

Ripped at the Seams: RMG Sector Workers During a Global Pandemic

Christopher Hansen

Research Methodologist and Principal Investigator, NORC at the University of Chicago

Jafar Iqbal

Principal Investigator, NORC at the University of Chicago

Maansi Parpiani

Principal Investigator, NORC at the University of Chicago

Ridhi Sahai

Principal Research Analyst, NORC at the University of Chicago

Vaiddehi Bansal

Senior Research Analyst, NORC at the University of Chicago

Mithila Iyer

Research Assistant, NORC at the University of Chicago

Michelle Davis

RMG Technical Expert, NORC at the University of Chicago

Kareem Kysia

Director of Vulnerable Population Studies, NORC at the University of Chicago

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Abstract

Authors from NORC at the University of Chicago conducted a five-month rapid assessment of COVID-19's impact on the Ready Made Garments industry (RMG) in Bangladesh and India with funding from the Global Fund to End Modern Slavery (GFEMS). The research presented here highlights the increased risk of forced labor among vulnerable working populations associated with the COVID-19 pandemic. The rapid assessment addresses descriptive and normative questions about the short- and long-term impact of the COVID-19 pandemic on Bangladesh and India's RMG industries. Qualitative data collection methods included 19 semi-structured key informant interviews (KIIs) with governmental and non-governmental stakeholders and actors across the RMG supply chain. KIIs were informed by a systematic review of recently published media articles, reports, white papers, and other online content. RMG sector stakeholders, including private sector supply chain actors, policy actors, and implementing partners, can use this research to adapt programs and address the multi-faceted challenges facing apparel workers during a global pandemic.

Key Words

Ready Made Garments industry; RMG; India; Bangladesh; forced labor; apparel

Introduction

The purpose of this rapid assessment is to understand how the coronavirus (COVID-19) pandemic is affecting vulnerable apparel workers in the Ready Made Garments (RMG) industry in Bangladesh and India. “Ripped at the Seams: RMG Sector Workers during a Global Pandemic” presents a wide range of insights that support the Global Fund to End Modern Slavery (GFEMS) in adapting future programming to new COVID-19 realities on the ground. To this end, the study was developed to address descriptive and normative questions about the COVID-19 pandemic’s short and long-term impacts on Bangladesh and India’s RMG industries. These questions included,

1. What are the impacts of the COVID-19 pandemic on RMG supply-chains and factory-level business?
2. How have RMG workers been affected by the COVID-19 pandemic? and
3. How do the COVID-19-related impacts on business and on workers affect vulnerability and possible forced labor?

This mixed-methods study was conducted in two phases. In the first phase, the authors conducted a desk review of recently published media articles, reports, white papers, and other online content to help address the research questions as well as inform the approach to primary qualitative data collection. Primary data collection was conducted in the second phase, including key informant interviews with sector stakeholders, such as government officials, non-governmental organizations (NGOs), and employers’ representatives and workers’ representatives in the formal and informal sectors. Overall findings and recommendations from the rapid assessment are summarized below.

Data Collection

To conduct this study, the authors conducted a rapid systematic review of grey literature tied to our research questions. The authors relied on credible newspaper articles, media reports, government and international organization COVID-19 response statements and policy briefs, white papers, and blogs from research institutions and reputed policy experts. In parallel to this evidence-gathering effort, the authors also gathered documents reflecting the larger context in both Bangladesh and India as it relates to the overall developments and issues in the RMG sector. These documents included country-specific forced labor assessments, legal briefs on specific force labor related laws, country profiles, and migrant worker statistics and databases.

Over the course of data collection, the authors conducted a total of 19 virtual key informant interviews (KIIs), of which 16 were individual KIIs and 3 were group KIIs. Conducted via Zoom, KIIs were approximately 60 minutes in length. The semi-structured interview guide was customized for different stakeholder groups, but broadly covered topics related to supply

chain impacts related to the COVID-19 pandemic, buyer practices, formal and informal sector conditions, experiences of vulnerable workers, and implications and recommendations.

Data Analysis

The authors gathered indexed documents and news reports from March 1 to July 20, 2020. The authors used a deductive thematic approach to develop a codebook, which was iteratively refined as new themes emerged during the document review process and imported into Dedoose (version 8.3.35), a qualitative analysis software. Overall 137 sources were reviewed using the final codebook, resulting in 1,043 code applications and 746 media excerpts. Some key themes identified during the analysis include the significant effects that rippled throughout the supply chain including buyer cancelation and non-payment of orders, non-payment of workers or closure of factories, government and private sector response (or lack thereof), and recommendations for how factories, governments, and buyers should proceed. Data gathered from interviews were captured by the authors in interview notes, coded using Dedoose, and analyzed using an inductive approach. The desk review codebook was updated and used to code the KIIs. A total of 19 KII notes were included in the coding process, resulting in 706 code applications and 343 excerpts. Emergent themes are detailed in the report and supported with relevant quotes.

