







Inspiring Excellence

Where are the women?

A study on the declining number of women workers in the Bangladesh RMG industry

Summary report



Women no longer comprise 80% of the labour force in the RMG sector

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Overview

Over the past 40 years, the growth of the ready-made garment industry (RMG) in Bangladesh has generated considerable formal employment opportunities for women.

The industry has made women more visible in the labour market and empowered in society. The emergence of the garment industry as a major employer of women workers, has seen wider challenges against societal restrictions for women in Bangladesh. Over the last ten years, the early morning commute in Bangladesh's major cities- Dhaka and Chattogram - has seen thousands of women making their way to work in garment factories (Rahman, 2014). In recent years, however, the proportion of women workers in the sector has steadily declined. Women no longer comprise 80% of the labour force in the RMG sector – the most recent estimates show this figure is now less than 66%. These changes have significant implications for women's economic empowerment, as well as the well-being of their families and communities. Jobs in garment factories not only afford women workers financial security, but also a sense of security for the future. This is changing and there is a need to understand why.

This research was conducted by <u>BRAC University in Bangladesh</u>, with funding from GIZ and Ethical Trading Initiative Bangladesh, through the <u>Sustainable Textile Initiative: Together for Change (STITCH)</u>, supported by the <u>Ministry</u> <u>of Foreign Affairs of the Netherlands</u>. The research team comprised of Dr Shahidur Rahman (Lead Researcher), Dr Wasiqur Rahman Khan and Dr Shibly Shahrier (Co-Researchers), and Shaan Washique Akbar (Research Assistant). The summary report has been prepared by the <u>Ethical Trading Initiative</u> (ETI) to support dissemination of the findings. For access to the full report, please contact ETI Bangladesh (<u>munirshamim@etibd.org</u>). The lead organisations would like to acknowledge the Informal Workplace-Based Dialogue Network (WBDN) for highlighting the need to conduct this critical piece of research.

Methodology

The objectives of the study were to understand the factors behind the declining proportion of women in the sector and explore the implications of this change for the industry.



- a Entry into and exit from the RMG industry
- Reasons for entry and exit by women workers in the RMG sector
- c Implications of these changes for women's participation in the RMG sector

To support this investigation, quantitative data was collected by surveying 337 factories, 370 current women garment workers, 285 former women garment workers, and 183 potential women workers. The qualitative data included nine focus group discussions (FGD) with 89 participants, of which five were with former workers, two with current workers, and two with potential workers. In addition, 16 key informant interviews (KII) were conducted drawing on key stakeholder groups in the industry such as buyers, suppliers, experienced workers (male and female), mid-level factory management, supervisors, international NGOs, buying houses, research organisations, trade unions, academics, development partners, business associations and government organisations. All primary data was collected between August and October 2022.

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Demographic characteristics of sampled workers

- Current workers were in their late 20s (31%) and early 20s (22%); former workers were in their early 20s (31%) and late 20s (27%). This group also had a significant portion (35%) over 30s. Most of the potential workers were teenagers between the ages of 15 and 19 (39%), followed by women in their early 20s (35%).
- Most of the sampled current and former workers had primary-level education.
 Potential workers had secondary and postsecondary education.
- All of respondents were married; only potential workers had a higher percentage of unmarried respondents (27%).

Qualitative data collected through:

- As most of the respondents were married, their spouses were the heads of households. Majority of respondents were living as a single family in rented accommodation.
- Majority of current workers

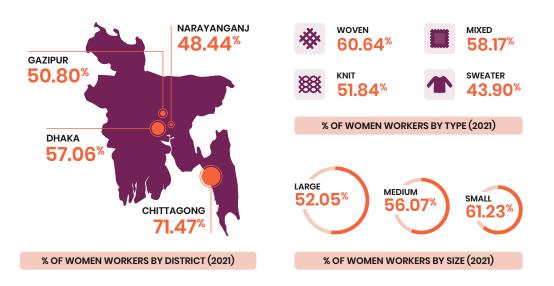
 (44%) worked in large factories, with 37% working in woven and 35% working in knit factories. The typical occupation for this category of workers was operators (74.58%).
- In terms of earnings, workers had an average salary from 8,000 (£63) to 10,000 (£80) taka (37%) followed by 10,000 (£80) to 12,000 (£95) taka (30%).

