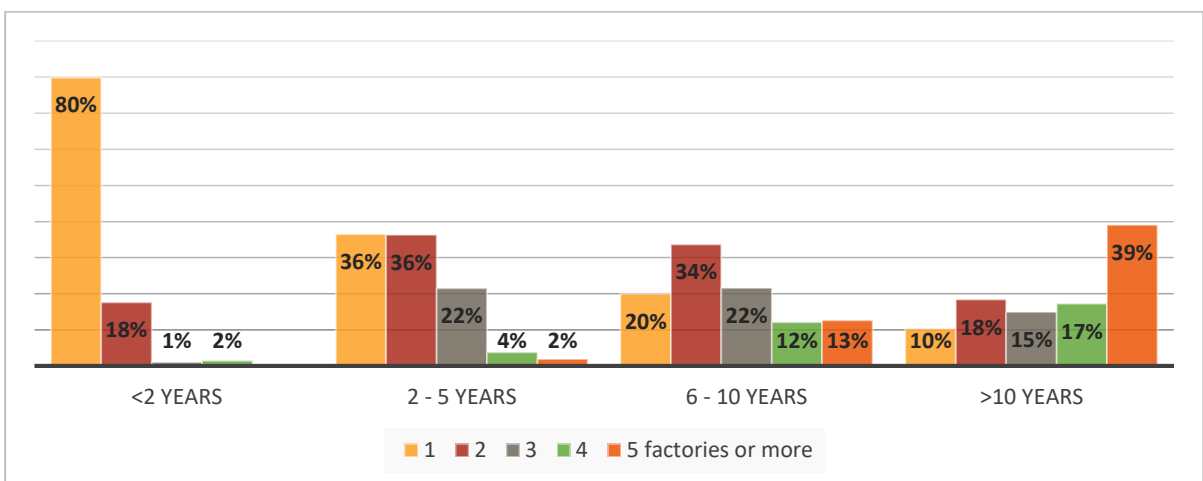


Figure 12: Distribution of respondents by number of factories worked in and years of experience in RMG industry

As long as Bangladesh's garment industry remains labour-intensive because upgrading processes have not been induced yet, the workers' flexibility and mobility will persist. Once a more complex technology is introduced and more sophisticated articles are produced, workers will require more training to maintain productivity and product quality. This is the time when factories start becoming interested in keeping the employee turnover low. Higher wages and positive incentives such as higher salary and better working conditions help keep trained workers who are often feared to choose the best financial offer over loyalty.

4.8 Wages

The Universal Declaration of Human Rights (1948) demands for workers the right to "just and favourable remuneration". The ILO has established a set of labour standards that aim at promoting better working conditions. ILO standards address issues such as the regular payment of wages or promoting the establishment and enforcement of minimum wage levels by convening a tripartite dialogue between employers, workers' organisations and the government.

As Bangladesh's industrial development hinges on the RMG sector and unskilled workforce is largely available, low wages of labour have been the major driver of the country's competitiveness after the MFA phase-out. International NGOs have been protesting that the garment industry's specific wage level in Bangladesh is not sufficient to meet the workers' basic needs. The current minimum wage of 5,300 BDT is below the national poverty line of 6,340 BDT per month and below the lower bound individual living wage of currently 7,810 BDT per month as suggested by Wage Indicator⁴.

The average income of this survey's participants was 6,183 BDT which is below the national poverty line. Female garment workers earned by far less than their male counterparts as presented in Figure 13. The reasons for ongoing gender discrimination in wage rates will be set out below.

⁴ Depending on the methodology, there are organisations suggesting living wages between approximately 8,000 BDT (individual) and 25,000 BDT (family). For more information, see Asia Floor Wage Alliance (<http://asia.floorwage.org/>) that promotes a living wage of 25,687 BDT and the Wage Indicator (www.wageindicator.org).

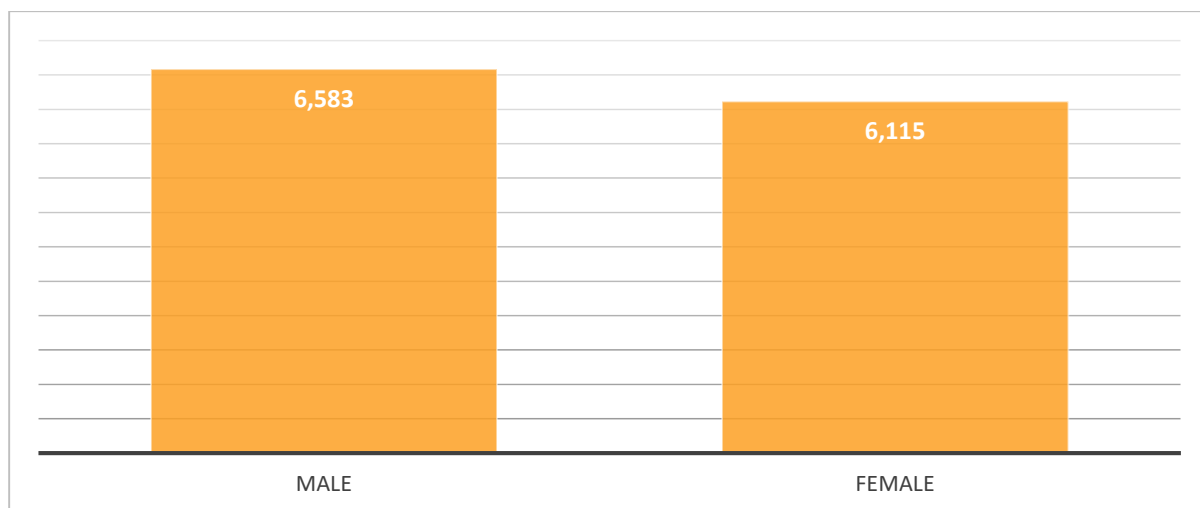


Figure 13: Mean salary per month (in BDT) by gender

Data from this study provide evidence that the minimum wage was not paid to all the workers interviewed. Figure 14 highlights that 7.6% of the workers, 9% male and 7% female, earned less than the legally set minimum of 5,300 BDT excluding overtime. 80% of the women drew wages of 5,300 BDT to 7,000 BDT, whereas only 70% of the male workers lived on this amount. It is fair to conclude that the higher the wages, the more pronounced is the gender pay gap. 16% of the male respondents earned between 7,000 BDT and 9,000 BDT as opposed to only 12% of the females. 5% of the male interviewees even obtained wages beyond 9,000 BDT per month, compared with only 0.5% of the females.

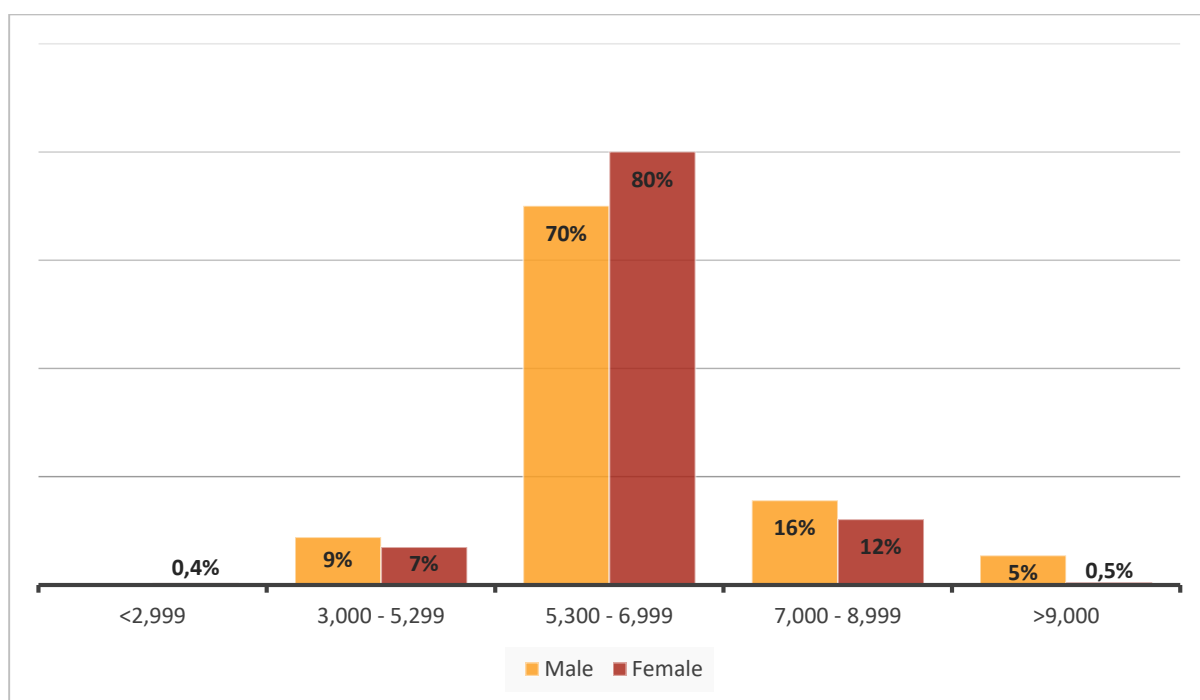


Figure 14: Distribution of respondents by wages (in BDT) without overtime and gender

The results displayed in Figure 14 point to factory realities that severely conflict with ILO Convention No. 100 on equal remuneration for male and female workers for work of equal value. Although Bangladesh has ratified Convention No. 100, the results presented above indicate that the regulation is not effectively enforced. Despite an increase of the minimum wage and thus the workers' nominal income in comparison to the last Workers' Voice Report, there has been no progress in closing the gender pay gap⁵.

Gender differentiation in garment manufacturing has different reasons, many of which are structural. Bangladesh's patriarchal society reproduces female subordination in the garment factory. While their sewing skills and manual dexterity are lauded, women are ascribed characteristics that factory owners utilise to their advantage to pressure for lower wages:

- Women are more docile and can be better controlled than men.
- Women often have no prior wage work experience.
- Women have lower bargaining power than men.
- Women are less mobile than men.
- Women less likely organise in labour movements and are more reluctant to join unions.
- Women's still lower level of education (see 4.5) keeps them stuck in low-skilled operations with less payment.

Some of these observations are stereotypes that are ingrained in Bangladesh's society and only slowly changing.

In the surveys of 2013 and 2016, the influence of experience and education on wages were assumed to be the driving forces of internal promotions and upward social mobility. While education seems to be statistically less relevant (see 4.5), experience matters particularly as sewing operations are learned on the job. Figure 15 allows for the rather expectable bottom line in terms of work experience: the more years workers spent in the RMG industry, the higher their wages. The percentage of workers drawing less than the minimum wage was highest among those with less than 2 years of work experience (17%). With increasing work experience, the share of workers with a salary between 7,000 BDT and 8,999 BDT rose as well. There is no increasing percentage of those earning more than 9,000 BDT, which is the salary group of very high-skilled operators and supervisors. Not all experienced operators qualified for these assignments.

⁵ Unfortunately, this study was not able to calculate the real wages. Although Bangladesh's minimum wage, one of the lowest in the world, has been increased twice since 2010, real wages have actually decreased. Several studies point to augmenting inflation and declining purchase power.

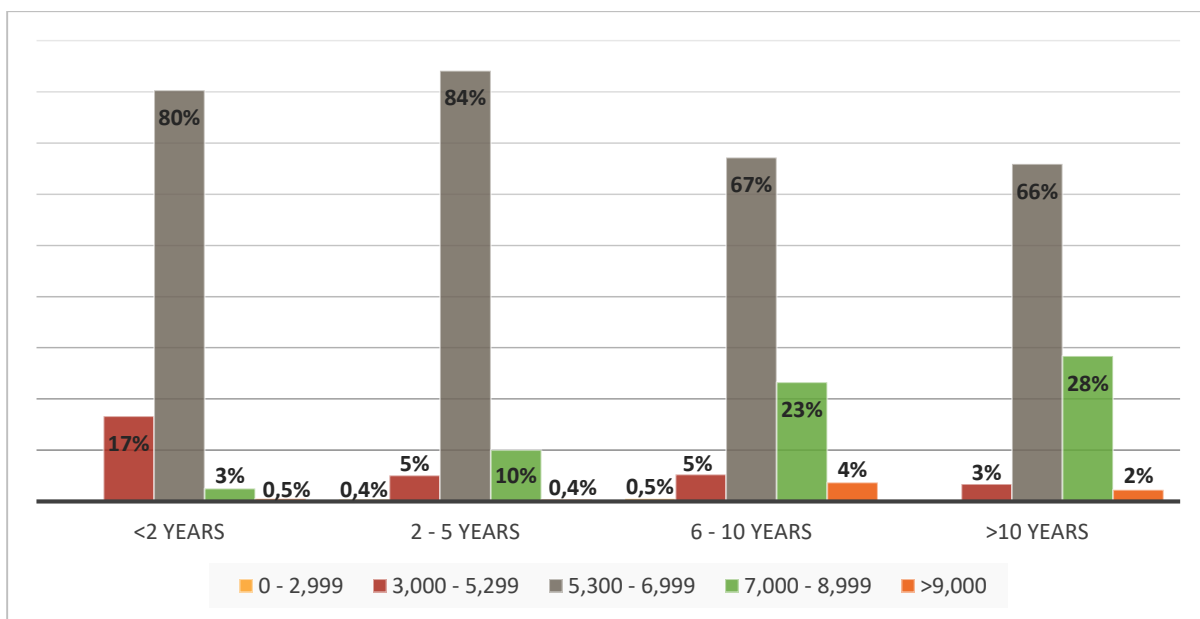


Figure 15: Distribution of respondents by wage groups and years of experience in RMG industry

In addition to the years of work experience, the number of factories the operators worked in was assumed to have an effect on wages. Although the percentage of workers drawing only the minimum wage is highest among those who had been working only in one factory (11%), it does not continuously fall with the rising number of factories they have worked in (Figure 16). The share of workers earning more than 7,000 BDT grew to the fourth factory, whereas work experience in more than 5 factories did not translate in higher wages anymore. In general, work experience in different factories with different buyers, processes and requirements paid off, whereas very mobile workers (> 5 factories) might have been questioned for their skills and loyalty instead of being acknowledged their experience. More qualitative research is needed to understand the dynamics between work experience and wages.

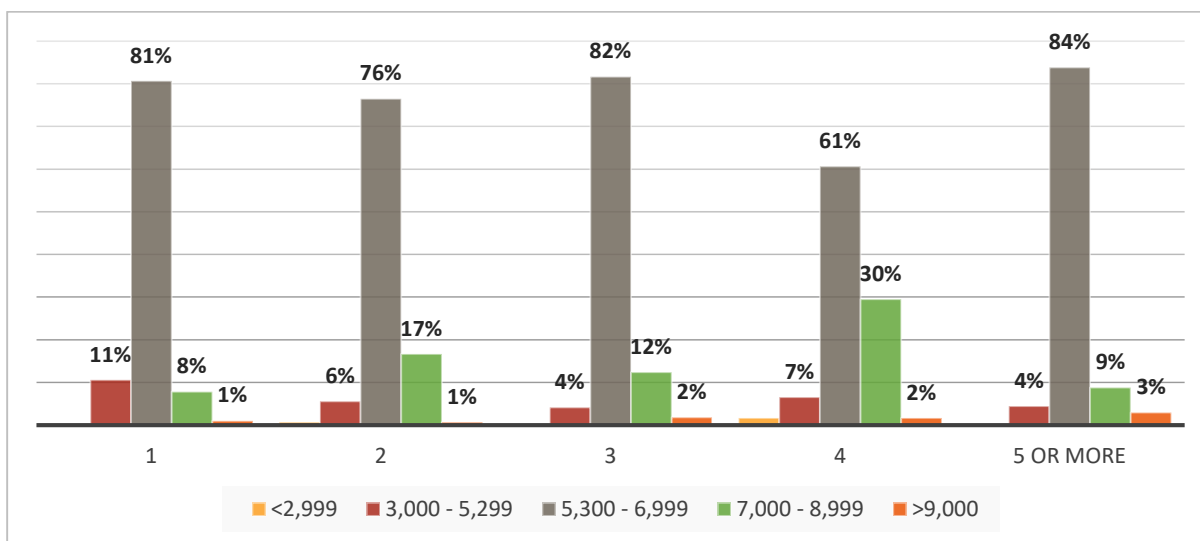


Figure 16: Distribution of respondents by wage groups and the number of factories worked in

The mean salary slightly but not continuously increases with better education, which is an indication that the years of schooling have no significant influence on wages. Two findings can be stressed though: i) the workers without any years of schooling earn significantly less than those with education; ii) only a completed school education ensures higher wages.