Key Findings: Bangladesh

COVID-19 Pandemic Impacts on Formal Sector

The effects of COVID-19 in Bangladesh have rippled throughout the RMG supply chain. As clothing stores in the US and Europe have shut their doors and revenue falls, companies are looking to cut costs (Lalon, 2020). As a result, since the onset of the pandemic in March 2020, over 90% of factories in Bangladesh reported buyers canceling contracts and putting holds on ongoing work orders (The Daily Star, June 4 2020; Anner, 2020). A survey conducted by the Center for Global Workers Rights (CGWR) in March showed that 23.4% of suppliers indicated that “a lot” of in-process orders had been canceled, 22.3% had “most” of their in-process orders canceled, and 5.9% had all of their in-process orders canceled. As of April 2020, 1.5 billion dollars of revenue had been lost – by June, this number rose to 3.15 billion USD (Lalon, 2020; The Daily Star, June 4; Kelly & Ahmed, 2020, Quartz, 2020). As of July 20th 2020, according to the Bangladesh Garments Manufacturers and Exporters Association (BGMEA) 3.18 billion USD has been lost and 2.28 million workers have experienced some negative effects, such as lost wages (BGMEA, 2020). Mostafiz Uddin, managing director of Denim Expert in Chittagong and founder of the Sustainable Apparel Forum, stated,

Orders are being cancelled by buyers and retailers at a rate we've never seen before... It is crippling the entire industry. If the buyers do not pay the manufacturers, how will the manufacturers pay the salaries to their workers? Without orders, factories cannot remain operational and will go bust (Mastafiz Uddin, quoted in Sutherl, 2020).

Workers in the formal sector experienced a number of challenges, such as factory closures and termination. One KII respondent notes that 130 Bangladesh Knitwear Manufacturers and Exporters Association (BKMEA) member factories and 398 BGMEA member factories closed their operations temporarily. These estimates primarily include small- and medium-sized factories that were not as prepared to absorb the financial loss as larger ones.

Though buyers have contracts with suppliers that require them to pay for orders, many buyers have asked to delay payments by up to 6 months (The Daily Star, June 22, 2020) while others have managed to cancel orders altogether or avoid payment for orders by invoking a little known “force majeure” clause in contracts (Hafiz, 2020). This clause is usually used in case of natural disasters or war as a justification for not paying suppliers, even if those suppliers have already paid for fabric and workers' labor (AP News, March 27). However, as the pandemic erupted a number of buyers investigated if their “force majeure” clauses also covered disease or “acts of god” that might allow them to sidestep their normal legal obligations (Quartz, 2020). Furthermore, when buyers did cancel orders, CGWR shows that 72.1% of buyers refused to pay for the raw material inputs, like fabrics, which suppliers had already purchased and paid for and 91.3% of buyers refused to pay for the cut-make-trim (CMT) costs already incurred to complete the orders (Anner, 2020). The government-mandated lockdown period, explained in more detail below, further halted business and possible income for suppliers.

Many buyers initially turned a blind eye to the human effects of the COVID-19 pandemic amidst their attempts to save money. In March, the Center for Global Workers Rights cites that 98.1% of suppliers surveyed said buyers did not help cover the cost of paying workers who were furloughed due to in-process order cancellations. Similarly, 97.3% of suppliers said that buyers also did not assist with severance costs for workers who were dismissed due to lack of orders. Given this, as of CGWR's March survey, 72.4% of factories said they could not provide workers with some income while furloughed, and over 80% said they could not provide severance pay when workers were dismissed (Anner, 2020).

COVID-19 Pandemic Impacts on Informal Sector

Though many studies, including those cited above, have been completed on the effects of the COVID-19 pandemic on the export-oriented RMG sector, comparatively less information is currently available about further trickle-down effects on the informal sector. However, several sources point to the precarious nature of informal work, including among smaller, unregulated

sub-contractors. Informal factories have even less reserves than formal factories, and do not receive government support that could have helped them pay workers during and after lockdown.

There are two types of informal factories in Bangladesh, both of which faced closures, declining orders, and difficulty paying workers as a result of the COVID-19 pandemic. The first type of informal factory produces for local markets, and the second type produces work under the table for formal sector factories that are suppliers to global brands. These informal factories typically act as back up when formal factories are past capacity. As part of the supply chain effect and the global impact of the pandemic in overseas garment markets like the US and Europe, the informal factories supplying formal factories began closing their businesses in March 2020 and remained closed until mid-May 2020. A leading national newspaper in Bangladesh noted that as of September 2020 more than 300 factories had permanently closed, representing a loss of \$1 billion USD, while an estimated 50,000 workers had lost their jobs, most from subcontract factories. (The Daily Star, September 13, 2020).

The informal sector faced additional challenges resolving outstanding salary and severance pay during this period. Due to their informality, informal sector factories were ineligible for stimulus packages and bank loans as they are not exporting the product directly, not members of the BGMEA or BKMEA, and do not have an established relationship with banks. Thus, informal sector factories face significant pressures with little relief.

We cannot sleep at night from the 1st to the 10th of each month, when payment for workers' salary appears before us. – Informal Sector Employer

Informal sector factories in Bangladesh began reopening in late May and early June of 2020; however, they continue to face special challenges and uncertainty. Operators of informal factories tend to be former workers themselves with little capital reserves. Therefore, informal sector factories' capacity to absorb shock is quite limited. Furthermore, one respondent estimated that about 30-40% of all informal sector factories run their businesses based on the availability of day-to-day work orders. So, even as they reopen, some informal sector may have to shutter quickly if steady work does not continue.