Quantitive data collected by surveying:

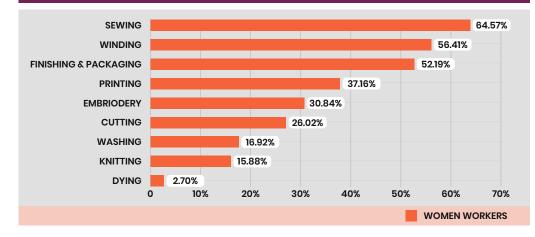


Main findings

The research found that the proportion of women garment workers has continued to decline from 54.22% in 2015, falling slightly to 53.89% in 2018 and 53.65% in 2021. This is a significant decline compared to 1980s when 80% of the workers in the sector were women.



Graph 1: % of women workers across various production processes (2021)



Graph 2: % of women workers in the Bangladesh RMG sector (BRAC University study)



Graph 3: % of women workers in the Bangladesh RMG sector





To find out the factors behind the declining proportion of women garment workers, the factory surveys examined whether more workers have been leaving their jobs in garment factories (**exit**), fewer workers were entering the sector (**entry**) or a combination of both.

EXIT -----

Among workers who left the RMG sector in 2021, 51% were women compared to 49% in 2015 – this shows a slight increase in exit numbers.

An overwhelming majority of the workers who left the sector (89%) responded that their departure was voluntary in that their contracts were not terminated by factory management. Rather due to the reasons outlined below, the women workers had to leave their jobs in the RMG sector.

According to the survey of former women garment workers, caring for children was the main reason for leaving their jobs, followed by pregnancy, age appropriateness, and difficulty balancing home and work responsibilities. Factors related to working conditions were also identified as reasons for leaving, which included harassment and violence, long working hours, and low salaries. These findings were also consistent with results from the surveys of factory management, where **40%** of factories identified the family situation as the key reason for female workers leaving their jobs, followed by working conditions (**15%**).

Simply put, women workers are choosing to leave their jobs in the RMG sector because they are finding it difficult to balance paid work with unpaid care responsibilities, most notably caring for their children. In households where there are more women present, this would imply additional support for childcare and domestic responsibilities, thus enabling a woman to focus more on her job. Other factors highlighted were an increase in the number of children in the household, as well as the number of school aged children, all of which increased the likelihood of exit from the industry.

Table 1: Reasons for exit cited by former women RMG workers (2021)

REASON	% OF WORKERS	REASON	% OF WORKERS
CARING OF CHILDREN	26.67	GOT MARRIED	2.46
BECAME PREGNANT	17.89	NEGATIVE EFFECT TO HEALTH	2.45
AGE APPROPRIATENESS	11.93	WORK STRESS	2.11
HOME AND WORK IMBALANCE	10.52	LONG DISTANCE FROM HOME TO WORK	0.70
INCREASED INCOME OF HOUSEHOLD	6.32	DIVORCE	0.70
HARASSMENT AND VIOLENCE	4.56	DON'T FEEL SAFE	0.35
LONG WORKING HOURS	3.51	NOT FINDING HOME CLOSE TO FACTORY	0.35
LOW SALARY	3.16	CAN'T ATTEND TRAINING	0.35
DON'T HAVE REQUIRED EDUCATION	3.16	LOWER SOCIAL STATUS	0.35
NOT ALLOWED TO RE-JOIN	2.46	TOTAL	100%

For pregnant women, the research revealed discrimination against them, hence why pregnancy is noted as a key reason for leaving a job in the RMG sector. For example, an FGD participant observed that if women became slower at completing tasks during pregnancy, supervisors intentionally subjected them to verbal abuse to prompt them to quit. A former RMG worker did not ask for leave when she felt weak during pregnancy, as she knew from experience that she might be fired or made to leave. As a result of this discrimination, pregnant women workers are opting to leave their jobs in the sector.

Further insights behind 'working conditions' as a reason for leaving the sector, were gathered from FGD participants. Firstly, respondents noted the displeasure of their families on having to work overtime, given that it forced them to stay late into the night, preventing them from fulfilling responsibilities at home. This was also consistent with findings from the survey of former workers, where **63%** agreed that their work hours were long.

Furthermore, FGD participants noted that factories put excess pressure on workers by requiring them to produce upwards of 180 to 200 units every hour. However, a worker can typically produce an output of 100 to 120 units in an average workday. They were asked to double their output which was impossible to handle. Due to this pressure, workers were usually not granted leave in case of a family or medical emergency. One of the participants mentioned cases of repeated verbal abuse by their supervisors, as being the reason behind her exit from the garment factory.