However, there is no positive correlation between education and wages for this study's respondents. Workers with a bachelor degree on an average earned less than those with a Higher School Certificate. Same applies to workers with 7-9 years of schooling and those with 4-6 years of formal education (see Figure 17).

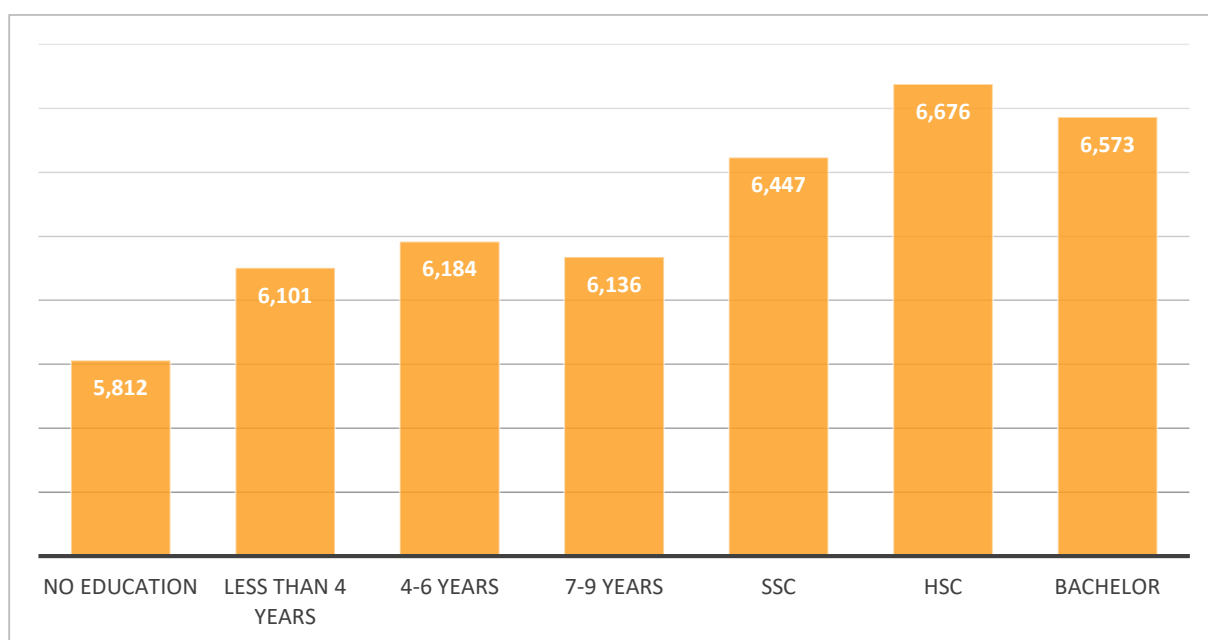


Figure 17: Mean salary by the respondents' education

Hence, education or the years of schooling have no significant influence on wages. Results from Figure 18 indicate that those drawing a salary of 9,000 BDT and more enjoyed relatively more years of schooling and hold comparatively more SSC (33%). However, school does not prevent from indecent payment. The few (female) workers (3) earning less than 3,000 BDT count on 4 to 9 years of schooling, none with an SSC though; up to SSC all kinds of education are represented within the income group of 3,000 to 5,299 BDT.

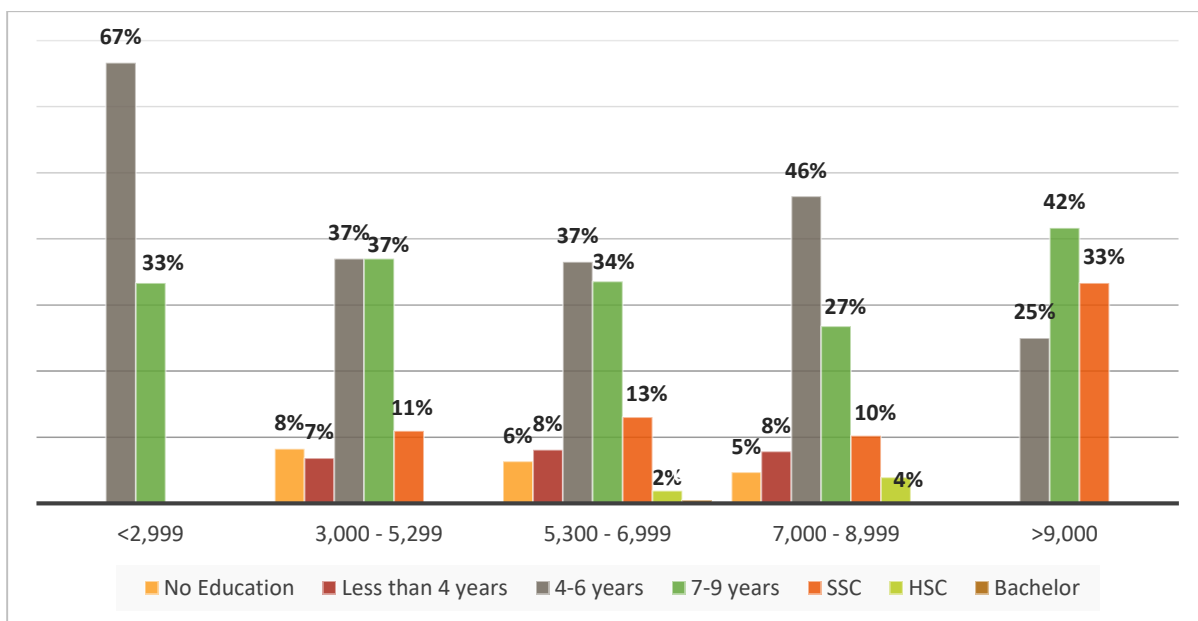


Figure 18: Distribution of respondents by wage groups and education

Figure 19 presents the distribution of the wages within each education category. From less than 4 years of schooling to HSC a relatively constant percentage of workers earned more than the minimum wage (approx. 92-94%). Respondents with an SSC and HSC degree had a higher income on an average level. The few workers with a bachelor degree only drew an average income of 5,300 BDT to 6,999 BDT.

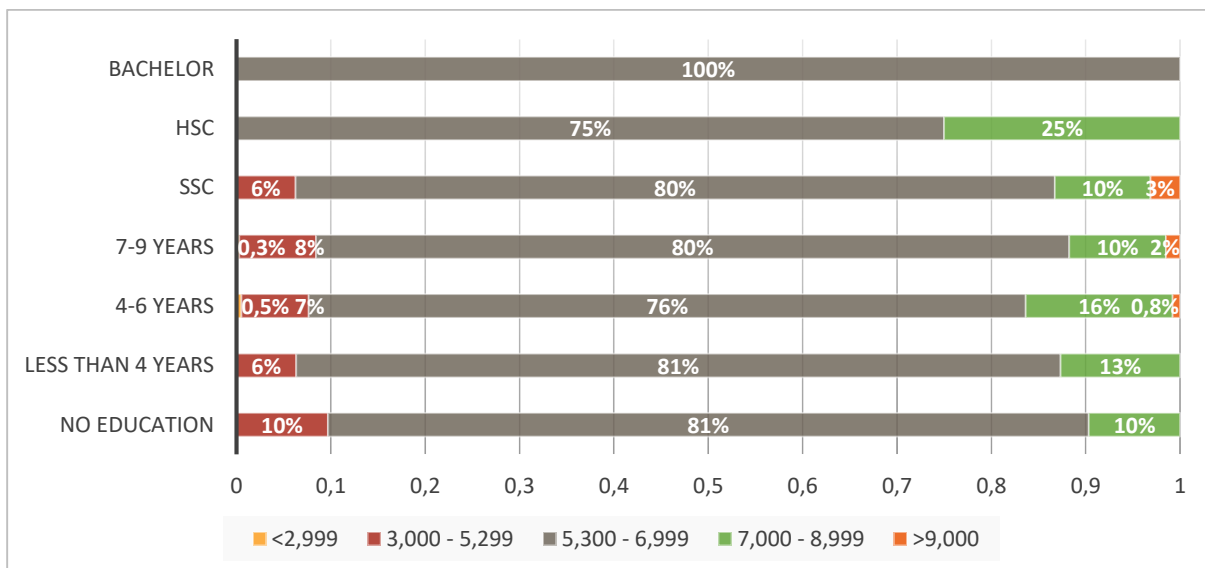


Figure 19: Distribution of respondents by wages and education

From the analysis on wages, the following findings can be derived:

- Wage levels continue to be low.

-
- The minimum wage legislation is not effectively enforced.
 - There is still a remarkable gender gap in the payment of garment workers.
 - Numeric work experience seems to be conducive to higher payment, although it has to be verified if the factory management rewards loyalty and if more years spent in one factory pays off.
 - The years of schooling do not have a significant influence on wage levels.

Considering the findings outlined above, tripartite meetings and national minimum wage setting mechanisms have proven ineffective. The garment employers in Bangladesh deny their workers the fundamental right of a wage level that allows them to cover their basic needs. It is mandatory to push workers for sectoral collective bargaining processes, empowering unions to develop to a critical size and to bargain just wages and working conditions.

4.9 Working hours

The ILO established standards on working time for regulated hours of work and rest periods. ILO Convention No. 1 sets the general standard at 48 working hours per week, with a maximum of eight hours per day. Workweeks in Europe usually do not exceed 40 hours, whereas low-income countries such as Bangladesh limit the workweeks to six days and 48 hours. Overtime hours are regulated nationally; Bangladesh poses a limit of two hours per day on total overtime hours. With these instruments, the ILO aims to reconcile the employers' interests of high productivity and the necessity to protect the workers' physical and mental health. It is questionable, however, whether 60 hours per week of monotonous assembly-line work do not affect the workers' health.

After the MFA phase-out in 2005, the garments industry moved towards faster and more flexible production. A result of Bangladesh's exposure to global competition has been low wages often accompanied by other inappropriate labour conditions. Wages and working hours, for instance, are closely interrelated. As the minimum wage in Bangladesh's RMG factories is insufficient to meet the workers' basic needs, they feel forced to do extra hours.

Almost every respondent (96%) of this study, without gender discrimination, worked six days a week. A regular working day of eight hours would result in a standard week of 48 hours. However, for 85% of the workers it was common to do overtime hours. Figure 20 shows that regular working hours were not respected. Although the bulk of the workers (57%) remained within the 2-hours limit, more than one fourth of the respondents was used to excessive overtime, working more than ten hours a day or 60 hours a week.

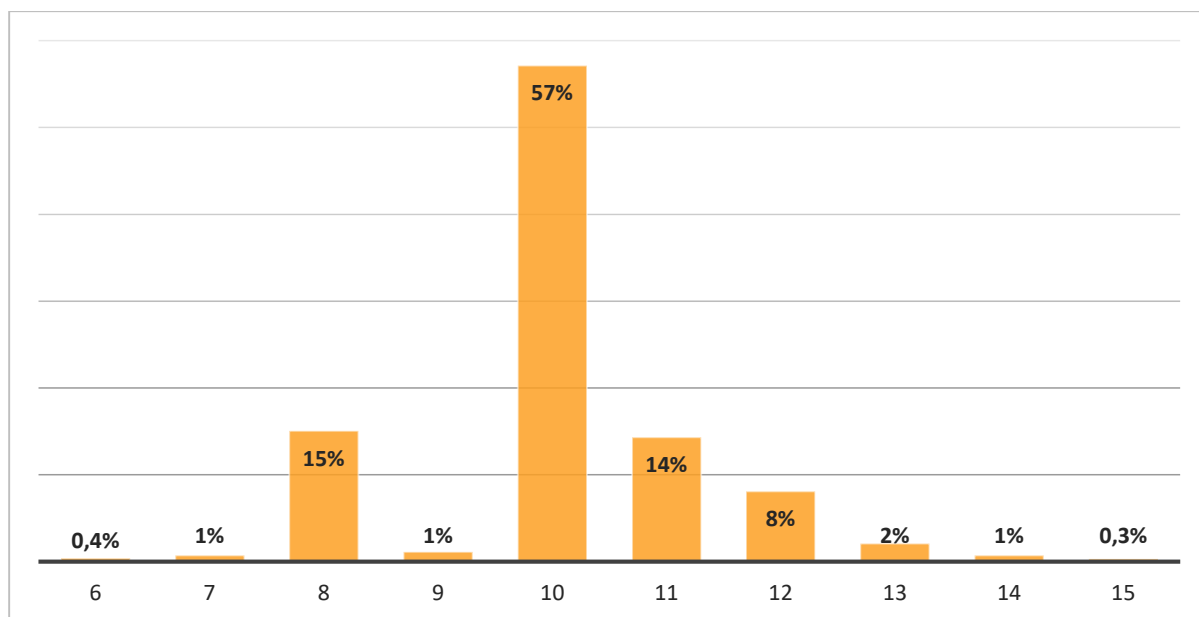


Figure 20: Distribution of respondents by daily working hours

In comparison to the survey from 2013, a major reduction of working hours has been identified. While ten-hour-shifts increased by 18%, excessive overtime has been significantly reduced: the number of current workers doing three overtime hours diminished by 7%, the percentage of those doing four extra hours even dropped by 12%. Workers with five and more overtime hours add up to only a little more than 3%, whereas in 2013 12% were doing such excessive overtime. These results suggest that factory owners have made an effort to comply with labour laws, which may be a result of an improved auditing and labour inspection system.

Low wages and high order volume within a highly competitive garments manufacturing industry worldwide are the main drivers of long working hours. The low regular income is insufficient to cover basic needs, obligating the workers to do overtime 'voluntarily'. High order volume and tight lead times impose long working hours on the workers who often do not know about their legal rights.

The data presented in Figure 20 show a substantial improvement in comparison to the Workers' Voice Report 2013, but still indicate that about one-fourth of the workers interviewed slipped the inspection system. The Government of Bangladesh should devote more resources to enforce existing labour laws. More effective labour inspections that act upon violations and enforce sanctions are likely to improve the factories' compliance with labour laws.

4.10 Occupational health

Low wages and long working hours create an environment of stress and careless behaviour at the workplace. Other studies widely acknowledged that garment workers are prone to suffer from illness that is related to their daily work. 67% of the garment workers interviewed suffered

from physical health problems, which is less than in 2013 (approx. 80%). Figure 21 exhibits a greater exposure of female workers (69%) to physical ailments in comparison to men (55%), which can be related to the women's additional burden of parenting and household chores.

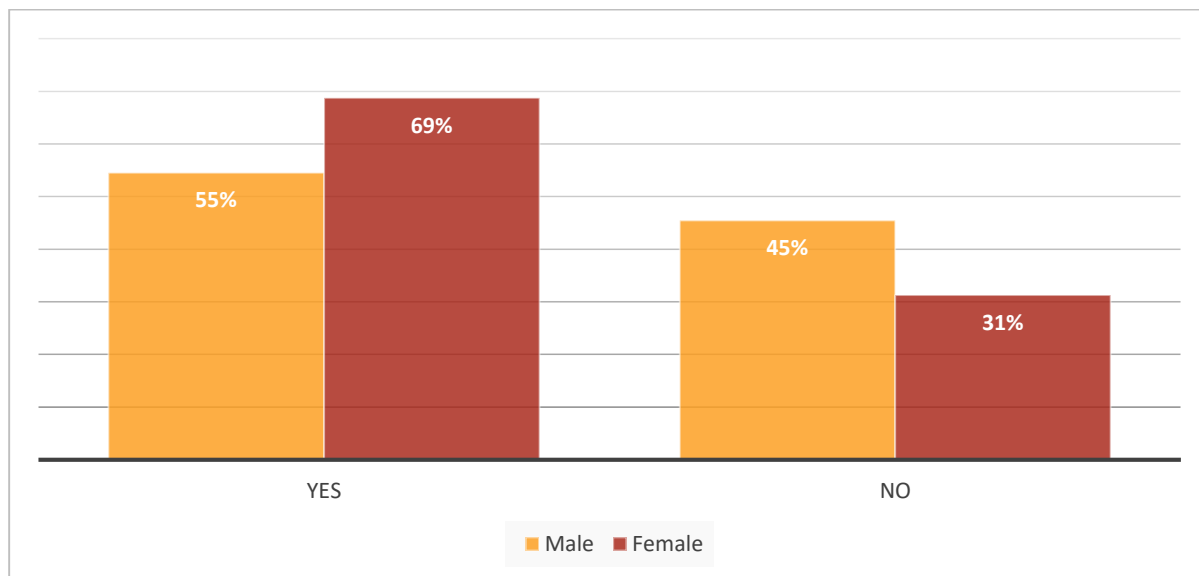


Figure 21: Distribution of respondents by physical health problems and gender

The way the management was dealing with requests for sick leaves is disturbing, although 73% of the respondents eventually have been granted leave for illness. According to Figure 22, 41% of the workers, females slightly more than males, reported that the management was annoyed by their requests and misbehaved. In comparison to 2013, this reaction even worsened. 17% were advised to consult a medical doctor – interestingly, men (24%) much more than woman (16%). In 14% of the cases, workers were approved to take leave, whereby female workers contain a higher percentage (15% vs. 9%). 11% of the respondents were given some time to rest. Still 9% were forced to keep working. Altogether half of the respondents did not receive an adequate response to their sufferings. Very few workers were arranged medical treatment, got punished or saw their salary deducted.