Effects on Employment

Workers are feeling the brunt of the failure of global apparel supply chains during the pandemic due to factories stopping production, lack of payment for hours worked, the government shutdown period, forced furlough, and improper termination processes. Estimates range dramatically, but between one and four million Bangladeshi garment sector workers have had their employment directly affected by the COVID-19 pandemic (Anner, 2020; Sultan et. al, 2020; Quartz, 2020), and up to 10 million people including workers themselves and their families, are affected by canceled contracts, unpaid orders, and factory closures (Hafiz, 2020).

While some estimates of employment termination are based on official factory data usually provided by BGMEA and BKMEA, other information is provided by workers unions and NGOs, based on their perception and personal knowledge of the situation. BGMEA data indicates closure of 113 factories and the loss of 51,529 workers due to retrenchment since the pandemic. However, most KII respondents indicate that actual numbers far exceed official reports. In many cases, respondents such as formal employers understated the magnitude of workers who lost jobs, likely because the RMG factories tend to be under public scrutiny. In addition, it is likely that the number of RMG sector workers who lost jobs is underestimated as workers who are employed in unregulated or informal factories are not counted in formal estimates.

Trade Union representatives further emphasize that many factories are terminating workers without providing compensation or providing service benefits; some factories forced workers to sign blank papers and return their ID cards to further evade their severance responsibilities (Sultan et al., 2020). Furthermore, another 18,000 workers – or more – have not been paid for their hours that they already worked (The Daily Star, June 4; Sultan et. al, 2020, RMG Bangladesh, 2020). KIIs with key stakeholders confirm that most workers are being terminated without following proper protocol. In most cases workers are forced to sign their resignation letters, fired without advance notice, and denied severance pay.

Workers who have retained their jobs are also facing an adverse situation due to a lack of timely wage payments or salary cuts. These workers are also in a vulnerable situation as they are working regular or over-time hours but are not paid wages.

After Eid, we saw seven factories in Narayanganj recruited workers without giving preference to workers who served previously. This factory offers 8,600 BDT [101 USD] now from 9,000 BDT, [106 USD] the amount paid previously. – NGO Representative

Although the government introduced a stimulus package specifically for RMG factories to carry on operations, including paying workers, it appears the benefits are not reaching those who need them most. Several KII respondents highlighted that big factories (which comprise less than 10% of total RMG factories) were more likely to receive stimulus package benefits, therefore being able to pay worker wages. On the other hand, small, medium and informal factories (90% of total RMG factories) did not receive benefits and, as a result, it is likely the majority of their RMG workers were not paid outstanding or complete wages after the onset of the pandemic and government lockdown. The fact that many workers have been let go without following proper protocol, or called to work but not paid for that work, indicates that the full scale of the problem is likely hidden.

As a result of these layoffs, wage cuts, and lack of payment, Center for Policy and Dialogue found that 63% of respondent workers could not pay house rent, 39% had unpaid utility bills, and 36% had unpaid school fees (RMG Bangladesh, 2020). In addition to income loss,

workers have to battle rising prices and limited availability of essential commodities, putting them and their families in an even more vulnerable situation.

Workers' salary had curtailed on the one hand, and essential commodity price went on high; house rent remained the same, and additional cost for soap, hand sanitizer, and other cost added into the regular costing on the other. Workers faced double challenges in income loss on the one hand and substantial financial pressure from the cost of living during the pandemic period. – Formal Workers' Representative

While the majority of workers are unable to negotiate with employers for their outstanding wages or fight against “illegal” termination, those who seek union support are more likely to receive relief from employers or get paid what they are due. Research shows that trade unions and local NGOs have taken a leadership role in negotiating with factory owners, employers' associations, and the government to help promote payment of wages and job security for workers, as well as working with the Directorate of Factories and Establishment (DIFE) to collect information on closed factories, layoffs and retrenchments, and unpaid wages (Sultan et al., 2020).

Return to Work

At the onset of the pandemic, RMG factories and workers were first affected by the government shutdown and required a factory closure period from March 26 to April 4, 2020. Many garment workers left cities to return to their home villages with the plan of returning by the factory reopening date. However, without prior notice, on April 4th the government shutdown was extended to April 12th. Due to the severe lack of coordination between stakeholders, and despite limited modes of transportation, hundreds of garment workers walked more than 100 km to Dhaka to get back before April 5th. Upon returning to Dhaka, they saw that factories were still closed. Factories remained shut until April 26th, with factory owners providing limited to no information to workers about when they could resume work. Further complicating matters, many landlords in Dhaka denied workers access to their homes fearing the spread of COVID-19.

Eventually, when factories did reopen, those workers who were not terminated returned to work at factories with an increased risk of being exposed to COVID-19 due to the lack of protective safety measures. While trade unions, ILO, BGMEA, and BKMEA are making efforts to provide information and safety training in formal factory establishments, workers believe these measures do not translate into appropriate precautions or social distancing in factories. Factory owners do not always choose to enforce regulations on the use of gloves and masks, and some facilities do not provide wash stations or hand sanitizers for workers. Overall, social distancing is not observed and workers continue to live and work in close quarters (Sultan et. al, 2020). One KII respondent noted that the weak enforcement mechanism by DIFE led to workers

being very prone to getting infected with COVID-19—once factories reopened, more than 150 garment workers contracted the virus in a very short span of time.

