

Identification the Factors of Safety and SWOT Analysis of Ready Made Garment Industry in Bangladesh

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Abstract: The Ready Made Garment industry is the lifeblood of the economy of Bangladesh. The industry is at risk in terms of safety and sustainability. Fire accidents are common in garments. Bangladesh earned enormous bad reputation after two worst industrial disasters Rana Plaza Collapse followed by Tazreen Fashion fire killing more than thousands of workers. A practical survey has been done directly on different stakeholders of the industry to realize the current practices and lacks regarding safety and sustainability. From this research, it has been found that building condition, fire safety equipment and fire drill, training on health and safety are satisfactory level at compliance industry but moderate to low and some of the unsatisfactory level at average compliance one. Though safety issues are meeting mostly but, still miles to go achieving sustainability. In addition the SWOT analysis it has been found that biggest strength of Bangladeshi RMG industry is cheap labor, biggest weakness is safety and labor productivity, biggest opportunity is price competitiveness and biggest thread to be found is political stability and price diminishing.

Keywords: Ready Made Garment industry, Bangladesh, industrial disaster, compliance, workplace safety, SWOT, sustainability.

1. INTRODUCTION

The garment industry has emerged as the dominant export earning sector in Bangladesh during the last few decades. The industry has been expanded since late 1970s [1]. The productivity from this sector has become higher than the agriculture. At present about 4.2 million people are directly employed and many others in forward linkage industry, backward linkage industry and indirectly involved with garment industries in Bangladesh [2]. The rapid expansion of the industrial development creates job opportunities as well as promotes reducing poverty. It also promotes growth to other industry like banking, cosmetic industry, communication and transportation [3]. Thus the economic growth of Bangladesh was surprisingly steady and gradually increasing in the last decade. With help of RMG sector from a bottomless basket Bangladesh has become a basket full of opportunity. Even during the world recession period, the crisis affected Bangladesh very little. At present Bangladesh is the second largest garment manufacturer and exporter country in the world. Though having such steady progress garment industry had to face crisis situation and questioned from buyers and international community for sweatshops and violating basic labour rights. Bangladesh

earned enormous bad reputation after two worst industrial disasters Rana Plaza Collapse (2013) followed by Tazreen Fashion fire in 2012 killing more than thousands of workers [4]. And thus the issue of workplace safety and sustainability comes to us as a burning issue. Workplace safety and sustainability is a hotly discussed and challenging issue in the era of globalization. Safety can be termed as the state of being "safe" (from French *sauf*), the state of being protected against physical, social, spiritual, economic, occupational, political, emotional, psychological, educational or further kinds or consequences of failure, destruction, fault, accidents, harm or any other event which could be considered non-desirable [5]. Safety can also be defined to be the control of recognized hazards to achieve an acceptable level of risk. This can take the form of being protected from the event or from exposure to something that causes health or economic losses. It can include protection of people or of possession. Safety is defined as the condition of a "stable state" of an organization or place doing what it is supposed to do. What it is supposed to do means following national codes and standards, linked with architectural and engineering designs, corporate vision and mission statements, and operational plans and personnel policies [6]. For any organization, place, or function, large or small, safety is a normative concept. It complies with situation-specific definitions of what is expected and acceptable. Another word focused in this study is "sustainability". Tension among the aspirations of mankind towards a better life on the one hand and the limitations imposed by nature on the other hand. In the course of time, the concept has been re-

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interpreted as covering three scopes, social aspect, economic aspect and environmental aspect [5].

Sustainability is the top priority concern for many organizations. For global firms Sustainability isn't part of their work only rather it's a guideline that influence all of their work. To pursue sustainability is to create and maintain the conditions under which humans and nature can exist in productive harmony too [7]. In the above background, an attempt has been made in the paper to overview the garment industry in Bangladesh in order to assess its current status and ways of development in terms of safety and sustainability. So the objectives of this research is:

- To identify the current safety conditions in the RMG industry of Bangladesh.
- To identify strength, weakness, opportunity and threat of Bangladeshi RMG industry.