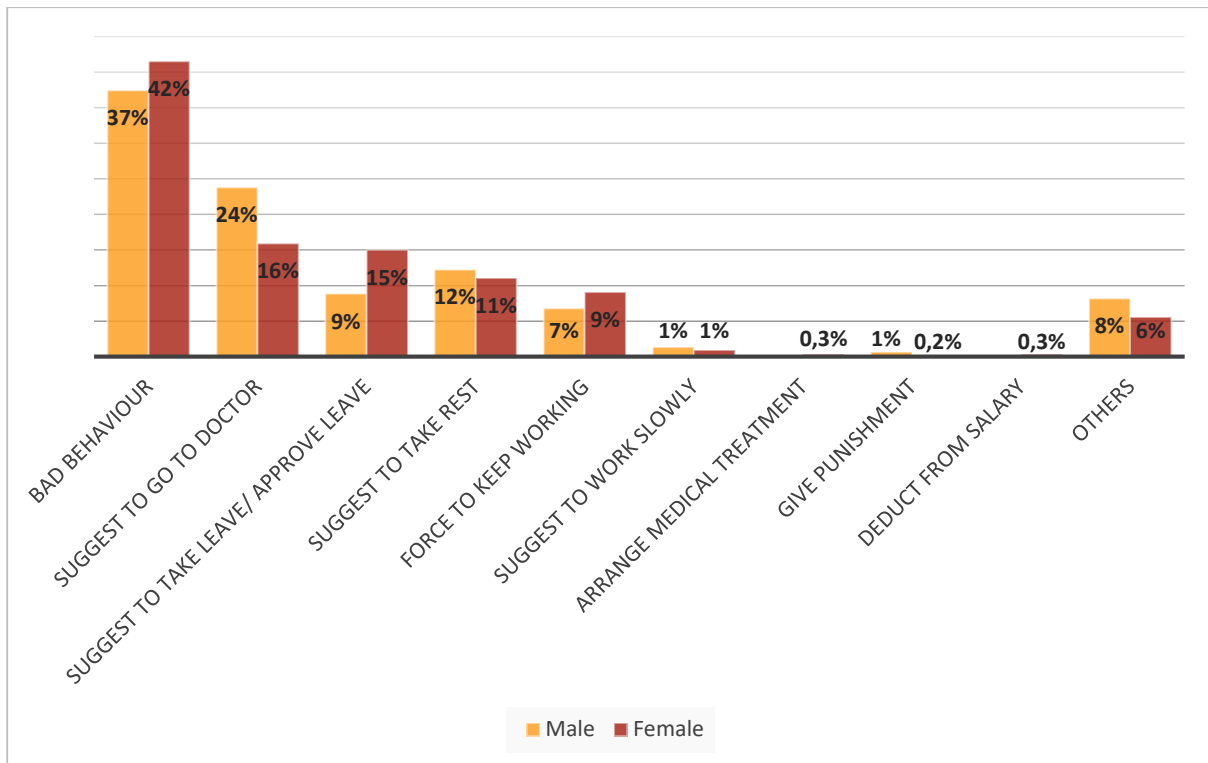


Figure 22: Distribution of respondents by management's response to worker's illness and gender

The competitive requirement for low-income countries to cut labour and production costs puts pressure on the workers. Little knowledge of their rights prevent them from insisting on adequate treatment. Figure 23 highlights the difference in information between male and female respondents, which eventually impacts on the women's health and well-being as they carry on working despite illness.

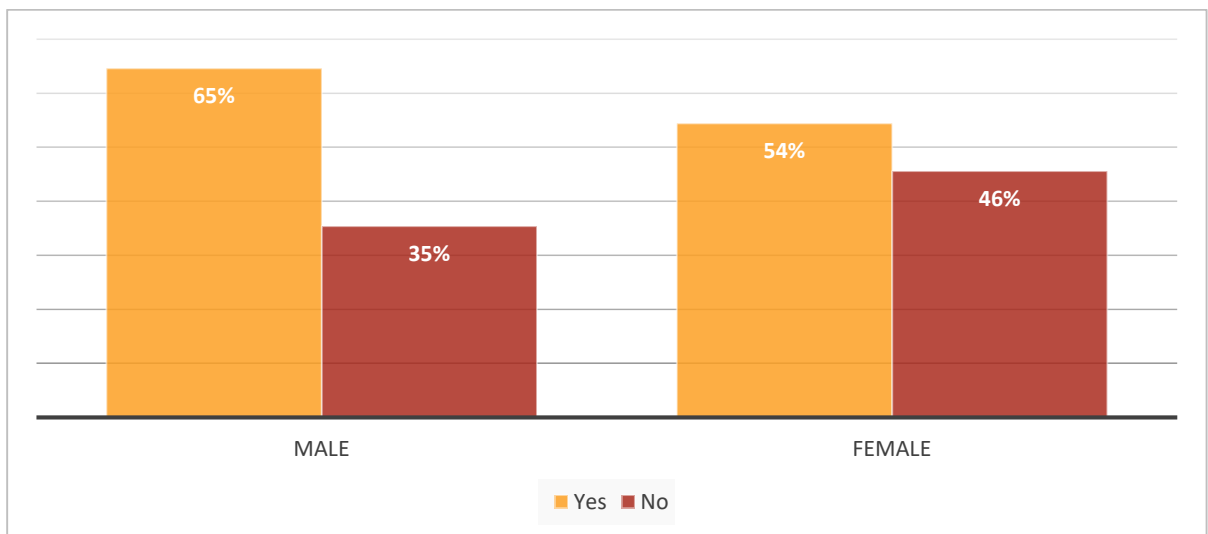


Figure 23: Distribution of respondents by awareness of sick leave and gender

Factory owners pass on the pressure to meet daily production targets to their workers by applying strict factory rules and regulations in combination with poor working conditions. As discussed above, excessive work hours impact on the workers' health and workplace safety. They can generate unexpected indirect costs for companies in terms of accidents, injuries, absenteeism, lower productivity, and high worker turnover, so that new employees need to be recruited and trained. In fact, 30% of the workers interviewed suffered an accident at work (see Figure 24), out of which the overwhelming majority of 73% experienced a preventable fire incident. Almost one-fourth (24%) of the respondents even witnessed earthquakes. Bangladesh's homes and factories are built on fault lines, some of which are considered highly dangerous to produce one of the biggest earthquakes in that region. Hence, in addition to Bangladesh's vulnerability to cyclones and floods, there is a considerable risk of earthquakes that might bring both people's homes and factories built on sandy ground to danger. Garment companies and the government need to plan for and invest in earthquake resistant structures, so the workers' lives can be protected.

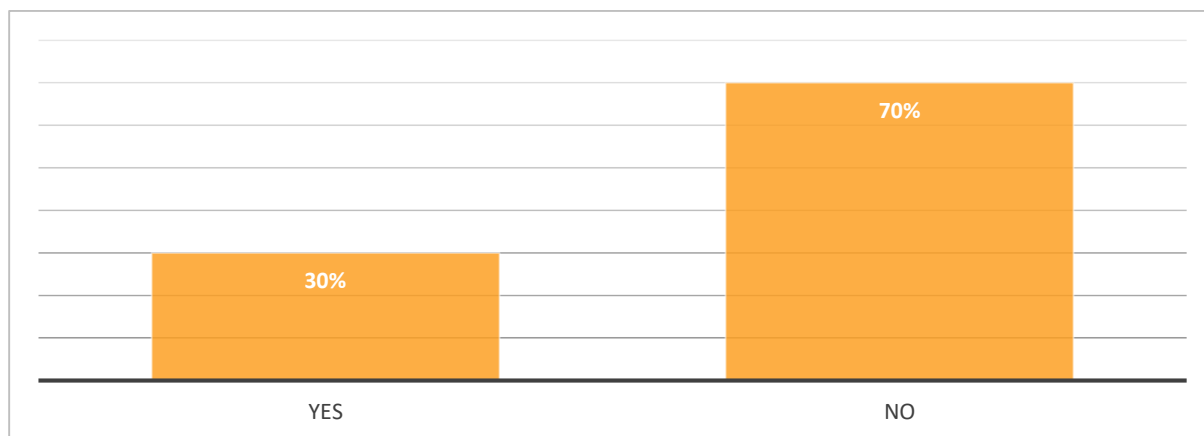


Figure 24: Distribution of respondents who suffered an accident at work

Out of the number of accidents experienced, the respondents report a mainly supportive behaviour by the factory management. Figure 25 reveals that 56% were helped for evacuation by the staff people; 23% reported that the fire was extinguished quickly. Still 15% of the respondents were forced to continue to work – an irresponsible behaviour that caused more than a thousand workers to die in the collapse of the Rana Plaza building. Besides preventive measures to ensure fire safety, it is mandatory to train both the factory management and the workers in how to behave in the case of fire incidents.

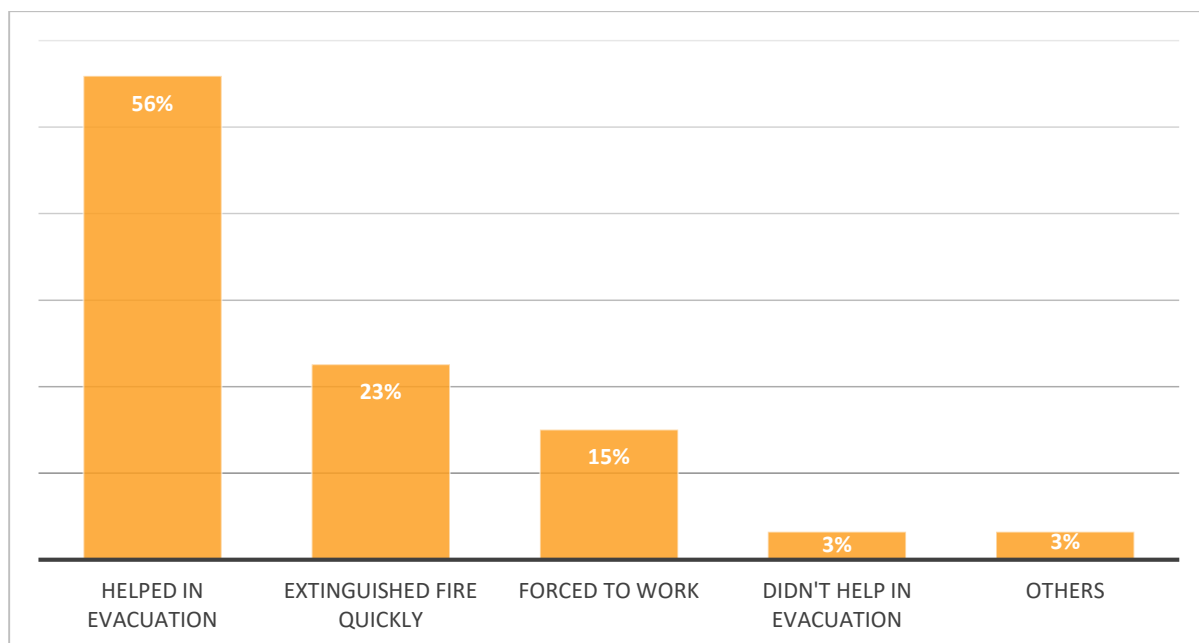


Figure 25: Distribution of respondents by reactions of factory management in case of accidents

Despite partly encouraging reactions by the factory management, there seems to be an atmosphere of fear and pressure in the factories that entail accidents and physical health problems. Better audits, more inspections and sustainable management processes accompanied by trainings for workers and management are required to ensure health and safety at the workplace.

4.11 Perception of workplace

Before proceeding to abusive conditions in factories, it is noteworthy to look into what workers say how they feel about their workplace. In addition to likes and dislikes, workers were asked about the changes they would deem appropriate.

Figure 26 illustrates the main reasons cited for liking the workplace. 29% appreciated the timely payment of wages and overtime that allowed them to support their families and secure their livelihood. 16% enjoyed working in a clean factory environment. Interesting to note is that 27% of the male workers liked this about their work environment as opposed to only 14% females. To them a well organised, tidied factory with drinking water and clean sanitary facilities was an achievement. Bangladesh provides almost no employment alternatives in manufacturing industries, except for the leather industry which is a male-dominated sector and, moreover, infamous for dirty production conditions. Only few respondents liked their workplace for their amenities, such as proper dining facilities (4%), medical facilities (2%) or proper leave facility and payment (2%), which have no gender-specific differences. Merely 4% appreciated the managers' and supervisors' good behaviour, which is pointing to a less attentive work environment. 13% of the workers criticised that there is not anything positive at their workplace

at all. The category “other” includes responses of values below 1% such as maternal leave, good relationship to the management or accessibility of the workplace, the latter of which was surprisingly not mentioned to a larger extent.

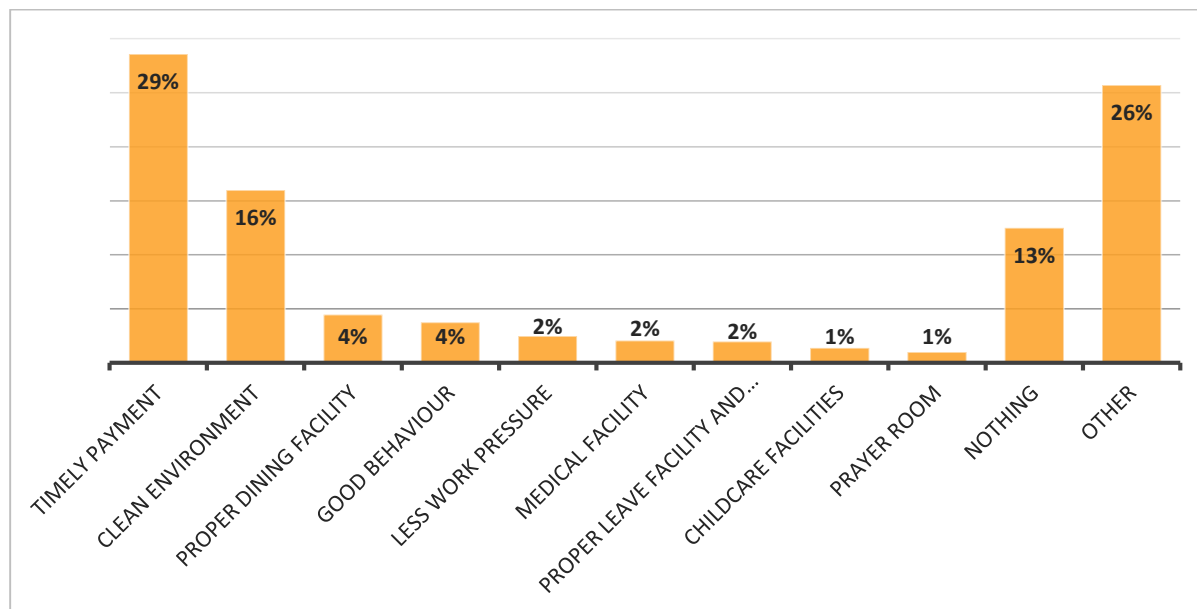


Figure 26: Distribution of respondents by positive view of their workplace

With regard to 2013, the priorities seem to have changed: in 2016, timely payment mattered more (2013: 23.9%); in turn, a good factory environment is not that important anymore to current workers (2013: 27.5%). Good behaviour by managements and supervisors is mentioned less than in the last report (10.4%).