Some factories follow some provisions of health guidelines instructed by the government—for example, temperature checks, masks, and hand sanitizers available in some workplaces. However, nowhere in any parts of the industrial hub testing facilities, home quarantine, and isolation facilities exist inside the factories. Social distancing is impossible inside the factories; they have witnessed no single factory reorganizing their work to maintain social distancing requirements. For workers, neither the workplace nor at home, they were able to maintain social distancing. – NGO Representative

Workers are returning to work in the face of COVID-19 related dangers to protect their income and continue providing for their families. However, employers are exploiting workers' financial vulnerabilities to make them work longer hours for less pay or paying them less for the same amount of work. Therefore, though some workers are retaining their jobs, they are working longer hours and are being exploited by their employers. The combination of financial insecurity, excessive work and limited pay is also compromising worker health and mental well-being.

Now, the worker comes back to work, work-intensity has increased. That has further gone up while there is a shipment deadline. The management sets production targets too high for the workers they cannot meet even after putting their best effort. That has a severe negative impact on workers mental health. – Government Representative

Vulnerable Groups in the Garment Supply Chain

Among RMG workers severely impacted by the pandemic, certain sub-populations have been disproportionately affected. These include women workers, workers employed in the informal sector, and migrant workers. Women make up nearly 90% of RMG workers in Bangladesh and are therefore most directly affected by any event that impacts the sector. One trade unionist cites women may also be less likely to push back or speak out against problematic practices in factories given both their vulnerability and social status (The Guardian, July 9, 2020). According to the Bangladesh Labor Foundation, 40% of all informal workers are now unemployed and are facing immense financial insecurity, having taken on additional debt at a time with no steady income. Informal workers stranded in industrial belts and unable to return home are borrowing money from relatives and not through formal sources of credit (Workers' Representative Informal). Migrant workers constitute another group of RMG workers facing significant challenges during the pandemic. Having to leave major cities and quickly return to their homes in rural and remote areas at short notice, migrant workers took informal and dangerous transport home – like walking or informal trucks or cargo vans, since formal public transport had been shut down (Clean Clothes, April 4, 2020).

Increased Risk of Forced Labor

The power imbalance in the global garment supply chain between buyers and suppliers, severity and uncertainty of the COVID-19 situation, financial insecurity, and desperation of workers are key contributing factors putting workers at an increased risk of being trapped in forced labor situations.

The lack of support for the most vulnerable creates a potential for increased forced labor among RMG sector workers. Current wage cuts and lack of payment for hours worked are already putting workers in a precarious situation. While it is possible that some of these changes in wage payments will be remedied in the short term, it is also possible that such irregularities will continue – potentially spiraling workers into an even more destitute situation (RMG Bangladesh, 2020). The majority of KII respondents highlighted that instances of “illegal” termination, non-payment of wages, and labor rights violations (including excessive and forced overtime work), continue to increase during the pandemic, resulting in worker exploitation and forced labor.

After returning to work at the end of the government mandated COVID-19 shutdown, workers are facing increasingly stressful conditions on factory premises. In fear of being fired and losing their only source of income, workers are enduring harsh treatment and demanding employer expectations. KII respondents reported instances of workers not getting any leave, being harshly reprimanded for being late or absent, and not being allowed to go to the washroom or drink water while at work. In addition, employers are setting unrealistic production targets for workers to meet the same level of buyer demand. Consequently, RMG workers are working longer hours, accepting lower wages, and tolerating harassment and compromised occupational safety, in exchange for employment.

All the factors put pressure on the work intensity; the owner forced workers to do more work within limited hours of work. Thus, the owner adopted a policy like 'with less workers, get done the more'. Unfortunately, workers are not getting more wages for more work. Workers do not speak because of the fear of losing their jobs. – Government Representative

Workers likely feel a greater burden because they believe they are easily replaceable in garment factories. Due to the large number of laid off workers, the current supply of garment workers exceeds the demand. Mounting evidence suggests that employers can potentially exploit this equilibrium gap and force workers to take on more work than they are paid for or accept lower wages. Underscoring the severity of the issue, one NGO leader and former child garment worker said, “Our workers are not scared about the disease, but they are scared about starving with their family and children...Our workers are vulnerable but nobody is taking responsibility. We need responsible business because that’s not fair.” (quote from NGO leader Atker, in Hafiz, 2020).

Given the stressful working environment, some workers may be forced to make difficult decisions about whether to continue working at a factory in the hopes of eventual back payments and/or return to their full salary, versus attempting to leave and find work elsewhere. Unfortunately, most RMG workers have few options in other formal sector jobs. Therefore, it is likely that workers who are unable to get their RMG sector jobs back or decide to leave their current positions will move toward the informal sector, despite lower wages and lack of social protection. (Fashion Revolution, 2020).