To understand if current women garment workers are likely to leave their jobs in the short or long run, respondents were asked, "Do you have any plans to leave the RMG sector and move to a different sector after one year (short run) or after five years (long run)?". Overall, the survey found that 8% of all current women workers wanted to leave the RMG sector after one year and 27% after five years. They also identified their family situation (41%) as the primary reason for any thoughts related to leaving the job, followed by moving back to their village (20%), working conditions (18%), moving to a different job (13%) and age appropriateness (8%).

It was also observed that female workers are **15%** more likely to leave garment work in the long run if they experience any harassment. Leaving a garment factory job also increases by **3%** when there is a fear of miscarriage or if there was need to work on weekends. On the contrary, female workers are **7%** less likely to leave if they felt safe from accident, **12%** less likely to leave if they receive training for automation, and **7%** less likely to leave if good healthcare facilities are provided.

Upward mobility is extremely limited for women garment workers. About **86%** of workers joined the factory as helpers, **66%** left as operators and only **1%** as supervisors. Surprisingly, none of the former workers noted '*lack of career progression or upward mobility*' as a reason for leaving the sector. It appears women have accepted the norm that they can only work as helpers or operators reporting to male line managers and supervisors, despite the data showing that women supervisors had higher productivity levels compared to men. About 86% of [women] workers joined the factory as helpers, 66% left as operators and only 1% as supervisors.

Further investigations into the reasons for low female supervisors through FGDs and KIIs revealed the following:

- Male workers find it difficult to accept the fact that a woman is their supervisor;
- Male line chiefs cannot come to terms with working with a women supervisor, as they cannot reprimand her;
- Female workers cannot work the long hours required for these roles, as they need to go back home to their families;
- Women workers also don't want to work under female supervisors;
- Supervisor salaries are fixed whereas operators can work overtime and earn more.

Preferred jobs in nongarment sectors cited by respondents include hospital support staff, tailoring at home, teaching, and other sectors.



ENTRY ------

In addition to understanding factors that have led to an exit from the industry, this study also examined reasons why women choose to work in the sector in the first place.

The factory survey of this research found that the share of women garment workers entering the RMG industry declined from **54.38%** in 2015 to **52.67%** in 2018 but rose slightly to **53.87%** in 2021.

Two major factors explain entry into the RMG sector:

- Preferred occupation of potential women workers
- [2] Recruitment policies of RMG factories

According to the survey of potential women workers, **54%** preferred to work in the RMG sector whilst **46%** would rather to be employed in non-garment sectors. Determining factors of job preferences were education, location and commute time, marital status, number of children, family structure, household income, and time for household work. Preferred jobs in non-garment sectors cited by respondents include hospital support staff, tailoring at home, teaching, and other sectors. Reasons for preferring non-garment sector jobs put forward by participants in the FGD were as follows: flexible timings, easier commute, personal independence when it came to workload, more understanding supervisors in other professions compared to garment factories, and no verbal abuse.

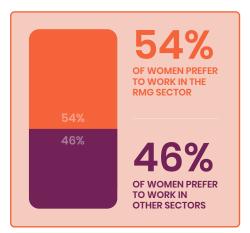


Table 2: Preferred occupational choices of potential women workers (2021)

PREFERRED OCCUPATION	%	PREFERRED OCCUPATION	%
GARMENTS WORK	49.73%	OFFICE ASSISTANT	3.28%
HOSPITAL JOB	10.93%	BANK JOB	2.19%
TAILORING	8.74%	BUSINESS	1.64%
TEACHER	7.10%	HANDICRAFT	1.64%
PRIVATE JOB	4.92%	NGO JOB	1.09%
SALESPERSON	4.92%	OTHERS	3.85%
		TOTAL	100%

Additionally, potential women workers with higher levels of education preferred not to work in the garment sector, as they believed these jobs are for people with limited education and skills. There was also a perception that these jobs were not as respectable compared to working in a hospital or supermarket.

It is interesting to note that preferred occupations are in the service sector and require at least secondary level of education. When the RMG industry emerged in Bangladesh in the 1980s, employment options were limited for women from lowerincome groups. However, as the economy grows, the service sector has opened diverse opportunities for women. Although no single industry can provide work for millions of women from the lower income brackets like the RMG sector, it is positive to see a rise in non-garment jobs.