As for the negative view of the workplace (see Figure 27), the reason most frequently cited was bad behaviour by supervisors and managers (35%). The workers complained that their superiors easily got angry and constantly gave pressure to meet production targets by doing overtime in the evenings and on weekends. Short lead times translate in production pressure and thus in extremely high work pressure which was bothering 11% of the workers. These results show that the factory floor is characterised by an extreme lack of respect for workers, denying them human dignity. It is necessary to put other complaint mechanisms in place and at the same time to provide trainings to the factory management and supervisors to raise their awareness of addressing such complaints adequately.

10% of the workers experienced occasionally late payment, which concerned male workers (15%) more than females (10%). This may be owed to the fact that men still are or would like to be single earners and thus feel more pressure to provide for the family. By contrast, women often add their earnings to the household income, which is why their families are less dependent on their salary. Surprisingly, workers seemed to prioritise timely payment over low wages, which has not been mentioned at all. 8% of the workers interviewed complained about

not having the possibility to take payment instead of leave or even have the opportunity to go on leave. The lack of job security (2%), child care (1%), maternal leave, medical facility (1%) or the possibility to do overtime (1%) are minor concerns for the workers. Low values for answers such as punishment, use of operators as helpers, or lack of toilets and prayer rooms, amongst others, were grouped into the category “other”.

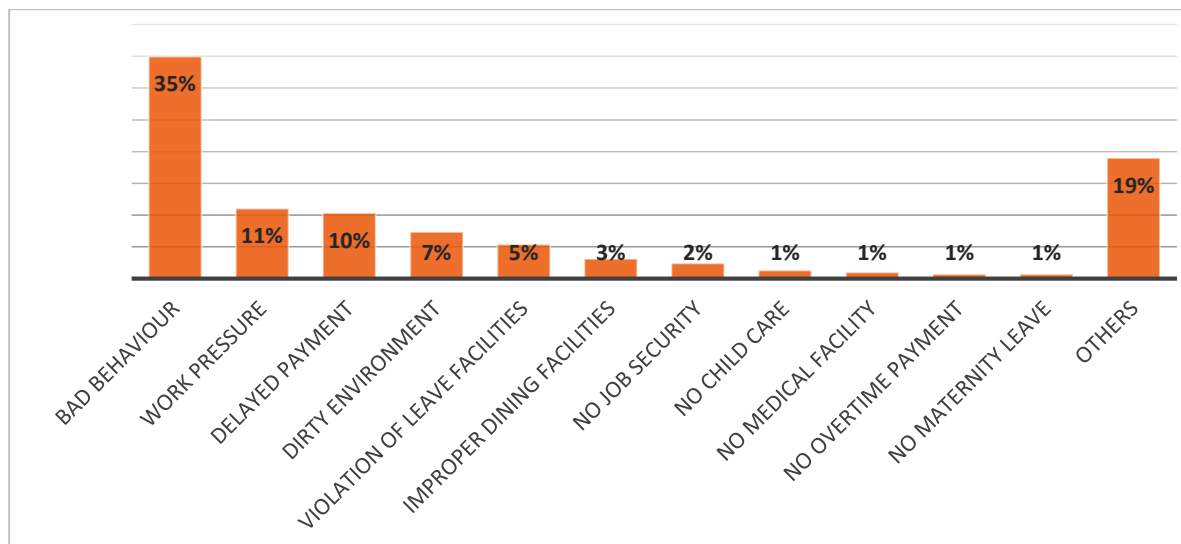


Figure 27: Distribution of respondents by negative view of their workplace

Supporting the workers’ negative view of the industry in general and their own workplace in particular is additionally reflected by the workers’ strong rejection of allowing their siblings and children a career in the RMG industry. Only 8% can imagine to see them work in a garments factory. Again the main reasons cited were work pressure (47%) and bad behaviour (23%).

The results displayed in Figure 28 emphasise that it is necessary to bring about change in the factories. In line with the responses above, the workers interviewed came up with suggestions to improve the working conditions in their factories. Almost one-third of the respondents (31%) considered it important to ensure good behaviour at the factories. Male workers estimated it even more important than their female co-workers (35% vs 30%), confirming the fact that abuses and threats affect both gender alike. Timely payment (14%) was a major concern for the workers to sustain their families. Male workers also attached more importance to timely payment, which may be explained by the patriarchal Bangladesh society expecting men to be single earners (see above). Instead, women placed more emphasis on a salary increase (10% vs 5%) in response to the structural disadvantage they are facing compared to their male co-workers (see Section 4.8 on wages). Females were also more inclined to ensure proper leave facilities, demanding earned leave payment instead of taking leave, which would allow them to increase their comparatively low salary. However, a total of 10% desiring a salary increase indicates that most of the workers seemed to be content with the minimum wage that had been doubled in late 2013. In view of the production and work pressure, 8% would like to see their

workload reduced. At least 11% were satisfied with the working conditions and did not consider it necessary to change anything at all. Responses such as ensuring clean environment, job security, maternity leave, or leave facilities, and creating day care or prayer facilities were rarely mentioned and thus grouped into “other”.

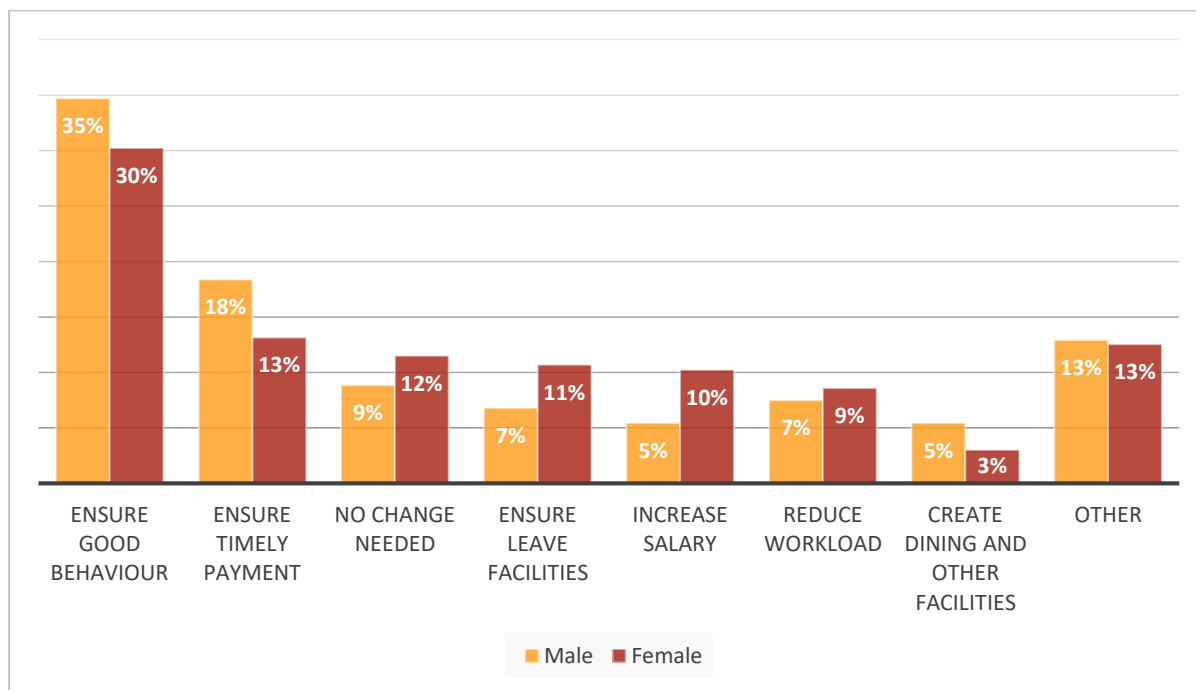


Figure 28: Distribution of respondents by change desired in own workplace and gender

Asked about whether they enjoy working in the RMG industry, the workers were surprisingly indifferent (68%), female even more than male workers (see Figure 29). Degrading working conditions such as verbal abuses, long working hours and poor remuneration seem to be endured as long as their employment is able to sustain their families.

Labour in the global south is often considered indifferent from western perspectives. Downward pressure on wages and little change in working conditions over the past years may create an atmosphere, in which workers just try to get by instead of aiming to improve. A fatalist view of their living and working conditions is the result. Moreover, monotony of work generally is not conducive to developing a critical mind, especially as unionists often are bullied and burdened with more work load. Despite many workers were denied substantial labour rights, only 8% disliked working in garment factories. Female respondents were less negative (7%) than their male co-workers. One reason may be that work in the garment industry still provides employment opportunities they otherwise would not have.

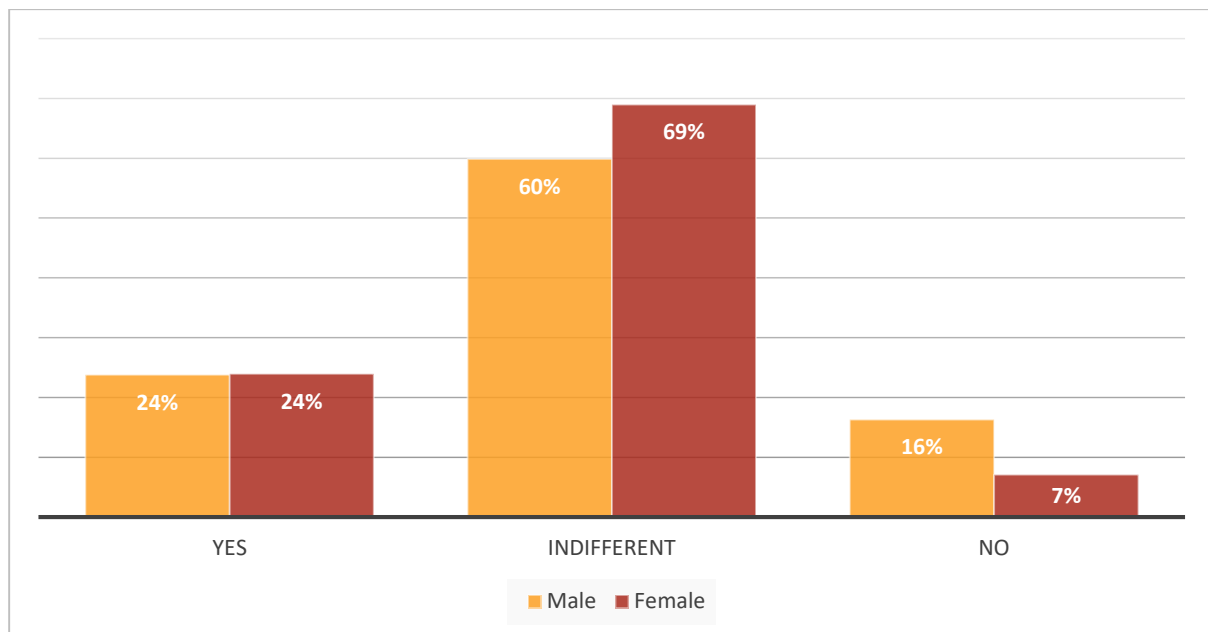


Figure 29: Distribution of respondents by opinion of work in the garments industry and gender

Results from the analysis on perceptions of the workplace show that the workers interviewed appreciated two aspects: a good and respectful working environment and timely payment of salaries and overtime.

It is a striking coincidence to the last Workers' Voice Report in 2013 that workers did not mention their right to collective bargaining or to freedom of association. Apparently, the awareness of labour rights is low and securing their livelihood seems the workers' primary concern. It is on governmental and development agencies to highlight the relationship between the satisfaction of labour rights and safe and healthy working conditions.

4.12 Exposure to abusive behaviour

The Workers' Voice report of 2013 revealed that more than one third of the workers had experienced discriminatory and abusive labour conditions. The survey of 2015/2016 provides evidence that currently even more workers were employed under abusive conditions. Only about 40% of all workers interviewed said they had never seen or heard about any abuses in their factory. Altogether, irrespective of their gender, 61% of the workers reported some type of abuse by managers or supervisors. In 2013, it was only one-third of the workers interviewed. Figure 30 demonstrates that workers of both gender were subject to the same extent to threats and penalties.

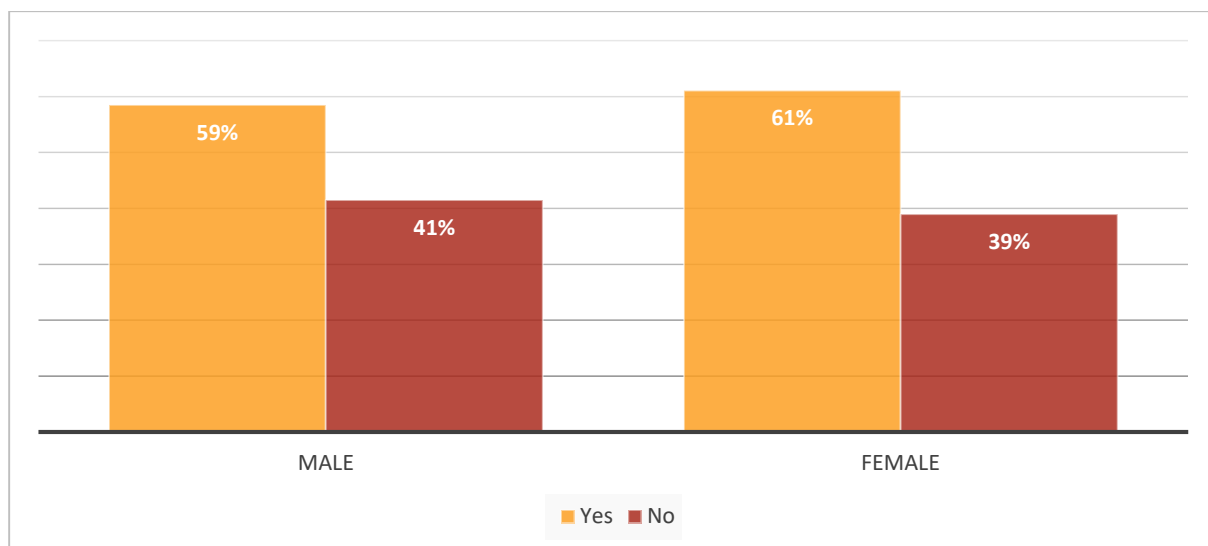


Figure 30: Distribution of respondents by abuse reported and gender

Abusive behaviour at the workplace can take different forms. Results from this study point to a widespread culture of disrespect of workers by their superiors. Figure 31 illustrates that verbal abuse (67%) was most commonly reported, followed by bad behaviour (15%), salary deduction (5%) and physical violence (3%). Managers and line supervisors were reported to verbally intimidate and pressure workers to complete orders by using foul language and scolding. Sexual insinuations were also involved. Workers complained that they were forced to work overtime hours or when unwell just to meet production targets. They were denied maternity and sick leave, were pressured not to use the toilet, and were delayed the payment or did not receive wages at all.

Bad behaviour, understood as any kind of harassment, slightly increased in comparison to the survey from 2013 (12%) when verbal abuses prevailed (82%). 5% of the current workers were deducted their salary because they had not met individual production targets. This form of punishment is often applied to workers with health problems. 3% faced at least once an attempt of physical violence by their superiors. Being beaten or having pieces of garments thrown at them for missing the production target is a common punishment in RMG factories.