2. LITERATURE REVIEW

The rapid growth of the economy that came along with RMG is also brought enormous social change in terms of reduction of illiteracy rate, diminishing child marriage, women empowerment, reduction in malnutrition, reduction in newborn death, increasing life-expectancy. Girls those were burden to their family earlier has now become hope for families [8]. The country has now become a role model for rapid development [3]. Currently, the textile industry provide 83.49% of national exports. This proportion is even higher in Bangladesh. In Bangladesh, the number of employed workers in the textile industry increased 4.2 million in 2018 and the number of enterprises 4560 [9].

Although the garment industries have become the backbone of the country's economy, it also possesses threats recently. Despite having the outstanding success in the RMG sector, the following broad factors like lack of safe

environment, inadequate Health and hygiene facilities and unsafe working condition; frequent fire incident and building collapse are other serious concerns [10]. There are several fire accidents, which caused death of hundreds of workers. Most of the incidents are caused by fires [11]. In addition, the recent garment building collapse in Savar turned into a hot issue in Bangladesh as well as in the rest of the world due to its thousands of labours death [12]. This incident addresses the question of safety and sustainability of the garments industries in Bangladesh. Many factory owners do not follow the minimum safety regulations of the garments. There is no proper policy or concrete labor union policy in this sector. Many factory owners such limitations as advantage and they become greedy to have more profits without investing sufficiently on safety. Safety is precondition to sustainability of any Industry [13]. Although the garment industries have become the backbone of the country's economy, it also possesses threats recently. Here is still lack of adequate safety measure. There is several fire accident, which caused death of hundreds of workers and fires have become common incidents [14]. In addition, the recent garment building collapse in Savar killing some 1131 turned into a hot issue in Bangladesh as well as in the rest of the world due to its thousands of labors death [4]. This incident addresses the question of safety and sustainability of the garments industries in Bangladesh [13].

Major RMG disaster of Bangladesh

Over 1500 people died in RMG industry related accidents between 2000 and 2014. Most worst of them were Tzaneen Fashion Fire in 2012 followed by Rana Plaza collapse in 2013 [15]. It is observed that those two out of three RMG accidents caused by fire. Though Rana Plza collapse was the last wake up call for us still improvements required [14].

Date	Disaster	Life hazard	Data Source
April 11,2005	Spectrum Garments Collapse	64 Died 80 injured	Clean Cloth [16]
Feb 23 ,2006	KTS Textile Mill fire ,Chittagong	61 died 100 injured	Clean Cloth[16]
February 25, 2006	Phoenix Garments (building collapse)	22 died	Clean Cloth[16]
February 25, 2010	Garib and Garib Sweater Factory fire	21 dead and 50 injured	Clean Cloth[16]
December 3,2010	Eurotex Boiler Explosion	2 died 62 injured	Clean Cloth[16]
December 14,2010	That's It Sportsware Fire	29 people Died	Clean Cloth[16]
November 24,2012	Tazreen Fashion Fire	112 died 120 injured	Clean Cloth[16]
January 26,2013	Smart Export Fire	7 died 8 other injured	Clean Cloth[16]
April 24,2013	Rana Plaza Collapse	more than 1129 killed and more than 2500 injured	Washington Post[17]
May 9,2013	Tung Hai Sweater Fire	8 Died others injured	Clean Cloth[16]
October 8,2013	Aswad Garment Factory Fire	7 people died many others injured	CNN[18]

Table-1: Major accident of RMG Industries in Bangladesh.

Though we had seen some improvements in safety since saver building collapse but the issue came again after Tampco Packaging fire that caused death of another 23 lives [19]. Though Tampco is a foil factory not a RMG, but absence of workplace safety in Bangladesh has come to question again. The recent 'Colour Max BD Ltd' gas lighter factory fire Ashulia killing 7 and 30 others burnt [20].

Bangladesh still needs to upgrade some sustainability factors for long term sustainability and development in this sector. Still workers' productivity , producing high fashioned products, product diversification, market diversification, exploring new emerging markets, branding the nation , RMG friendly government policy those are taken by competitors are to be addressed [11].