The research also examined the recruitment policies of RMG factories and the perceptions of management in terms of the gender of their workforce. The study found that the skill sets preferred by factory management were more aligned with that of male workers. For example, in 2021, factories preferred to recruit workers who could work long hours, have less family engagement, able to handle machinery, adapt to changing work patterns, and have the required education and training. Nowadays, suppliers are more inclined to recruit educated workers, as is evident in the factory survey. However, educated women workers are not attracted to this industry. There could be several explanations for this, including poor working conditions that result in physical

and psychological stress, or limited opportunities to move up the career ladder. It might also be the case that wages in the sector simply do not reflect the value of higher educational attainment.

> "Now, the potential workers have even more options and opportunities. There are a lot of industries other than garments. For example, in the leather industry, a lot of new demand is being created for labour. A lot of online businesses are creating demand for work. Restaurants have increased in number and have increased in demand. Even small entrepreneurs need helping hands nowadays. Mobile financial services have opened many doors for women by allowing them to produce goods and services at home, sell them to other market players, and get paid digitally. This will enable them to do business with people from all over the country. A lot of big businesses now source from rural areas.

Furthermore, many NGOs and development partners support women in this regard. It is not like women are no longer interested in garments, but women with socioeconomic ability are now trying to be independent and looking into entrepreneurial opportunities."

Extract for key informant interview with a leading researcher in the sector.



Implications of a decline in the number of women workers in the RMG sector

The implications of a decline in the number of women workers in the Bangladesh RMG sector have been analysed from four perspectives:



Former women garment workers





Country







Former women garment workers

The survey of former women garment workers found them involved in three types of activities since leaving their jobs in the sector: unpaid family labour (76%), unemployed but searching for a job (16%) and paid employment in a different sector (8%).

Unpaid family labour includes caring for children, elderly parents, in-laws and engaging in other domestic chores. Societal norms typically dictate the division of household labour with the care responsibilities in the home largely falling to women. This research has shown the challenges women garment workers face in terms of balancing paid work in factories and unpaid care responsibilities, ultimately resulting in an exit from the sector. Although Bangladesh Labour Act of 2006 mandates factories with 40 or more female workers, to provide one or more suitable rooms to cater for children under the age of six, the reality is that these facilities are barely functional. Workers are also concerned for the safety of their children and prefer to leave them with relatives where possible. Private childcare facilities are limited and expensive. Therefore, the lack of affordable and quality childcare options exacerbates

the challenges of balancing paid and unpaid care work and contributes to women leaving their jobs.

The trade-off between unpaid care and paid work has also come at a financial cost for women workers. The study showed that the monthly income of former RMG workers reduced significantly from taka 9,189 (£72) to taka 1,500 (£12), as the majority had no alternative income generation activities. This has also had an impact on their social networks, agency, and worker voice. Many women rely on the network of friends in the factories for support in all aspects of life and losing this has far reaching implications, including feelings of isolation.



Factory operations

Despite being the second largest garment exporter in the world, Bangladesh has a per hour labour productivity of \$3.4, whilst Vietnam, India, Pakistan, Myanmar, Sri Lanka, and China are priced at \$4.7, \$7.5, \$7.7, \$4.1, \$15.9, and \$11.1 respectively (Asian Productivity Organization, 2018).

To overcome this problem, it is essential to retain workers who are skilled enough to produce more garments. This study found that the decision by skilled women workers to leave the RMG sector is likely to impact on labour productivity, an issue which factory management seem fully aware of. For instance, some former women workers noted during the FGDs that their factory supervisors were pressuring them to return to their jobs.

Likewise, women leaving their jobs in the RMG sector means factories must make an effort to advertise for jobs, search for workers that match their expectations, recruit and organise orientation/training programmes. This takes significant investment, of both time and money and takes away from other efforts to improve working conditions.



Due to historic trends of employing large numbers of women to work in the sector, many buyers have and continue to implement workplace programmes in factories that support women workers with, for example, leadership skills, sexual and reproductive health, financial literacy, and inclusion. With the number of women workers declining, this is likely to impact buyers in a similar manner as factories, in that costs of production could increase. A high turnover of

Implications of a decline in the number of women workers in the RMG sector continued

workers could also mean delays on delivery of orders and increased risks of subcontracting by factories to meet to production deadlines. This means buyers must be more intentional with their due diligence of factories and support them to understand why women workers are leaving their jobs and what additional measures can be taken to retain them.