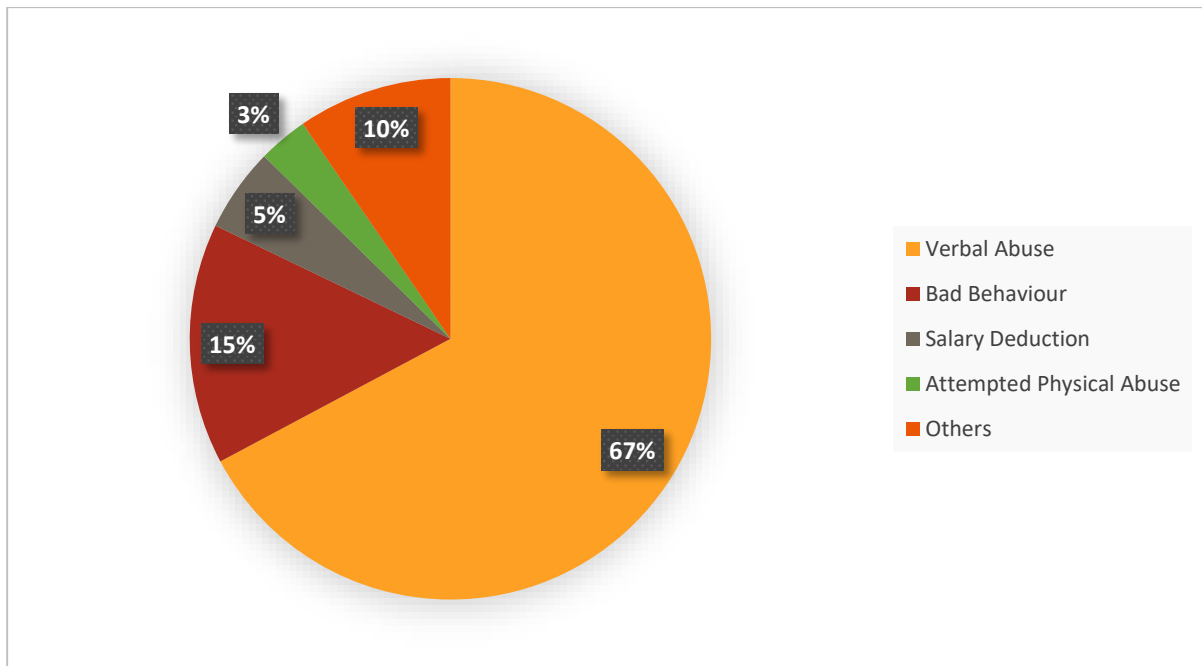


Figure 31: Distribution of respondents by type of abuse reported

Most of the abused workers suffered abusive behaviour on a regular basis as it is displayed in Figure 32. Other than assumed, there is almost no difference in terms of the frequencies male and female workers were exposed to abusive practices. In 2016, most of the workers (91%) faced abuses sometimes or often in comparison to only 61% in 2013. Extreme frequencies diminished as well (only once: 7% vs 17%; very often: 2% vs. 21%). However, abuses remain a common feature in Bangladesh's RMG sector irrespective of minor changes in frequency.

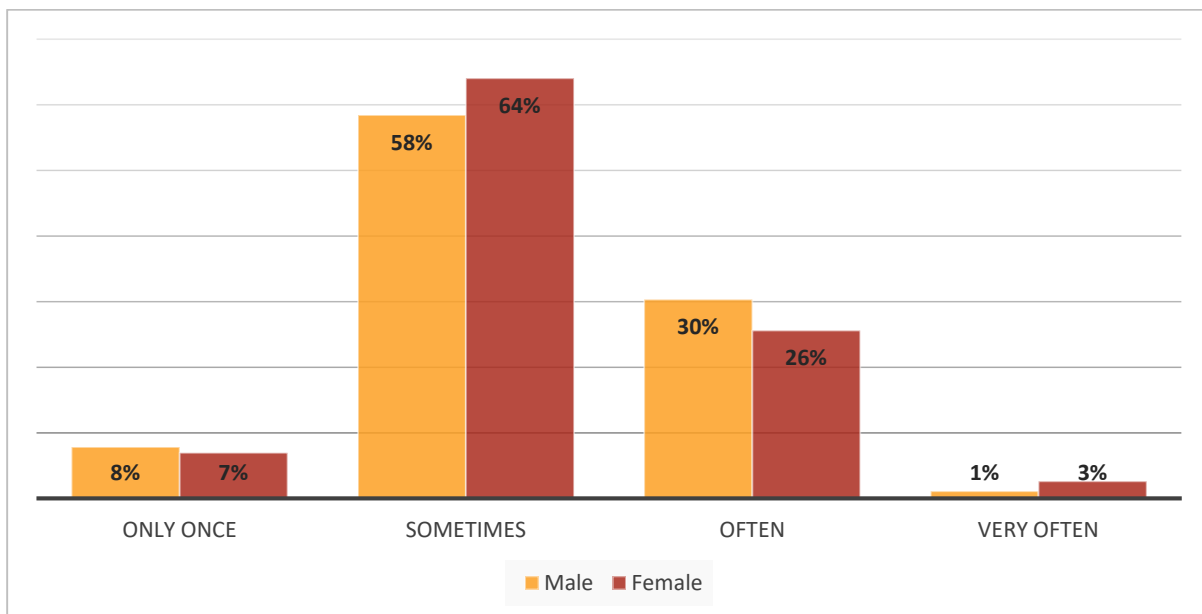


Figure 32: Distribution of respondents by frequency of abuse experienced and gender

In all age groups the majority of the workers suffered abusive behaviour 'sometimes', with values varying from 55% to 69%⁶ (see Figure 33). The older the workers grow, naturally the more often they have experienced abuses.

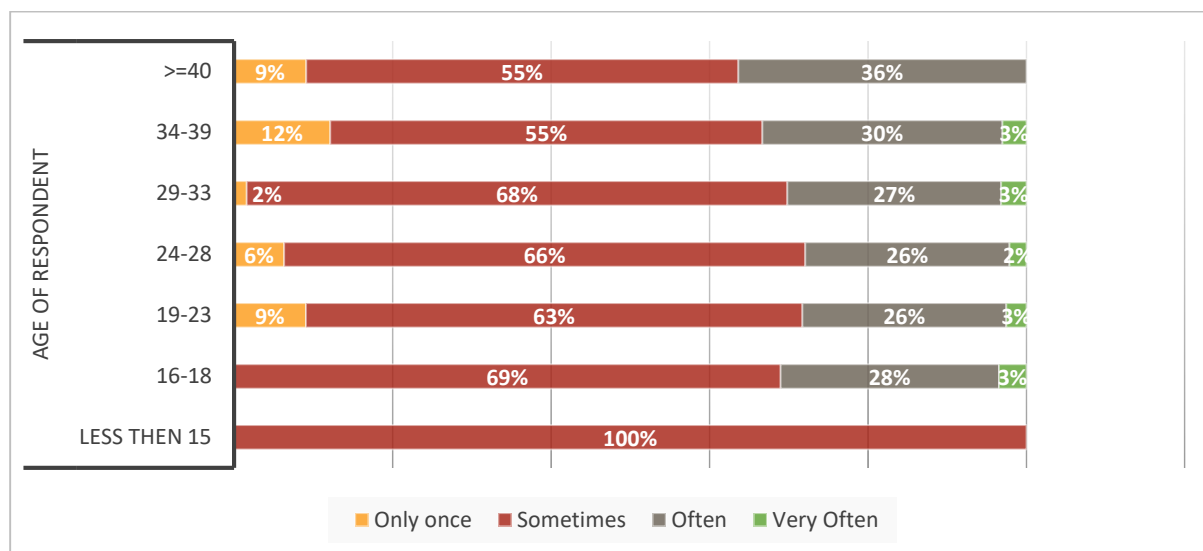


Figure 33: Distribution of respondents by frequency of abuse experienced and age

While there is no significant correlation between experienced abuse and education and age, it is noteworthy that abuses start very early and affect all age groups alike. Factory managers and supervisors take advantage of the workers' age and their little experience in the industry to know about how to stand up to unacceptable behaviour.

Experience in the garments industry seems to have an influence on abusive conditions. Figure 34 shows that those who were working for 2 to 5 years in the garment industry were slightly disproportionately affected by abuses (58% vs. 53% normal distribution). According to the sample's distribution, almost one fourth were newcomers with less than 2 years of experience who are more vulnerable to threats and abuses.

⁶ Out of 614 workers who experienced any kind of abuse the only case below the age of 15 indicated that s/he was abused sometimes.

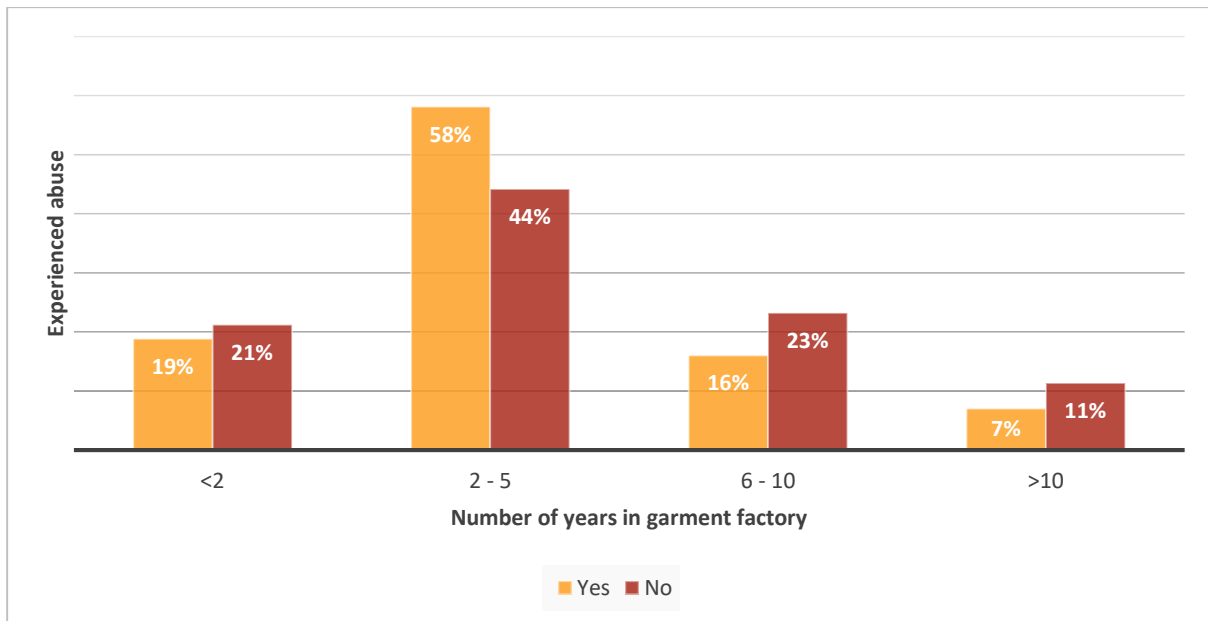


Figure 34: Distribution of respondents by experienced abuse and experience in the industry

Each age group comprises a share of 6% to 9% who suffered abuses only once (see Figure 35). Almost three-fourths of those with less than 2 years of work experience sometimes were exposed to abusive conditions, a percentage which is decreasing with increasing age. On the contrary, the ratio of workers who suffered often and very often any forms of abuses slightly increases with age from 19% to 37% and 1% to 5%, respectively. This means the workers usually cannot evade abuses over time.

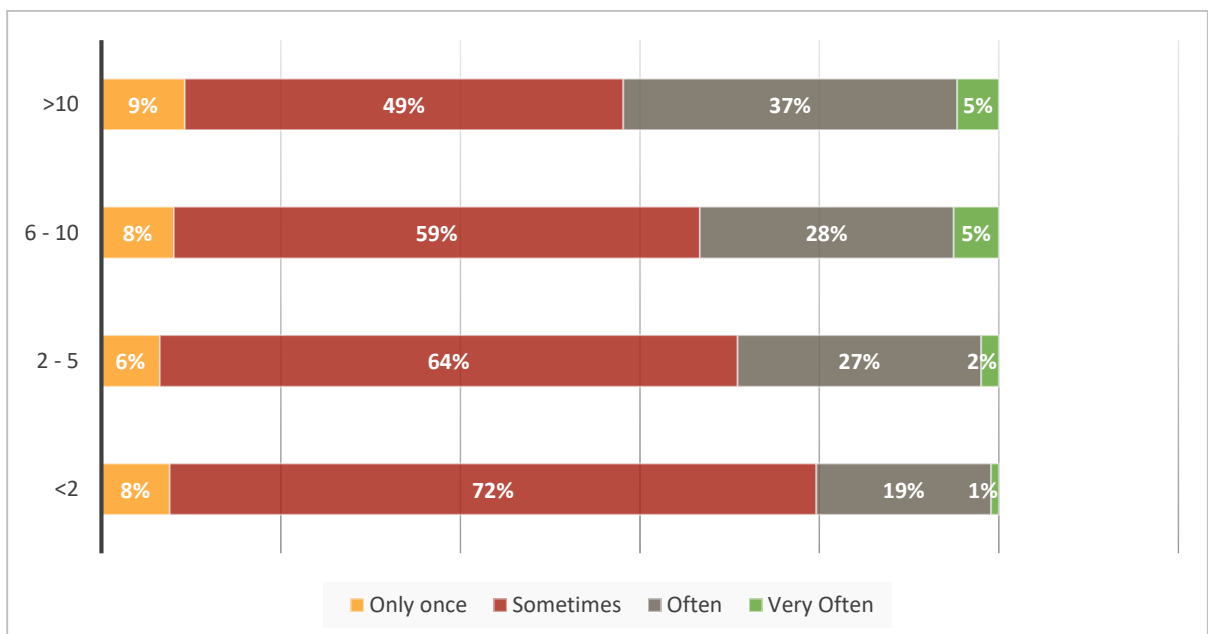


Figure 35: Distribution of respondents by frequency of experienced abuse and experience in industry

Very few of those who experienced abuses opposed to such untenable conditions. According to Figure 36, 11% complained to the administrator and 8% of the respondents protested against abusive behaviour; 0.5% attempted to resign. The overwhelming majority of 67% remained silent because they were afraid of negative reactions by the accused and the factory management. The pressure to support their family weighs more than personal humiliation by abuses. This result supports the assumption that there is an environment of stress and fear dominating in Bangladesh's RMG factories.

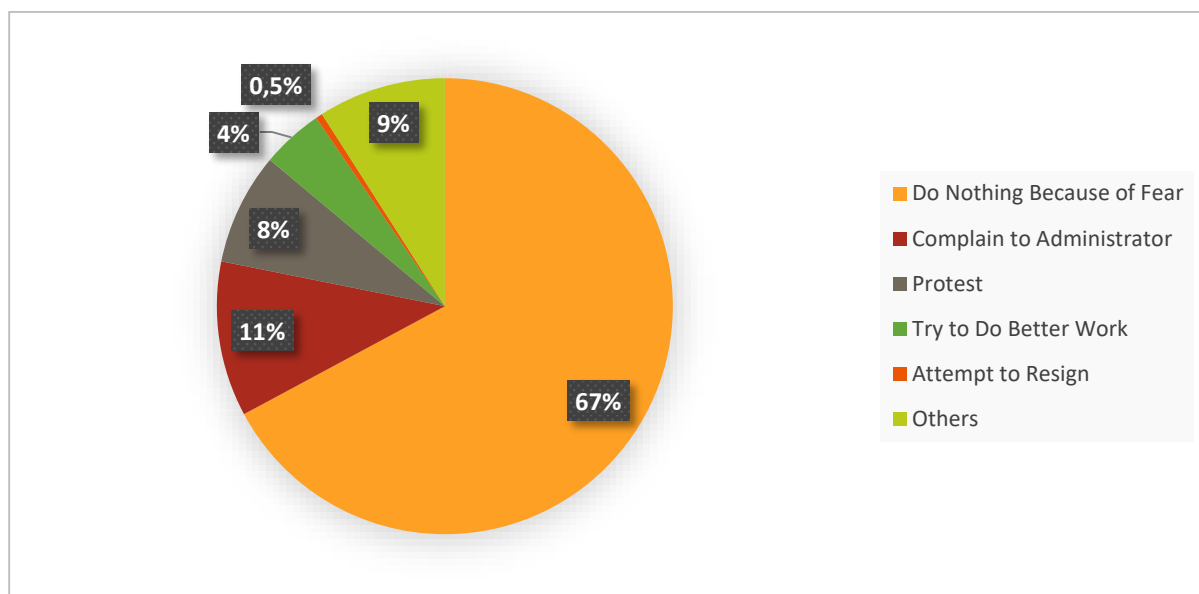


Figure 36: Distribution of respondents by reactions to abusive behaviour

Analysing the data from a gender perspective, brings interesting results to the fore: 91% of the workers interviewed who avoided to do anything against the abuses because of fear were women. This is more than the sample's gender ratio. Figure 37 also shows that proportionately a higher percentage of male workers exhibited signs of resistance. 41% protested against such practices, while 33% attempted to resign and one-fourth complained to the administrator. Instead, women sought to avoid further abuses by focusing on doing better work, conforming to their subordinate position in Bangladesh's society⁷.