The most important trend is a growing informalization of work. Among all other [alternate] occupations, agriculture is the main occupation most people engage themselves in. – NGO Representative

In addition, workers may be drawn to illegal or illicit income earning opportunities to provide for their families during these uncertain times. The Open Society Foundation cites that many women workers have had to consider other income sources like sex work, in order to provide for their dependents (Open Society Foundation, 2020). This is corroborated by KII findings indicating that workers, especially those who are stuck in Dhaka, are now seeking alternative income opportunities, such as selling fruits and vegetables and rickshaw pulling. Worker Akhi Akther, quoted in an article in *The Guardian*, highlights the exact risk of forced labor, saying: “We can’t go back to our village because we don’t have anything there, what will we do? Our jobs are our only source of earnings. Orders have shrunk, factories are getting rid of workers left and right. I am emotionally and mentally devastated.” (Kelly & Ahmed, 2020). Due to exhaustion and in an attempt to simply sustain themselves, there is a risk that many vulnerable workers – including those that previously had formalized employment in registered factories – could be coerced into forced labor including involuntary work, forced overtime, or trafficking.

Key Findings: India

COVID-19 Pandemic Impacts on the Formal Sector

The formal RMG export sector in India is severely impacted by the coronavirus pandemic, particularly in the producing and exporting hubs of Tirupur and the Delhi NCR region. Prior to the pandemic, the apparel industry accounted for over 2% of India’s GDP and employed an estimated 45 million workers (KPMG, May 2020). At the time, this industry was growing rapidly but unsustainably, with large brands transferring production risks to suppliers throughout Asia. The combination of unrealistic production targets, depreciation of local currencies relative to the dollar, and increased costs of importing raw materials compelled suppliers in the region to reduce their pricing to stay competitive (Asia Floor Wage, July, 2020). Exporters were hence forced by to lower wages to stay competitive.

As a result of the pandemic, companies suffered substantial revenue losses due to the cancellation of orders by buyers, amounting to nearly U.S. \$4 billion (Reuters, April 20, 2020). According to a study by the Apparel Export Promotion Corporation (AEPC) in May 2020, 72% of exporters stated that buyers had not paid for materials that they had already purchased, and this had repercussions on the company and the employees. One formal sector employer noted, “Unlike hospitality and other sectors that were also drastically impacted, garment factories had products and materials that they could not do anything with. It was just lying in the factories. Buyers cancelled orders, and payments were deferred for at least 120 days.” These cancellations have dangerous implications for garment workers, as the study also highlighted that 88% of exporters “felt challenged” in paying workers’ wages, in turn rendering the workers highly vulnerable (Society for Labour & Development, June 21, 2020). This is representative of a larger pattern of retailers offloading risks in the global supply chain by cancelling orders, affecting businesses, and, to a greater degree, garment workers.

Following the government lockdown in March, work began resuming in May in some of the large, formal factories in the Delhi-NCR region. One employer of a formal export factory noted that even though operations began and the factory had resumed to almost 100% of its previous orders, “a month of production was lost. This erased any scope of profit for this year, and has made this year only about survival.” Another representative of the formal sector attributed the slow recovery of the sector to its long production cycle. “The apparel supply chain functions on a cycle of 90-120 days. So even to re-start production, it took a month for this sector [to recover].”

COVID-19 Pandemic Impacts on the Informal Sector

In addition to effects on the formal sector, the COVID-19 pandemic and resulting lockdown in India have sharply affected the informal garment sector. The Clothing Manufacturers Association of India (CMAI) notes that 80% of the Indian garment industry is comprised of micro, small, and medium enterprises (MSME) that do not have the reserves to survive the lockdown (The Economic Times, April 14, 2020). A large portion of these businesses are home-based and informal, producing goods for the local (Indian and South Asian) markets as well as for export markets (Kara, January 31, 2019). Prior to the pandemic, MSMEs that chiefly operated on liquidity were facing risks due to schemes such as demonetization by the Indian government.

Importantly, the decrease in demand and cancellation of orders due to the COVID-19 pandemic adversely affects workers in the informal sector, who are primarily women and/or migrants and already considered high risk (Asia Floor Wage, July, 2020). Government bailouts for the textile industry are also not applicable to all MSMEs, as not every business is registered or meets the necessary requirements in terms of the number of workers or size. A large number of MSMEs face the risk of permanent closure in the coming months, unless preventative measures are implemented by the government (Times of India, April 14, 2020). Unlike larger

exporters in the formal sector, it is also nearly impossible for MSMEs to reopen, as they are not in the designated industrial areas that have state-authorized permission to remain open (Times of India, May 12, 2020). In interviews, respondents described how many informal factories have been closed down. According to one NGO representative, not more than 20% of the informal factories and production units had resumed production.

It is unclear to what extent informality will remain an integral part of the RMG sector in Delhi/NCR. One NGO respondent noted that before the pandemic, formal export sector factories preferred to have no more than a quarter of their workforce on steady payrolls. The rest of the work was subcontracted to a range of contract workers, informal units, and home-based workers. This was estimated by some respondents as likely to increase, especially in the wake of new compliance demands on formal factories for sanitation and distancing norms, allowing the informal sector to operate more agilely and with increased capacity due to a lack of regulation and oversight, and thus heralding the need for incentives for the formal sector to adhere to the new compliance demands.