3. METHODOLOGY

Source of data

Both primary and secondary sources of data have been used. Primary data has been collected through interview and questionnaire methods. Secondary data has been collected from different relevant publications, dissertations, books, journals, newspaper articles and reports, government publications, rules, acts, websites etc.

Area of the study

For assessing safety and sustainability practice, a survey was conducted in different RMG industries located in Dhaka & Gazipur and Mymensingh zone. Respondents were drawn from factories situated in different locations of Dhaka (Plummy Fashion Ltd., Tushuka Fashion, Universal Alliance, Rupa Knitware, Microfibre group, Fakir Knitware, Viyellatex Group, Perkvview, Apex Holdings Ltd., Feroza Garments Ltd.), Gazipur (Fakhruddin Textiles Ltd., HAMS Garments Ltd., FS sweater) and Mymensingh(Square Textiles Ltd., Crown wears Ltd, SQ Celcius Ltd. Raidha Collections , Cotton Group, kalam sweaters, Rasel Garments, Hamid Garments, Supti sweaters) area using a convenient sampling technique.

Personal profile of the Respondents

There were two groups of respondent for this fieldwork. There was a structured questionnaire consisting close ended questions. First group consists of 450 worker of which 225 from compliance factory and 225 from average compliant one. Remaining 50 Respondents includes General Managers, Managers, Executives, Academic Scholar, Buyers Representative and government officials and other stakeholders.

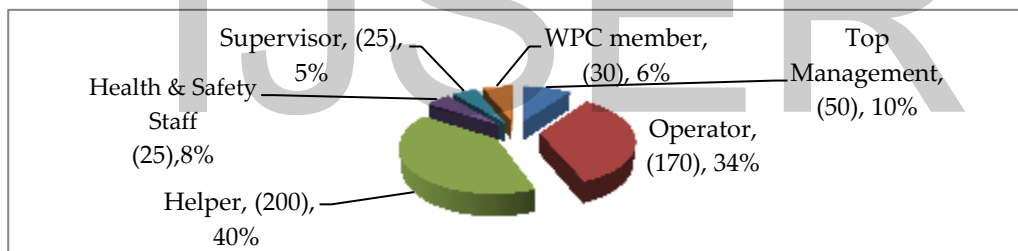


Figure-1: Profile of respondent.

4. ANALYSIS AND RESULTS

A self-constructed questionnaire was used to collect primary data considering the objective of the study. The questionnaire chart related with working conditions of RMG industries. These included emergency exit, training on health and safety, presence of Trade Unions, Harassment while working, Condition of the factory

building etc. For Data analysis data collected from both questionnaire and interview are combined. A mixed (qualitative and quantitative) method is followed to analyze the data. Here we discussed the safety issues in part-A and SWOT analysis discussed in part-B

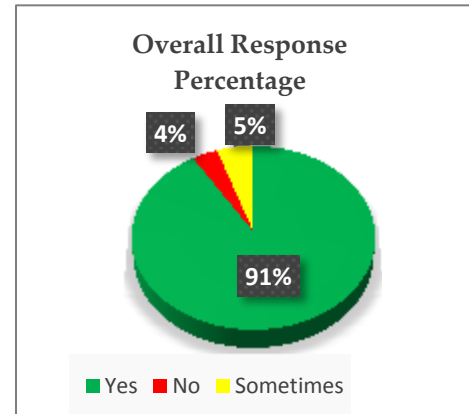
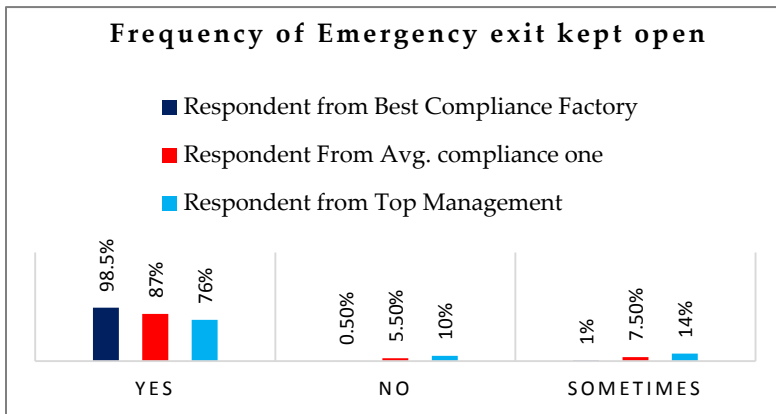
Part-A: Response regarding Safety