⁷ Questions were not included in the survey seeking further details of complaint mechanisms and so no quantitative evidence is available regarding the handling of the management when confronted with accusations of abusive behaviour.

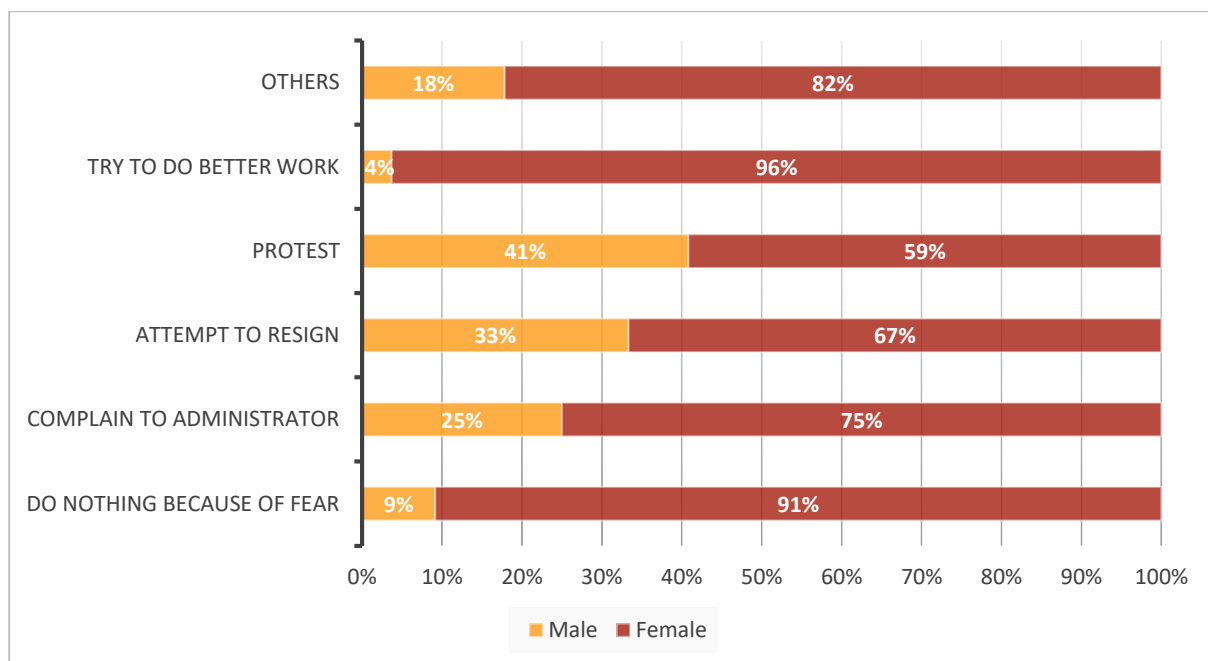


Figure 37: Distribution of respondents by response to experienced abuse and gender

The results show that neither age nor education correlate in any way significantly with experienced abuses or the reactions to abuses. Work experience does not prevent from abuses; they rather seem to be a constant companion for many of the workers. Particularly female workers need to be encouraged to report abusive conditions at the workplace, but are often intimidated by a repressive factory management. International brands and buyers need to monitor their supply chain for abusive conditions to ensure an environment devoid of threats and harassment.

4.13 Housing

Employment hardship often is accompanied by poor living conditions. The cost of living in the densely populated capital city is extremely high for the urban impoverished class. Most of the workers lived with their families (74%), slightly more than in 2013 (69%). Particularly, girls/young women follow social conventions to stay in the parents' home until they marry. Only 6% of the participants lived alone as it is very expensive for a single person to rent accommodation in Dhaka on their own. Moreover, safety concerns and social conventions make it unacceptable for women to stay alone. 16% of the respondents share a room or an apartment with co-workers, usually near the factory, just to cut costs.

High rental costs consume a significant amount of the workers' monthly wages. More than half of the respondents paid more than 2,500 BDT for their accommodation (see Figure 38). Given an average salary (without overtime) of 6,183 BDT, this is an enormous financial burden, even if the workers were no single earners. The constant in-migration of garment workers from rural

areas to Dhaka has made affordable housing a critical problem. Very often garment workers end up in one of the capital city's "bostees", which are settlements that often lack an adequate provision of basic infrastructure (water, sanitation, electricity, gas). It is not uncommon to pay half their salary for a room in a deprived urban settlement that needs to be shared with co-workers or other family members.

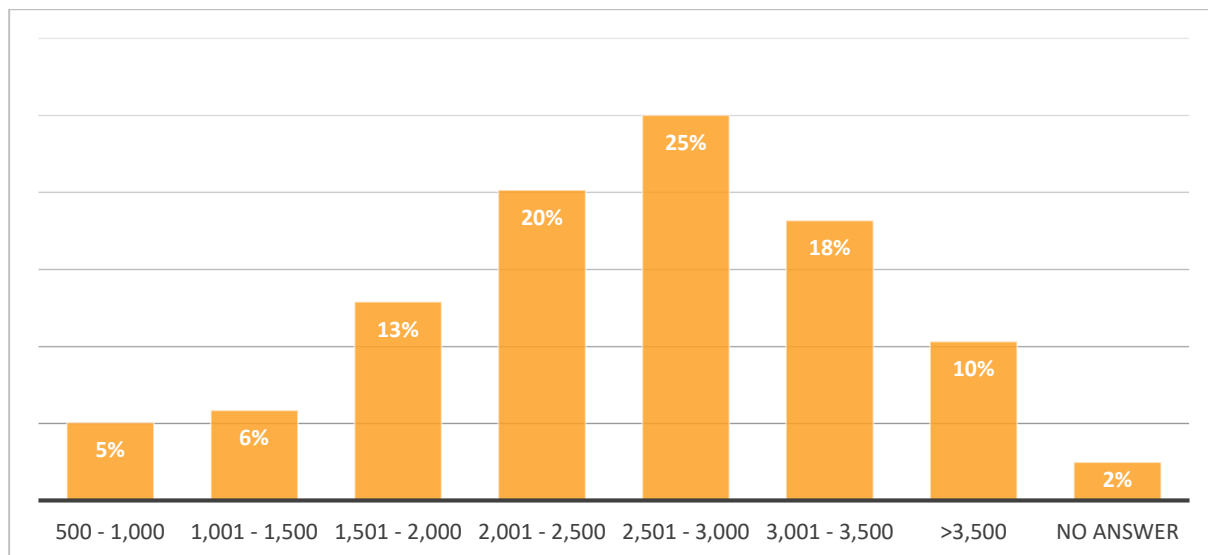


Figure 38: Distribution of respondents by monthly cost of accommodation (in BDT)

In comparison to the survey of 2013, the percentage of workers paying more than 3,000 BDT for rent, which is at least half their (average) salary for accommodation, increased from 22% to 28%. This might be owed to an overall increase of rental costs in the metropolitan area of Dhaka.

The gender difference in the costs for rent is remarkable: results presented in Figure 39 suggest that women paid comparatively more for housing than men. 85% to 91% of those who have accommodation costs of 1,501-3,000 BDT were women, representing a higher share than the sample's gender composition (85/15); 90% of those who spent more than 3,500 BDT are females. Only in the category 3,001-3,500 BDT female workers were slightly underrepresented. By contrast, with about one-third, male workers benefitted relatively more from low rents between 500-1,500 BDT than female workers.

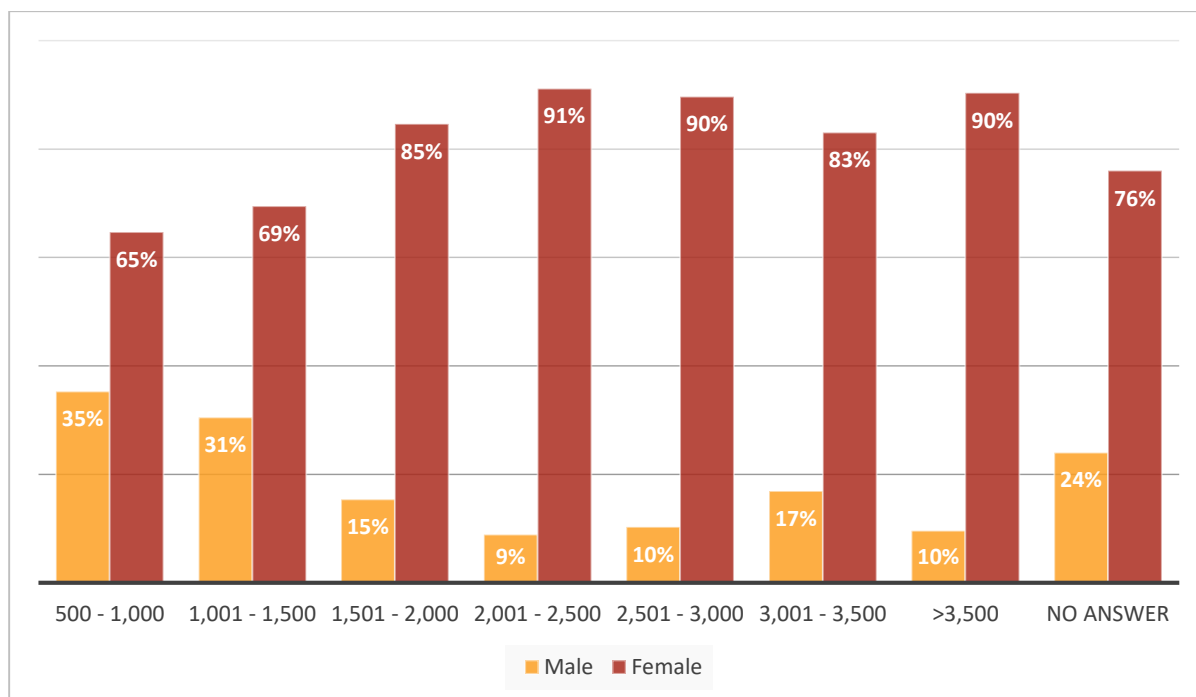


Figure 39: Distribution of respondents by monthly cost of accommodation (in BDT) and gender

The results presented above stress that female workers, despite their lower average income, were more burdened by expenses for housing than their male co-workers. Moreover, they usually pay for enhanced security if they stay alone or share a room/apartment with co-workers. Given the unacceptable conditions, it is necessary to provide low-cost housing facilities to garment workers, returning to them some dignity.

4.14 Accessibility

Most of Bangladesh's 5,000 garment factories are clustered in and around the capital city. This generates an impact on housing and transportation for the low paid workforce. Living within commuting distance of their workplace is critical for garment workers as by social conventions particularly women are expected to take care of responsibilities at home.

The survey found that 75% of the workers lived within less than 15 minutes from their workplace, which is a considerable higher percentage than in 2013 (63%). Figure 40 shows that women lived closer to their workplace than men (76% vs 67%), while in 2013 it was the other way round. 28% of the male workers commuted daily 15-30 minutes to their factory as opposed to only 18% of the female respondents. There is no difference between women and men in longer distances, whereas in 2013, about 20% of the workers commuted 30-45 minutes. Then female workers commuted larger distances, while this year's results indicate that men on average commute farther to work.

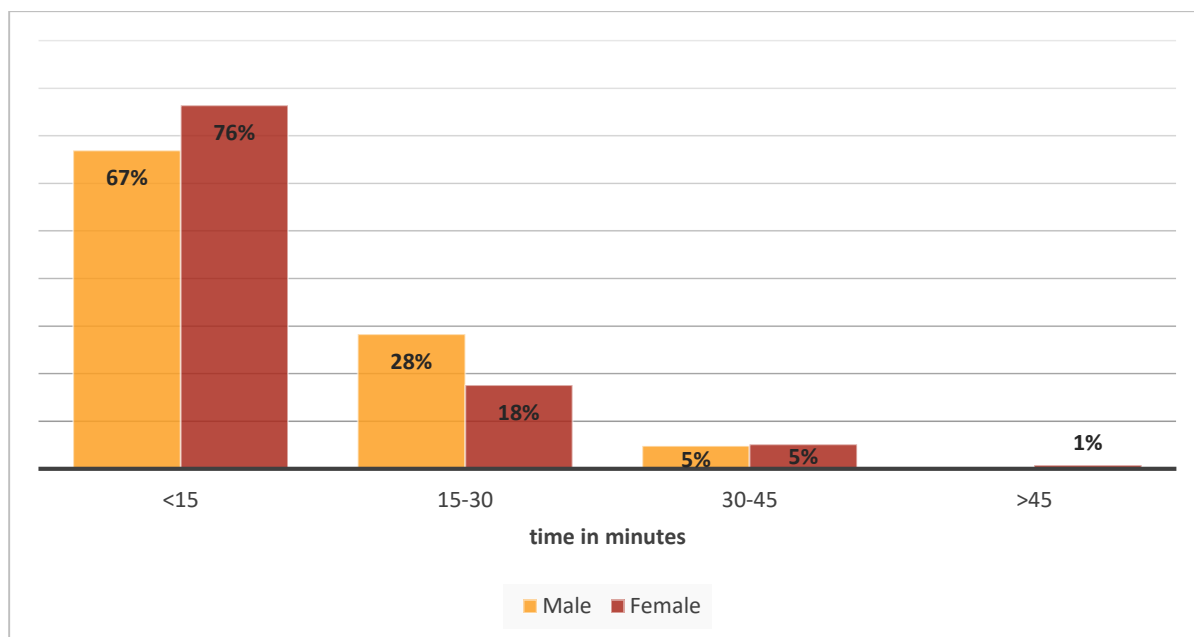


Figure 40: Distribution of respondents by commuting distance to factories and gender

Close proximity between home and workplace is essential for low-paid garment workers. It can be inferred from 94% of the workers having no expenses for transportation that they either lived within walking distance or went by factory bus or could not afford travel expenses (see Figure 41). This figure increased again in comparison to 2013 (88%). This means that almost 20% more than those living within 15-minute distance incurred in no transportation cost. It is assumed that those who lived farther away made the choice to walk to cut costs. 95% of the female respondents did not spend money to get to work as compared to 86% of the male respondents, which indicates that there is more pressure on women to save money. 12% of the male workers bore costs of up to 20 BDT for public transportation (bus); only 4% of the female workers spent a similar amount of money.

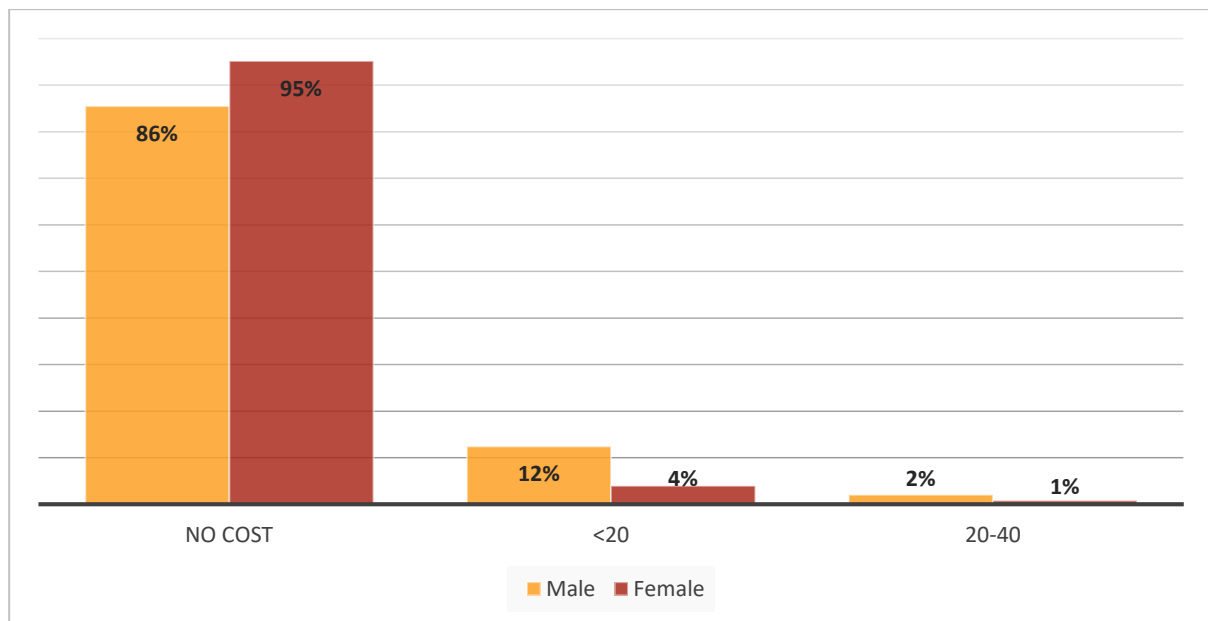


Figure 41: Distribution of respondents by travel costs (in BDT) to factory and gender

Commuting on foot to their workplace exposes garment workers to unsafe roads. Harassment-related incidents are common but rarely reported. It is paramount for the government to ensure road safety and for the factory owners to provide their workers save and cost-free passage on their daily commute.