Employment Status and Wage Payments

In the immediate aftermath of the lockdown, most workers lost work and associated wages. According to the Clothing Manufacturers Association of India (CMAI), the majority of its member firms were able to pay wages in March, but have not been able to ensure continued payment in the subsequent months. Additional reports suggest that many factory owners, traders, and shopkeepers have withheld or reduced wages since the onset of the pandemic. Similar to the analysis from Bangladesh, the discrepancy in reported wage payments can be attributed to the variation in month of publication, source of information, employers' cash flow, as well as government regulations. While some employers provided meals, accommodation, and advance payments during the lockdown, others have left their workers in destitution. Similarly, although government directives mandate employers to pay full wages during factory closures, this was not properly enforced and was only applicable for regular workers, excluding short-term contract or piece-rate workers who form a sizable majority of the textile workforce (Asia Floor Wage (AFW), May; Business of Fashion, April 30; Asia Floor Wage, April, 2020). Some terminated workers were asked to collect final wages in person, which was not always possible or advisable for workers due to mobility restrictions during the lockdown (AFWA).

Workers' unique experiences during the pandemic varies by geographic location. For example, New Delhi's Gandhi Nagar area is Asia's largest wholesale hosiery market, boasting approximately 15000 shops and 250,000 skilled workers within a purely indigenous supply chain. Reports suggest that the economic crisis in this garment hub began an entire month before the lockdown when riots broke out in Jafrabad, just 2.5 miles away from Gandhi Nagar. Riots were concentrated in areas where suppliers of Gandhi Nagar's garment stores lived, forcing skilled workers to flee from riot-affected neighborhoods. Importantly, a large proportion of garment industry workers are Muslims who were particularly targeted during the communal

violence (Business of Fashion, April 30, 2020). Another example is the state of Karnataka, Bengaluru, the ‘Garment Capital of India’, which is witnessing mass closure of garment units in the face of the pandemic. Findings from a survey jointly conducted by Alternative Law Forum and Garments Mahila Karmikara Munnade indicate that the majority of workers received no wages in April and only a few received half their wages in May. Elsewhere, a survey conducted by SLD of garment workers in Delhi NCR and Tirupur in Tamil Nadu found that only 1 out of 44 contractual workers received some payment from the employer; 15 of the 44 received subsidized food grains from the government. Several media reports indicate that contractual workers were abandoned by their contractors and factory owners, leaving many without wages for over 3 months (Business of Fashion, April 30, 2020).

Even as some factories reopened, workers continued to face widespread unemployment and wage insecurity. During the medium term, most informal units and home-based workers started to make personal protective equipment (PPE) such as masks. However, one informal workers’ representative noted that for this work, workers earned 50% of their previous wages. Another NGO highlighted that in July and August many workers were asked by employers in Delhi NCR to return to work in order to complete pending orders. “However just after 15 -20 days of work they were left without work again. Now many of these workers are thinking of returning back to the villages.” An informal sector worker interviewed in September who had resumed work noted “20-30 workers come asking for work at our factory every day. I have never seen such pervasive unemployment.”

The long-term future of garment workers continues to be steeped in uncertainty. Respondents feel that workers are not only faced with unemployment but also with indebtedness and homelessness. For example, it was reported that, in order to survive the preceding months of lockdown and lack of work, workers in Tiruppur borrowed from a number of sources, including contractors and grocery stores in the neighborhood. “Workers don’t have money to come back to the city. As a result, they might take money from a local lender or dominant caste person, and go back into the loop of indebtedness” said another NGO stakeholder. Furthermore, for workers who are based in the city or chose not to return to their home districts, continued rental payments have also created debt burdens. An informal employer noted that in towns like Kapas Hera in NCR, landlords did not waive rental payments despite government recommendations. As such, instability in employment is creating new risks of homelessness.

Unique Experiences of Vulnerable Groups in the Garment Supply Chain

Pandemic-induced lockdowns and factory closures have disproportionately impacted the most vulnerable groups of garment workers – daily wage earners, migrant workers, piece-rate workers, home-based workers, and women – who neither have a financial buffer nor adequate social protection to survive the crisis. India’s apparel industry thrives on migrant and women workers. Yet, despite their pivotal role in keeping the industry alive and profitable, migrant and

women workers constitute vulnerable sub-populations among garment workers rarely protected by social security schemes. These experiences are described in further detail below.

Return to Work

As garment factories and businesses began reopening in June, migrant labor shortage forced employers to review their labor policies and lure workers back with incentives of free transportation, accommodation, and food (Times of India, April 12; Economic Times, June 7; Hindustan Times, June 7, 2020). Migrant workers reached home hungry and destitute after the government failed to provide due protection. Workers are unwilling to return to faraway garment clusters after the mistreatment and trauma; as such, they are seeking alternative employment opportunities in their state of origin despite the risk of reduced income (Society for Labour & Development, June 21, 2020). Some are staying back to care for their families who have also been affected by the pandemic. The latter may be especially true for women who often bear a disproportionate share of domestic and caregiving responsibilities (ILO, June, 2020).

While some workers were reluctant to return, others once again began migrating to urban cities due to lack of employment opportunities and significantly lower wages in their home state. Given that Delhi shares borders with multiple states, workers often travel across state borders to work. During the lockdowns, there was no clarity on the border closures. These borders were opened intermittently and then shut down again with little notice to those traveling and incurring additional travel related costs. In the case of workers living in Udyog Vihar/Kapas Hera, they were restricted in their ability to cross the Delhi border to work.