4.1 Frequency of Emergency Exit Kept Open

This is the first basic rules of safety. In most of the hazard emergency exit were kept blocked. Among the respondent from compliant factory 222 respondent answered that

emergency exit kept open always, while 2 respondent says sometimes kept open and rest 1 claimed as it was not open any time. On the other hand from non-compliance

companies 196 said kept open, 17 claimed sometimes and 12 says it is kept closed.



Response	Yes	No	Sometimes
Respondent from Best Compliance Projects	218	3	4
Respondent From Avg. compliance Factory	175	19	31
Respondent From Top Management	40	3	7
Total	433 (86.6%)	25 (5%)	42(8.4%)

Figure 2: Frequency of emergency exit kept open.

4.2 Presence of enough Fire Extinguishers

Table-2: Presence of fire Extinguishers

Presence of enough Fire Extinguishers is another symbol of safety. Here respondent were asked about presence of enough fire extinguisher. Among the respondent from top compliant factory 96.8% respond that enough fire extinguisher kept always, while 1.8% respond as sometimes

and rest 1.4% claimed as it is lack of. On the other hand from average-compliance companies 77.8% respond that enough fire extinguishers kept always, while 13.8% respond as sometimes and rest 8.4% claimed as it is lack of.

4.3 Frequency of Fire Drill

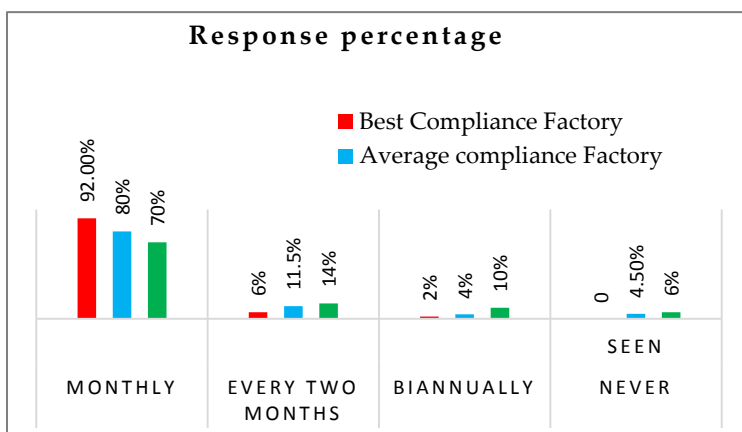


Figure 2: Frequency of fire drill

Regular fire drill is another major safety measure. This time respondents were asked regarding frequency of fire drill in their factories as per their experience. From best compliance factory 208 says experience its monthly, 13 experience it every two moth interval, 4 of them Bi-annually, and nobody says they have seen it never. Though, fire drill is supposed

4.4 Access and availability to Personal protective equipment (PPE)

Access and availability to PPE is another major safety concern. This time respondents were asked regarding access and availability to PPE in their factories. Where respondents from best compliance projects 95.5% says that they are easily accessible, of them 0.9% says not easily accessible, 12.5% says sometimes accessible.

to be arranged every six month by government circular. On

the other hand in non-compliance one 180 experience it monthly, 26 every two moth interval, 9 Bi-annually, and rest 10 says they have seen it never. And top management 35 person answer it doing in every month, 7 persons answer in every two months, 5 persons answer biannually and 3 said never seen.

accessible, 3.5% says sometimes accessible. On the other hand respondents from average compliance projects 79.5% says that they are easily accessible, of them 8% says not easily