4.15 Activities outside the garment industry

Garment workers work on an average 10.06 hours per day and thus have little time to spend outside the working environment. Most of this study's workers are women who despite their full-time employment are engaged in household-related activities.

Figure 42 is a striking expression of Bangladesh's patriarchal society: 88% of the female workers, as compared to only 32% of men, did household work before they left for the factory. The majority of the male workers pursued activities of rather personal fulfilment, such as listening to music, praying, or studying. Very few mentioned to spend time with the family or visit relatives. 10% of the male workers sleep or rest, in comparison to only 2% of the women. 9% of the male workers interviewed watched TV and even 6% hung out with friends, activities for which women had no time at all. Only 8% of the male respondents went buy groceries in the morning. These results suggest that women workers were far more burdened by household chores than men.

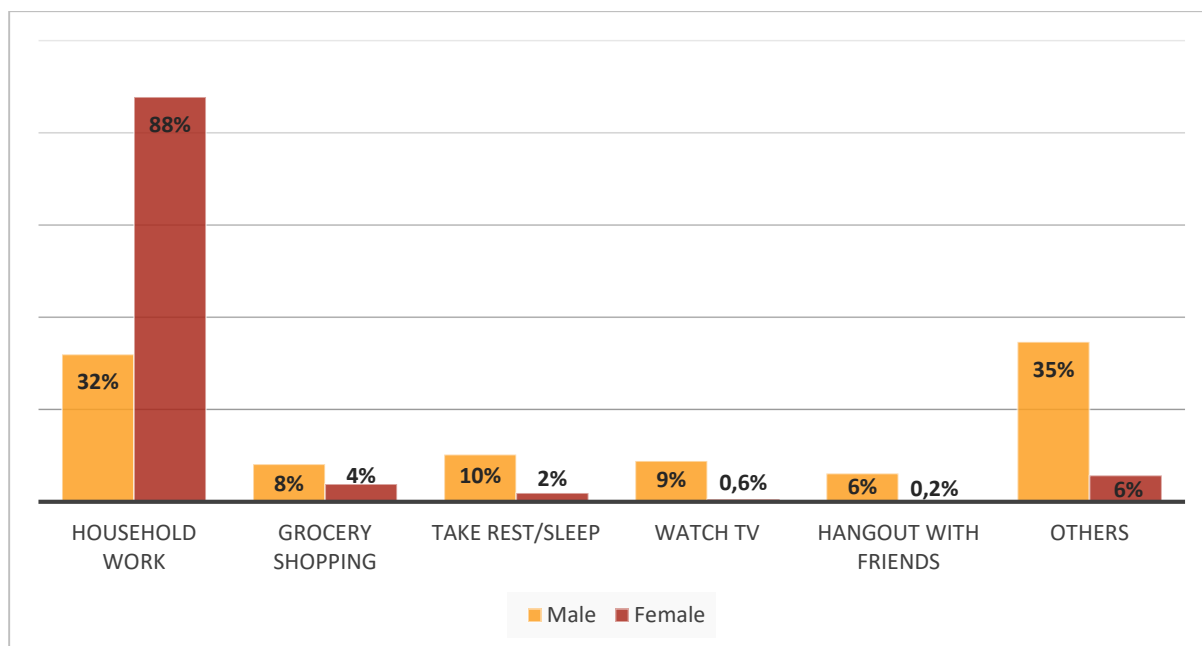


Figure 42: Distribution of respondents by activities before work and gender

In activities after work gender imbalances are less pronounced but still remarkable. Figure 43 testifies to a tremendous bias towards to the disadvantage of female workers. 74% (68% in total) addressed themselves to household chores, while only 27% of the men interviewed made an effort to carry out such activities. Most of them abdicated from family-related responsibilities and spent their time sleeping (16%), watching TV (12%) or hanging out with friends (9%). 5% dedicated their time after work to their family. The results underscore the responsibilities and duties women face in addition to their workload at the workplace. Very few of them had time to rest or to do anything for their personal development.

This discrepancy between men's and women's activities outside the garment industry was already identified in 2013, although the values for household work, for instance, were lower (approximately 46%). The burden of employment, household and childcare is on the women's shoulders. Bangladesh's patriarchal society needs to change and provide more support to women to reduce their workload in both professional and private spheres.

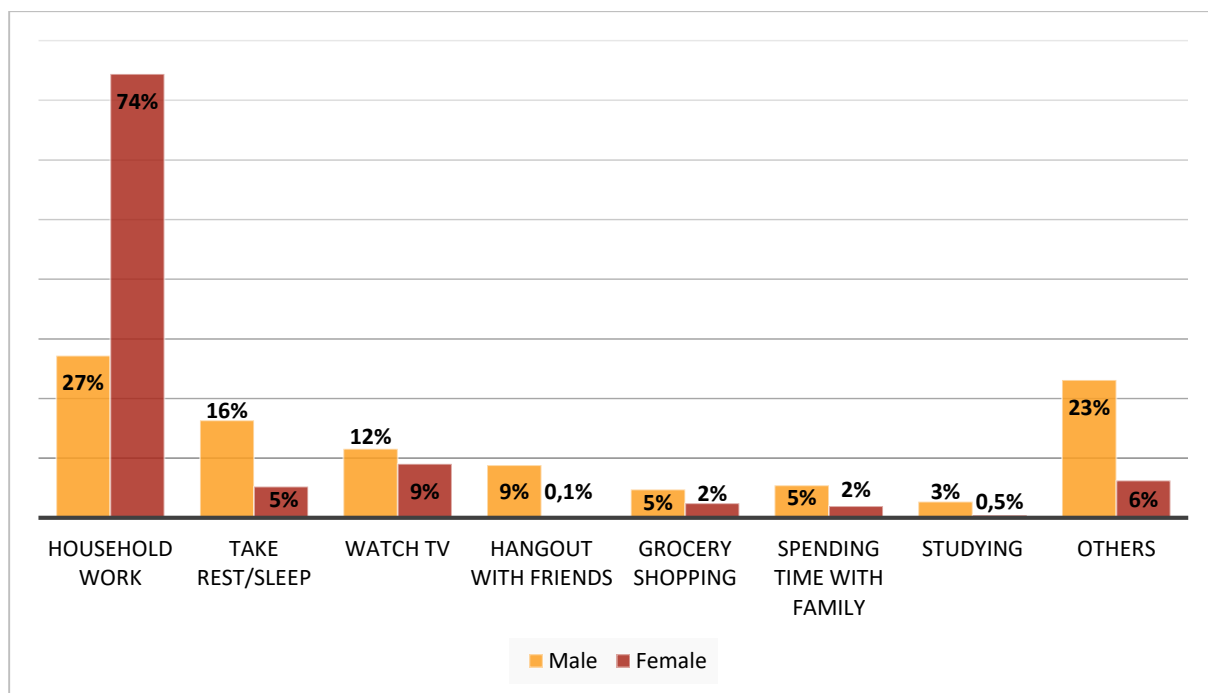


Figure 43: Distribution of respondents by activities after work and gender

When more time available, almost one-third of the workers mentioned to travel to the village in their home district (see Figure 44). There is a social obligation for the workers to visit their family and relatives on Eid-ul-Fitr and Eid-ul-Azha, which is the only time in the year to get a few days off from work. They give presents and often provide financial support to family members outside Dhaka. This activity is so important for the social lives of the garment workers and explains the high values in both surveys. For female workers the second most highly rated activity was taking a rest and sleeping (17%), as compared to only 8% of the male workers, which illustrates the exhaustion female garment workers must have endured. Some workers dedicate to additional artwork (handicraft, tailoring) that might valorise. It is intriguing that 16% of the male workers interviewed looked for an additional income source in their holidays, whereas women apparently lack both time and energy to make such an effort. This shows that wages in the RMG sector are often insufficient to make ends meet.

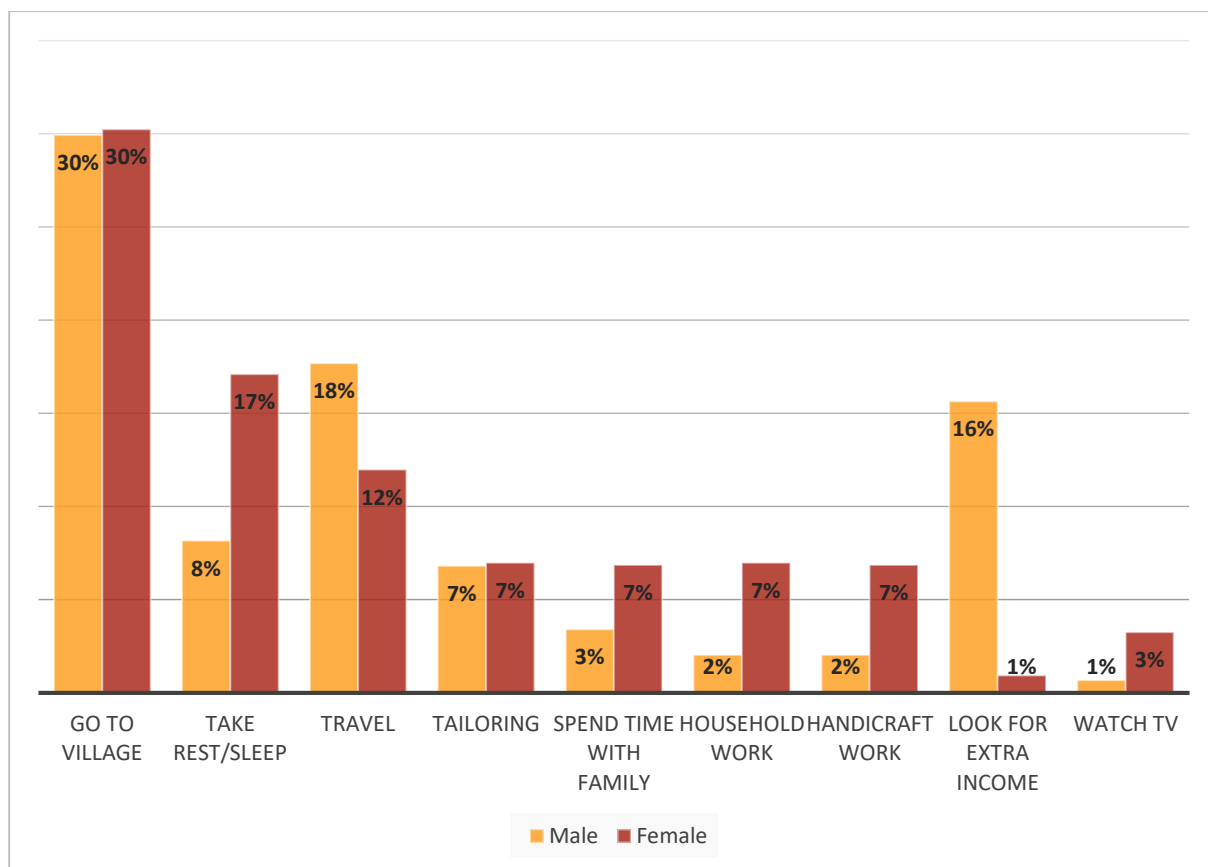


Figure 44: Distribution of respondents by preferred recreational activities if time is available and gender

In a nutshell, the gender imbalance of garment workers spending time outside their regular work is stronger than in any other category researched above. The export-oriented RMG industry hinges on a predominantly female workforce whose capacity to rest and recover is curbed by family-related responsibilities. In other words, Bangladesh's RMG industry builds its export bonanza upon the stressed and fatiguing shoulders of exploited women. This seems to go well as long as women are less unionised, more docile and controllable, have less bargaining power and demand less pay for work – traits that are traditionally ascribed to women. Once the female workforce emancipates from overcome social conventions, Bangladesh's government and employer organisations will have to rethink their strategy of exploiting women and provide sustainable working conditions equally to men and women.

4.16 Future plans

The business model of Bangladesh's garment industry rests on young, unmarried female workers from rather rural and poor families with little education. Low-skilled workers can be easily replaced, which increases the employee turnover that entails substantial implications for productivity. While the industry is quick to adapt, the daily work on assembly lines has kept garment workers in monotonous, painful and mind-paralysing routines.

Asked for their aspirations and future plans in life, most of the workers interviewed have a clear vision of what they want in life (Figure 45). The workers are concerned about the education of their children (18%), and dream of building an own house (18%) or starting an own business (17%).

A gender-focused analysis produces a slightly different view. As women dedicate most of their time to family and household matters, they were much more concerned about their children's education (20% vs. 9%) and their living situation, 19% (vs. 10%) wanted to build an own house, than men. For the most part, they stuck to their traditional role tending to family matters. By contrast, 40% of the male workers would like to become independent and would go for an own business, whereas only 14% of the female respondents thought of a career in the RMG sector. They rather would like to open a tailor shop (9%), i.e. choosing survival strategies on an artisanal basis over business in a manufacturing industry. This illustrates very well how reserved and cautious women still are when it comes to become more entrepreneurial.

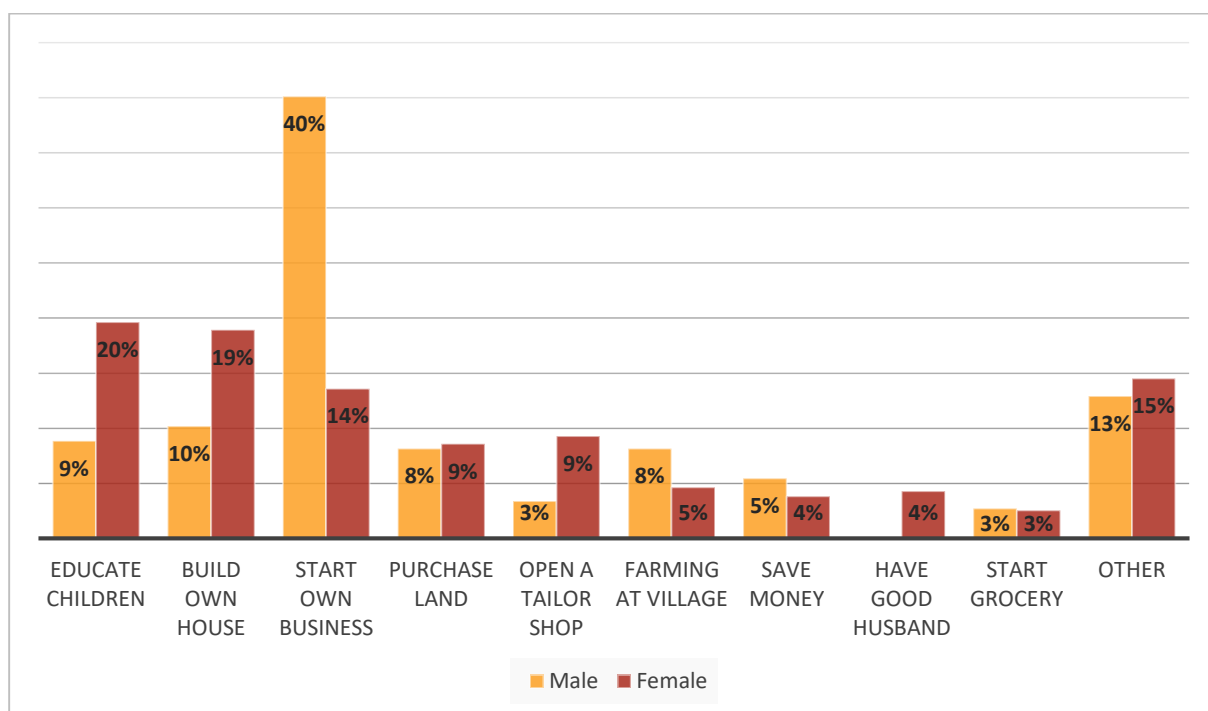


Figure 45: Distribution of respondents by future plans and gender

The answers in 2013 were differently ranked. Then, starting an own business (25%) was followed by saving money (22%), educating children (16%) and building a house (12%). In 2016, only 4% of the workers seemed to be willing or able to save money, which indicates diminishing real wages. The best interest of children and family reflected by the idea of investing in education and home is paramount.