In an attempt to resume full capacity operations while ensuring minimal labor and social distancing measures, ten state governments passed orders that sanction an increase in working hours from 8 to 12 hours per day. Contrary to global norms mandating a 48 hour work-week, manufacturing units in select states are now enforcing 72 hour work-weeks. Responding to this directive, Rahul Menon, Assistant Professor at Tata Institute of Social Sciences, argues that while longer working hours can increase labor productivity and output growth, the new sanction disproportionately shifts the burden onto workers without a proportionate increase in wages. While some states like Rajasthan have mandated substantially higher overtime wages for increased work hours, states like Gujarat have yet to do so (The Wire, May 6, 2020).

For those workers who were able to resume work, respondents interviewed for this study were unaware of the standard of hygiene and safety that was made accessible to workers. One stakeholder observed that the safety of workers in their 'return to work' depended on whether there was an NGO or civil society organization in the neighborhood who could oversee compliance. For women workers, in addition to COVID-related sanitation measures, menstrual hygiene was also reported to have been severely impacted due to the pandemic, including restricted access to products and a lack of sanitary facilities. An informal worker said that, while there was access to masks and sanitizers in the factory, in the event that they fell ill, there was

not a single doctor in the neighborhood in NCR where they worked. The workers were forced to go to one of the large hospitals in Delhi to get treatment.

Different kinds of awareness raising and educational work on washing hands, etc., are needed. There is also a need to be supported materially – say through the provision of affordable soap. Access to healthcare, in the form of logistical support to get to hospitals, and access to national health insurance scheme, are also requirements. – NGO Representative

Although most formal factories resumed operations in May, most informal units remained closed. Many workers returned to their home districts. One stakeholder noted that many workers who returned home did work provided by the state under the Mahatma Gandhi National Rural Employment Guarantee Act and then transitioned into agricultural work. “The usual trend is that industrial work is reduced during June and July, as it is peak agricultural work. It is only after August that we would see the real change as most of the sowing work is now completed, and workers usually return to cities around this time.”

Increased Risk of Forced Labor

RMG workers of all types reported experiences of abject hardship due to extended unemployment and underemployment as a result of the COVID-19 pandemic (The New Indian Express, June 9, 2020; 223, 118, IJM, 2020, The Indian Express, April 20, 2020). As described above, workers across RMG sectors and regions reported reduced wages; irregular, inconsistent, and/or extended work schedules; and delays in payment. All of these factors demonstrate increased risk of forced labor.

Widespread unemployment is pushing workers to do any kind of work that is available to them. Two NGO representatives noted that, because of garment work being a low-skill trade, workers may be likely to change occupations. Except those who have reached the highly skilled rank of being a ‘master’ or skilled tailor for example, which is limited to 5% of the workforce, the others may take up small-scale construction work or street vending, even accepting to work for daily wages. This leaves workers in a precarious situation, balancing unfair labor situations with the need to survive in the face of unemployment. The large number of unemployed RMG workers, most looking for new and/or additional work, compounds the issues around unfair labor practices. Employers know that low wage workers have little recourse in choosing work and also have a deep labor pool to choose from if confronted with workers who are unwilling to accept unfair practices.

Most respondents felt the formal sector is increasingly depending on the informal sector to stay viable, passing down both the risks of an uncertain market as well as new compliance costs related to the COVID-19 pandemic. An informal sector employer who had to close down operations because of the pandemic noted that “Big companies do not want to take the risk/

pressure of safety norms. So, they will even pay 2 INR/ piece more to get the work done informally.” This trend was traced by the trade union representative to the brands and their unwillingness to take responsibility for the entire supply chain.

They have sent memos on hygiene and sanitation standards. But the problem is that brands don't pay for compliance costs even when they make these demands. They outsource these costs to supplier factories. As a result of this, suppliers lower workers' wages and increase their hours of work. – Formal Workers' Representative

The vulnerable groups mentioned above are similar to the three subgroups of workers that appear to be at especially high risk of increased forced labor—women and girls; migrant workers; and workers in rural settings. Several articles contained interviews that highlighted the COVID-19 pandemic's disparate impact on women and girls who bear disproportionate responsibility for child and family care responsibilities (The New Indian Express, June 24; IJM, Reuters, April 20; Ibid., March 30; Clean Clothes Campaign, July; The New Indian Express, July 5; WIEGO, 2020). As one article reported, “The vast majority of India's garment workers are women, who generally take responsibility for childcare...managements have targeted working mothers and left many with no choice but to quit” (Reuters, June 30, 2020). A report from IJM explained, “In many cases during COVID-19, garment workers have been trapped at factories and worksites...22 girls and young women from the state of Odisha who were trapped in a garment factory near the city. These young women were being forced to toil for long hours and deprived of their wages” (IJM, 2020).