Country

Finally, the impact that jobs in the RMG sector has had on advancing gender equality women's economic empowerment in Bangladesh cannot be overlooked.

Several key stakeholders who participated in this study as key informants, agreed that the RMG sector has helped boost the economy of Bangladesh greatly and lifted many out of poverty. However, if their representation continues to decline, it will likely reverse the economic gains made by the country and for women in particular, as well as impact the country's efforts to meet its development objectives around Sustainable Development Goal 5 on gender equality and women's empowerment, and commitments under the national development plan Vision 2041.



The RMG sector has helped boost the economy of Bangladesh greatly and lifted many out of poverty.

THE ROLE OF AUTOMATION ---

Although automation was not cited as a major factor behind workers leaving the sector, the study did find that the percentage of women workers decreased in cutting and sewing processes, whilst the average number of machines increased.

Despite arguments from factory management that women workers were not positive towards automation the survey of current and former workers revealed the opposite. Young workers in particular, are keen to embrace technological changes and are willing to learn on their own through observation and practical training. FGD participants in the former and current worker categories, argued that there is a lack of training on automation and a stereotype that female workers are more averse to using technology with some management personnel believing women cannot handle technology. This stereotype does not bode well for progress towards gender equality and women's empowerment going forward. Most of the FGD participants said they were not worried about using technology although some machines required physical effort, for which male workers were preferred, and some education was required for specific tasks like quality checking. However, women workers said they could compensate for a lack of education with experience. Experience played a significant

Implications of a decline in the number of women workers in the RMG sector continued



role when it came to who got to operate such machines and usually senior operators were preferred.

However, the adoption of new technologies does not always bode well for employment opportunities in the sector. For example, FGD participants who worked in a sweater factory noted the following:

"With the arrival of jacquard machines, we sweater factory workers have been forced into the streets. One of those machines can replace four workers, and four machines require only one operator to function."

This implies that with the adoption of new technologies in sweater factories, 16 workers can now be replaced by a single worker. Although technology does help factories realise certain benefits such as reduction in waste and efficiency gains, this has a negative impact on employment opportunities for all workers in the sector.

Another negative impact of automation has been an increase in workload and targets. FGD participants noted that with the introduction of automation and overall increase in wages across the sector, expected outputs for workers have also increased. They are now required to produce between 200 and 250 pieces per day, when in reality, feasible production targets are between 100 and 150 pieces per day. As highlighted by an FGD participant: "Introduction of new machines caused some problems; one machine can perform three different processes done by three individuals previously. Hence, the person operating that machine must take three times the normal workload. However, our production targets have not decreased."

According to research by McKinsey & <u>Company (2021)</u>, suppliers in Bangladesh will need to invest in upskilling, vertical integration, digitalisation, and automation to remain competitive in the global garment supply chain. Stiff competition lies is ahead - Bangladesh is going to lose its preferential trade agreement with the EU as it graduates from a least-developing to developing country status. At the same time, Vietnam, Bangladesh's main competitor in garment production, signed a new preferential trade agreement with the EU in 2020. Remaining competitive will therefore require investment in upskilling, with emphasis on training women garment workers to adapt to automation and other technological advances in the sector.

With the increased focus on circularity in the fashion industry and pressure on factories to adopt environmentally friendly production practices, there is likely to be an increase in automation of certain processes in the future. It is critical that women workers are not left behind or excluded from this transition to cleaner and more efficient production methods.

COVID-19 PANDEMIC -

Like many other industries globally, the RMG sector in Bangladesh was also significantly affected by the Covid-19 pandemic.

At the end of April 2020, orders worth more than \$3.17 billion had been cancelled (BGMEA, 2020), which led to a decline in Bangladeshi garment exports by **18%**, the highest decrease in its history (<u>The Economist, 2020</u>). It was assumed that the pandemic would be a leading cause for the declining proportion of women workers in the RMG industry. However, this study found Covid-19 to have very minimal impact on the reduction in numbers of women workers in the sector. According to the survey results, only **2%** of former workers identified Covid-19 as the reason for leaving their jobs, and **0%** in the factory survey.

Despite survey data, insights from an interview with a researcher revealed that some factories did use the pandemic as an opportunity to replace aged and uneducated workers with younger, educated ones. According to this researcher:

"A lot of closed factories reopened and they laid off old workers and employed new ones because experienced workers were generally paid more for yearly increments in salaries. A lot of open factories refused to take back some of their uneducated employees."