It is necessary to create a gender-friendly environment that allows women to take up employment on sustainable conditions or start their own SME business. Policies and

programmes should provide opportunities for women not to end up in informal, home-based work. Inter-/national development programmes need to promote female entrepreneurship, strengthening their participation in the economic sector. Some of the main requirements are capacity building and trainings that provide knowledge and information on starting-up a business. It requires structural changes in Bangladesh's society to integrate women more equally into social and economic life.

4.17 Wishes

In the end of the interview when asked for their biggest desire, the participants reassured their previously mentioned plans for a better future. Figure 46 shows that in total educating children (37%) was on top of the priority list, followed by building an own house (18%), starting an own business (12%) and having a happy family (6%).

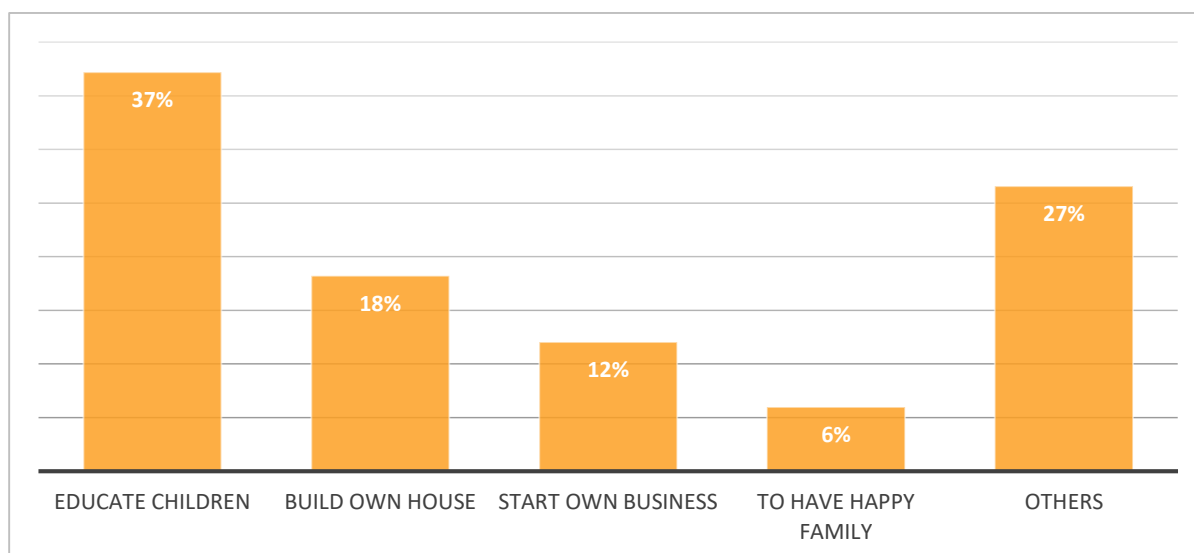


Figure 46: Distribution of respondents by biggest wish

Figure 47 provides a more differentiated, gender-specific picture. Similarly to their future plans (see Section 4.16), women cared much more for family-related issues than men. The difference in educating children and building an own house between male and female workers is remarkable. On the other hand, male workers prioritised starting an own business over family issues, which again confirms their socially engrained self-image of breadwinner. The category "other" includes responses such as to have savings, to be a housewife, to lead a better life or to send the husband/children overseas, amongst others.

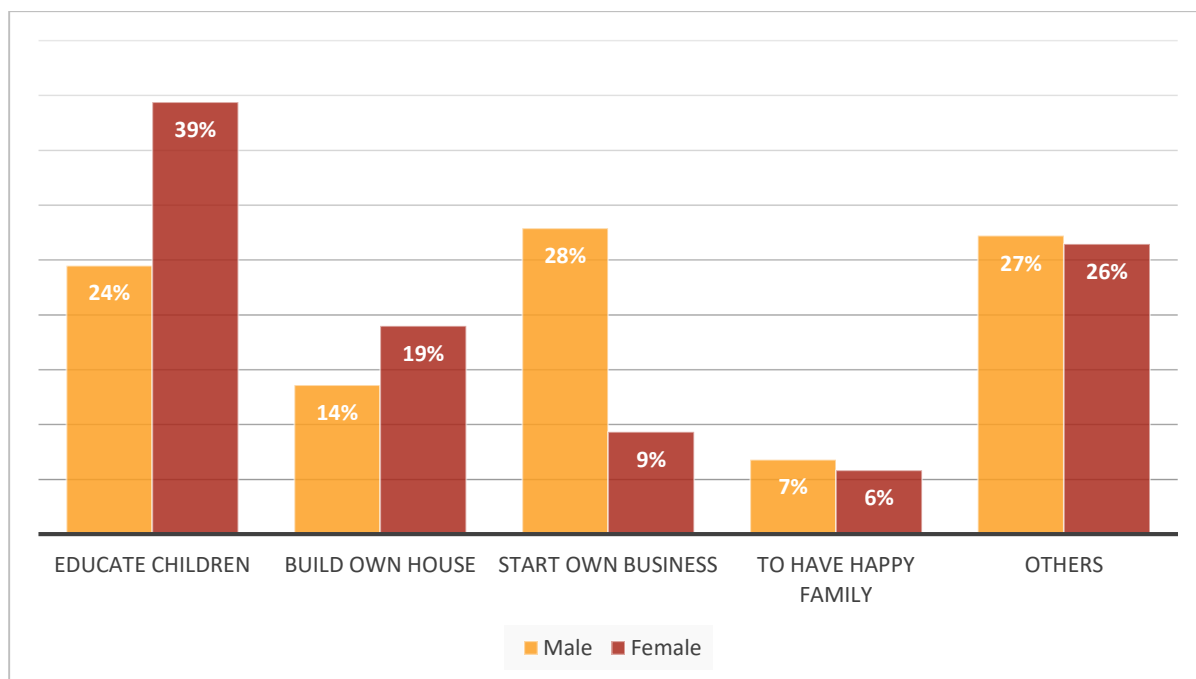


Figure 47: Distribution of respondents by biggest wish and gender

Garment workers endure atrocious working conditions just to hope for a better future. Their humble wishes reflected their intrinsic desire for social mobility, which currently is being denied by the harsh conditions in the factories that produce brand garments for all over the world.

The RMG industry is the only sector in Bangladesh that provides opportunities to low-skilled people on a very large scale. Women could benefit most from their integration in economic life, but are discriminated and exploited. It is the responsibility of the Bangladesh government, employers and international buyers and brands to pay heed to the workers' requests and create an environment that ensures compliance with national labour laws and international standards.

5 Challenges and Recommendations

The survey revealed some challenging working conditions in the factories, which can only be addressed in a multi-stakeholder approach. There has been progress in some of the indicators in comparison to 2013. However, the much-invoked paradigm shift after Rana Plaza did not materialise. With the chasm between male and female workers laid bare in this study, gender equality analysed as a crosscutting objective has been identified as the primary challenge.

Education

Women are culturally constructed as docile, invisible, nimble and to have a caring nature of family responsibilities. These stereotypes are reproduced on the factory level and need to be structurally addressed. With boys being culturally more valued in the Bangladesh society, gender disparities in access to schooling leave girls less qualified for employment. Despite a substantial decrease of garment workers with no formal schooling over the past three years, female participants had less years of schooling and less degrees than their male counterparts. The gender-education gap widens, the higher the education. Male workers carried out more skilled operations than females, who predominantly become shop-floor operators, and took up more qualified employment (e.g. quality control). It is important to provide an equal access to schooling and encourage girls in particular as educated workers are able to carry out more complex processes and activities, resulting in more valuable products that makes Bangladesh's RMG sector move up the value chain.

Occupational safety and health

The competitive requirement for low-income countries to cut labour and production costs puts pressure on the workers to meet daily production targets. Inadequate working conditions such as excessive work hours impact on the workers' health and safety. They can generate unexpected indirect costs for companies in terms of accidents, injuries, absenteeism, lower productivity, and high worker turnover, leading to new employees to be recruited and trained. Although less garment workers suffer from illness than in 2013, female workers are greater exposed to physical ailments than male workers, which is supposedly related to their parenting and household chores. Almost one-third of the workers suffered at least one accident at work. Training and education on safe and healthy workplaces accompanied by audits and inspections that aim for effective improvement instead of just analysing faults are required to ensure health and safety at the workplace.

Working hours

Low wages and high order volume within a highly competitive garments manufacturing industry worldwide are the main drivers of long working hours. The low regular income is insufficient to cover basic needs, obligating the workers to do overtime 'voluntarily'. Despite the discouraging structural conditions, excessive working hours have been considerably reduced since 2013, albeit at the expense of an increase in 10 hour-shifts. The results suggest that factory owners have made an effort to comply with labour laws, which may be a result of an improved auditing

and labour inspection system along with more awareness and pressure from buyers, international brands and retailers.

The main responsibility for the implementation of minimum wages and working-time legislation lies with the Bangladesh government. It is necessary to strengthen the Labour Department and reinforce the inspection system established within the NTPA. Private compliance initiatives and corporate social responsibility (CSR) projects are complementary to an effective national labour regulation. Alone they fail to deliver better results in terms of working conditions.

Exposure to abusive behaviour

Mistreatment, threats and other abuses represent a widespread culture in Bangladesh's garment sector. The conditions seem to have worsened since 2013. Male workers were more inclined to resist to inappropriate behaviour with protests, complaints and resignations, while women sought to avoid further abuses by focusing on doing better work, thereby conforming to their subordinate position in society. It is mandatory to create a supportive environment for women that introduces respect and dignity to the factory floor level. Setting up complaint mechanisms, such as anti-harassment committees and violence prevention systems, could be a first step to eliminate harassment and violence against all workers. Participation from within the workforce is required to implement such initiatives successfully. The dialogue approach can be useful to integrate workers, supervisors and management in devising better strategies to improve working conditions. Buyers need to pressure their suppliers to provide an atmosphere in the factories that is devoid of violence and abuses.

Attractiveness of RMG industry

Working conditions, or maybe just the reputation of the RMG industry, possibly have changed as in 2013 the garment industry was by far believed to provide better facilities than other economic sectors. This sample's responses imply that family matters have dramatically gained importance in joining the RMG sector, while the industry itself seems to have lost its appeal as an attractive employer. Being the only industry in Bangladesh that provides low-skilled employment opportunities on a large scale, the RMG sector is unlikely to face a shortage of labour. However, the government and employer organisations need to ensure better working conditions and effective enforcement mechanisms of labour laws to create an industry that is capable of providing a low-skilled workforce a chance to develop. Moreover, better working conditions are a prerequisite for moving to more value-added operations, attracting a better qualified workforce.

Perception of workplace

What matters most to the workers interviewed is a good and respectful working environment and the timely payment of salaries and overtime. Surprisingly, an increase in wages was not relevant to the participants, probably thanks to an average salary (6,183 BDT) that is quite above the minimum wage (5,300 BDT), although the average salary of women is far below that of their male co-workers. This indicates the participants were of the view that they received a decent payment. Bangladesh's minimum wage still is one of the lowest in the world.

Irrespective of the workers' perceptions, it is necessary to make information available to them regarding the actual share of their wages in the final product. Labour education should create awareness of their rights, particularly to that of a fair income. As in 2013, the workers' primary concern was to secure their livelihood, while there was no awareness of their rights to collective bargaining and freedom of association. In Bangladesh as in other Asian countries collective bargaining at the factory level is the most common approach to negotiate wages, working hours and working conditions. Such agreements are weak. It is mandatory for the Government of Bangladesh to set and regularly increase the minimum wage, which is complemented by collective bargaining agreements between employers and workers at both the factory and the sectoral level. This would eventually enhance compliance with ILO Convention No. 98 on the Right to Organise and Collective Bargaining.

Housing and transportation

Considering the relatively lower average income, female workers are more burdened by housing expenses than their male co-workers. Close proximity of factories and homes is essential for the low-paid workforce. Most of the workers commute on foot to their workplace, even if they do not live within a reasonable walking distance, exposing themselves to unsafe roads. Harassment-related incidents are common but rarely reported. It is paramount for the government to ensure road safety and for the factory owners to provide their workers safe and cost-free passage on their daily commute. Moreover, it requires low-cost housing programmes for garment workers to ensure dignified living conditions and reasonable travel time and costs.

Activities outside the factories

It is astounding to realise that Bangladesh's massive export earnings from the RMG industry are built on a female workforce whose engagement in household and family-related activities is being eroding their work capacities. The gender discrepancy is nowhere more visible and adds to the multiple disadvantages female workers have to endure. While factories lack facilities for working parents, it is the workers themselves who are not aware of a lack of such infrastructure. This is all the more important as workers over 40 of either gender are scarce in Bangladesh's RMG sector. Besides a different mentality that encourages male family members to provide more support in raising children and household work, factories need to embrace working mothers, ensuring leave and day-care facilities.

Future plans and desires

Much can be told from the workers' wishes and future plans. As opposed to the last Workers' Voice report, saving money virtually seems to be no option anymore, which indicates diminishing nominal wages. Female workers seek the best interest of the children and the family, planning to invest in education and home, while male workers are more inclined to start an own business. As for the women's own professional career, it is of paramount importance to create a gender-friendly environment that allows them to take up employment on sustainable conditions or start their own SME business. Besides a structural change in Bangladesh's

society, it requires development programmes with capacity building and trainings to promote female entrepreneurship, strengthening their participation in the economic sector.

6 Conclusion

The Workers' Voice Report 2016 showed that the conditions of work in Bangladesh's RMG industry continue to be unacceptable for most of the workers. The focus of the reforms after Rana Plaza was directed on factory safety. The efforts made have not been enough to improve overall working conditions. There is more initiative from all stakeholders needed to create a decent work environment. Therefore, it is important to bring all stakeholders together and identify their responsibilities and roles in improving working conditions. Government, employers, workers and international buyers need to jointly address the manifold challenges in eliminating work deficits, providing a more effective regulatory environment and establish institutionalised multi-stakeholder cooperation.

The Government of Bangladesh has to make greater efforts to rigorously enforce existing labour laws if Rana Plaza should be the turning point. It needs to define a wage level that is able to satisfy the basic needs of the workers and periodically review it to adjust it to real prices. Only through sufficient inspection and legal capacities decent payment can be enforced.

Private governance based on voluntary external audits and internal codes of conduct has proven ineffective to substantially change the conditions in Bangladesh's RMG factories. The Accord on Fire and Building Safety operated by mostly European retailers and the Alliance for Bangladesh Worker Safety, a group of North American retailers, have been conducting a series of inspections with little progress though as confirmed by other studies⁸. Such initiatives will only be successful if they achieve to inspect and monitor the entire of the export-oriented factories including their subcontractors. Buyers and retailers need to collectively support the workers' rights to freedom of association and collective bargaining in their supply chains. More pressure from them is required to push factory owners towards compliance with national labour laws.

It is about time to change the mind-set of employers. Producers see workers largely as a cost that must be kept down. They could be more profitable if they paid higher wages and provided a better work environment. Satisfied employees are more productive and contribute greater returns to the companies.

Bangladesh's RMG industry faces a number of challenges to remain competitive in the global market. However, it is the workforce they depend on and whose capital it compromises. International buyers appreciate the combination of moderate prices at reasonable quality for very large quantities in the low and mid-market segment. It is important for them to understand that productivity and efficiency improvements can only be addressed in alliance with labour standards. Here is where solutions have to focus on.

⁸ Human Rights Watch 2015: *Whoever Raises Their Head Suffers the Most: Workers' Rights in Bangladesh's Garment Factories*. United States of America; Khan, Mohd Raisul Islam; Wichterich, Christa 2015: *Safety and labour conditions: the accord and the national tripartite plan of action for the garment industry of Bangladesh*. Working Paper No. 38. Global Labour University. Geneva.