Migrant workers are also at higher risk of forced labor (Reuters, March 30, Business Standard India, May 4; Clean Clothes Campaign, April & July; AFW, April; Economic Times, June 17, 2020), particularly given the already high risk of restrictions on movement that migrant workers living in dorms faced even before the pandemic. Those who stayed in workers' hostels during lockdown or returned thereafter reported unsanitary living conditions and overcrowding (Reuters, March 30; News Trust, April 22, 2020). Many migrant workers preferred to return home during the lockdown period. But, both leading up to and following the March lockdown, the federal government placed restrictions on inter-state travel to curb the spread of COVID-19. These restrictions had a disparate impact on migrant workers, who were forced to decide between the risks of returning to their home and families or staying on site in workers' hostels. A young worker from Odisha trapped in a garment factory said, “We are only waiting to go home and stay with our family. We are not interested in work. The company owner keeps us to meet his target. The rising number of COVID-19 cases creates anxiety and fear within us. If anything happens and we die, our bodies will be left unnoticed” (IJM, 2020). Many migrant workers who did leave and crossed borders for work during this period reported being brutalized by police (The Hindu, May 21; AFW, April; Business of Fashion, 2020).

Lastly, workers in rural settings—many of whom are women and girls and migrants—also appear to be at high risk of increased forced labor. Factories in rural settings were among the

earliest allowed by the government to reopen after the lockdown (Reuters, April 20; Economic Times, May 11, 2020). Due to their physical isolation, their conditions are less likely than those in urban areas to be monitored by government actors and/or international corporations.”

Discussion

Our research finds that garment workers in both Bangladesh and India are vulnerable to forced labor due to high rates of poverty, the fragmented and informal nature of textile supply chains, and weak enforcement of legal protections for workers. Though the apparel sector has long come under criticism for poor working conditions, sexual harassment, forced labor, and workplace health and safety issues, the COVID-19 pandemic further exposed major, existing flaws in the global garment supply chain. Many global brands (“buyers”) responded to the pandemic by cancelling orders, halting production, and refusing to pay factories (“suppliers”) in developing countries. Refusal to pay left suppliers—many of which already operate on razor-thin margins—in debt and with excess inventory. As a result, many suppliers could not or did not pay workers, leaving already impoverished workers in an incredibly vulnerable position. Though these trends developed differently in Bangladesh and India, in both cases it led to a heightened risk of workers being subject to forced labor conditions.

The first key finding from this study is that the COVID-19 pandemic is exposing and exacerbating the extant power imbalance between buyers and suppliers in both countries. By reinforcing the asymmetric power dynamics between buyers and suppliers in the global supply chain, the pandemic is putting suppliers in increasingly vulnerable positions and eroding trust between business partners.

The second key finding is that with increasing amounts of debt, no source of income, and uncertainty about their future employment and income prospects, RMG workers are in an extremely vulnerable situation. RMG workers, particularly women, migrants, and informal sector workers are especially vulnerable to global impacts to the supply chain. Most RMG workers lost wages as a result of closures and lockdowns associated with the pandemic and those already living at-risk were disproportionately impacted by these losses.

Thirdly, the COVID-19 pandemic has led to an increase in the risk of forced labor. The pandemic has increased the financial insecurity and desperation of workers, as there are fewer RMG sector jobs than before the pandemic and workers have less leverage. Those apparel workers returning to work face increased pressure to accept poor working conditions, including being subject to forced labor through both involuntariness and work under the menace of penalty, due to the generally uncertain outlook for factory employment and the large number of unemployed workers who could replace them.

Although there are major commonalities in how the pandemic impacted the RMG sector in Bangladesh and India, there are also important distinctions and nuances between the two countries. These nuances are described below as part of our country-specific recommendations.

Conclusion

RMG sector stakeholders, including private sector supply chain actors, policy actors, and GFEMS implementing partners, can use this research to adapt programs and address the multi-faceted challenges of apparel workers. Based on this report's findings, the authors put forth a total of 12 recommendations, including 4 general recommendations for both Bangladesh and India and 8 country-specific recommendations. As detailed in the report (Hansen et al. 2020), recommendations cover activities ranging from the short- to long-terms and involving varying levels of collaboration among RMG sector stakeholders.

General recommendations for Bangladesh and India RMG industries include the following:

- Expanding COVID-19-related occupational safety and health (OSH) training, including awareness campaigns and guidelines for maintaining a safe workplace;
- Increasing overall health awareness and primary health care support through mobile clinics or temporary health centers (provided through collaborative efforts of buyers, suppliers, government actors, and NGOs);
- Strengthening government programming in the RMG sector, including an increase in oversight of informal factories; and
- Establishing worker-focused policies and operations in the private sector that protect against the negative impacts on workers in the case of future crises.

With regard to the RMG sector in Bangladesh, the authors recommend advancing livelihoods programming for vulnerable workers as they may need additional training to enhance their ability to find alternate employment outside formal and informal factories. Other recommendations include broadening social protection programs for all RMG workers, including unemployment benefits and housing, to mitigate the long-term impacts of housing and food insecurity in times of crisis. The authors also recommend rebuilding trust between buyers, employers, and workers through programs that promote a culture of responsible leadership.

In India, the authors recommend the mediation of unpaid wages for workers through government mandate and advocating for the passage of long-term social protection and labor regulation legislation, such as the One Nation, One Ration card initiatives. Other recommendations include promoting workers' collectives as key vehicles for organizing, training, and information-sharing as well as supporting initiatives for home-based workers and children that connect workers to their entitlements and reduce student drop-out rates. Lastly, the authors identified a need for providing technology and data security support for implementing partner organizations whose work is now virtual due to physical distancing guidelines.

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