Recommendations

The emergence and growth of the RMG sector in Bangladesh has undoubtedly been the single most important development affecting the lives and livelihoods of millions of women in the country. The sector was the first to employ women in large numbers and provide a regular income, affording those employed with a new degree of economic empowerment and autonomy. While the composition of Bangladesh's RMG workforce still favours women, there has been a decline in their numbers from 80% in the 1980s to about 54% today.

Going forward, how can RMG factories stop the exit of women from the sector, retain skilled women workers and continue to attract more of them in future?



Recommendations for government

Recommendations for trade unions and worker representatives

Recommendations for civil society/NGOs representatives

Recommendations continued

Recommendations for factory management:

- Create a healthy work environment free from physical and verbal abuse by educating managers and workers, implementing appropriate grievance mechanisms to enable workers report such behaviour and reprimand offenders.
- Ensure regular payment of salaries with bonuses, overtime payment and social security including pensions; improve salary packages to not only retain current workers but also attract potential educated women workers.
- Review recruitment practices to ensure no discrimination against women and monitor retention and progression of workers using gender-disaggregated data.
- Reduce the demand on women workers to work overtime, especially in the evenings, by setting reasonable production targets and accepting realistic order volumes from buyers to avoid pressure on workers.
- Provide maternity related facilities include maternity leave as per government regulations, childcare and breastfeeding rooms; recognise the needs of pregnant workers and make appropriate adjustments to their work schedules; do not discriminate against pregnant workers and breastfeeding

mothers and ensure managers and supervisors who do are reprimanded and trained on appropriate conduct.

- Provide healthcare facilities that meet the physical, sexual, and reproductive health needs of women workers.
- Ensure the safety and security of women workers for example, providing transportation.
- Provide women workers with equal opportunities to adapt to automation, including organising training at time is that is suitable for them given their unpaid care responsibilities.
- Adopt a multifaceted approach to women in leadership positions, including behavioural change training for both male and female workers towards being more accepting of female supervisors, as well as leadership and technical skills for female workers.

Recommendations for buyers/brands:

Review purchasing practices, specifically around production planning – to ensure commitments can be met by factories without putting pressure on workers to do overtime; and sustainable costing – such that factories are able to pay living wages to their workers and invest in factory improvements.

- Move beyond audit-based non-compliance approaches towards effective gendersensitive human rights due diligence, to understand where there is actual or potential discrimination against women (particularly pregnant women). Work with factories to better understand the reality of working conditions for women workers through gathering gender-disaggregated data and regular worker surveys.
- Consider investing in programmes to support factories with provision of facilities to reduce the burden of unpaid care for women workers, for example wellresourced childcare and health facilities, transportation services.
- Incentivise and reward factories that invest in gender-sensitive workplaces that do not discriminate against women workers and provide them with opportunities to move up the career ladder.
- Monitor the impact of automation and technology advances that are likely to emerge as business models evolve, and ensure women workers are not left behind, for example, investing in upskilling programmes and understanding the impacts of new technologies on working conditions.

Recommendations continued

Recommendations for government:

- Review legal frameworks and policies specifically on maternity protections and ensure they are aligned with international standards.
- Invest in subsidised public childcare and early childhood facilities.
- Monitor employment trends for the industry and convene stakeholders including international buyers, business associations, civil society, and worker representatives to collectively address issues when necessary.

Recommendations for trade unions and worker representatives:

- Educate female workers on their rights in the workplace, specifically on what constitutes discriminatory behaviour, maternity rights, and health and safety rights.
- Engage in constructive social dialogue with factories to ensure the needs of workers are being met and the conditions of work are in line with labour codes of conduct.
- Encourage workers to raise their grievances (for example on unrealistic targets, physical or verbal abuse, and forced overtime) and work with factory management to find collective solutions andappropriate remediation.

Ensure union membership and worker representative structures are inclusive of women and their voices.

Recommendations for civil society/NGOs:

- Support efforts by brands and factories to address women's rights issues and create gender-sensitive workplaces through workplace training and community engagement to tackle discriminatory social norms.
- Advocate for improved legal and policy frameworks that respect and protect women's rights in the RMG sector.

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For human rights, for better business

ETI is a leading alliance of trade unions, NGOs and businesses, working together with key stake- holders to promote practical solutions to end the abuse of human rights at work.

Our vision is a world of work that protects human rights, ensures dignity for all, provides opportunity and is free of exploitation and abuse.

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