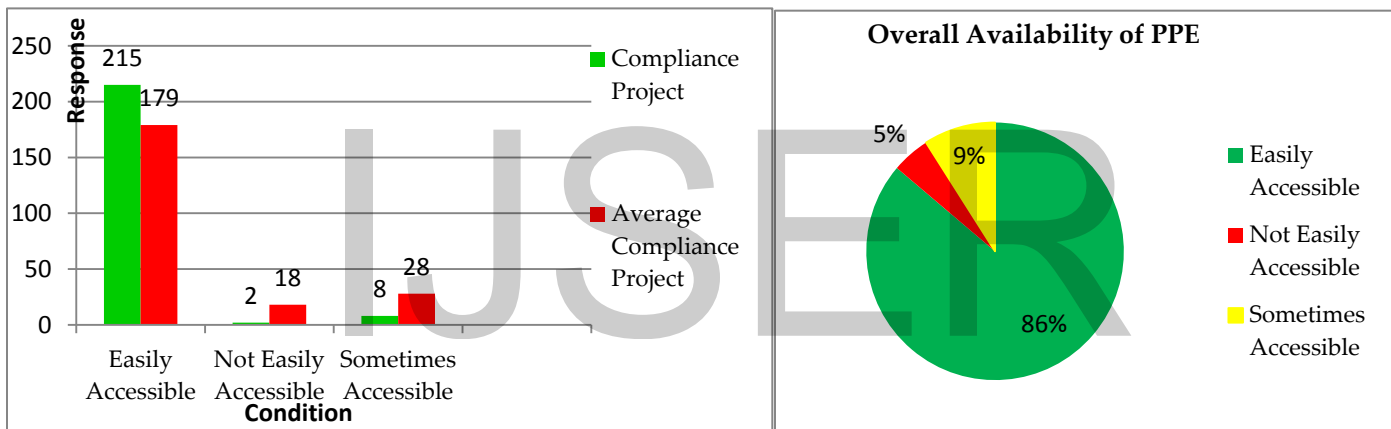
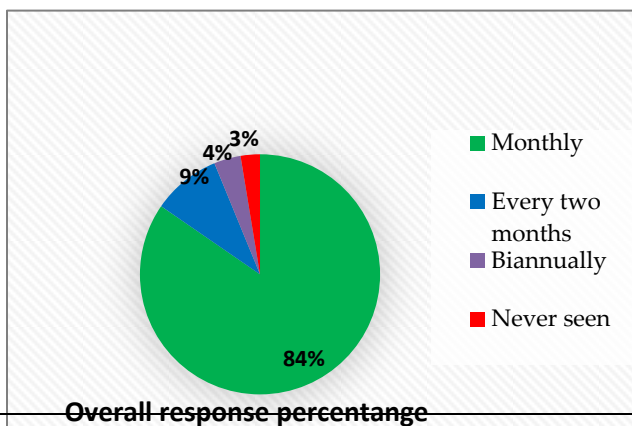


Figure-3: Availability of PPE



4.5 Presence of Union / WPC

Union/ WPC acts as collective bargaining agent for the workers. Whereby unions/WPC present workers can bargain with the management collectively for their rights and ensuring the better workplace conditions. Respondents were asked regarding presence of union/WPC. Whereby respondents from compliance projects says it is present in 93% projects, 5% says they don't know and rest 2% says absent. Respondents from non compliance projects says it is present in 42% projects, 21% says they don't know and rest 37% says absent.

Response	Present			Absent	Don't know
	Union	WPC	Total		
Respondent from best Compliance Projects	12	207	219	0	6

Respondent From Average compliance one	0	176	176	11	38
Respondents from top management	2	39	41	5	4
Total	20	414	434	22	42

Tabl e-3:

Presence of Union/WPC

4.6 Factory building condition

Respondents were asked regarding factory Condition of factory building to understand workers feel safe working in such buildings or not. From compliance projects 204 respondent feels safe ,18 says its modarate,2 says don't

know, 1 says unsafe. From non compliance projects 165 feels safe ,33 says its modarate, 5 says don't know, 2 says unsafe. Responded of top management 34 says safe, 3 says unsafe and 13 says Modarate safe.

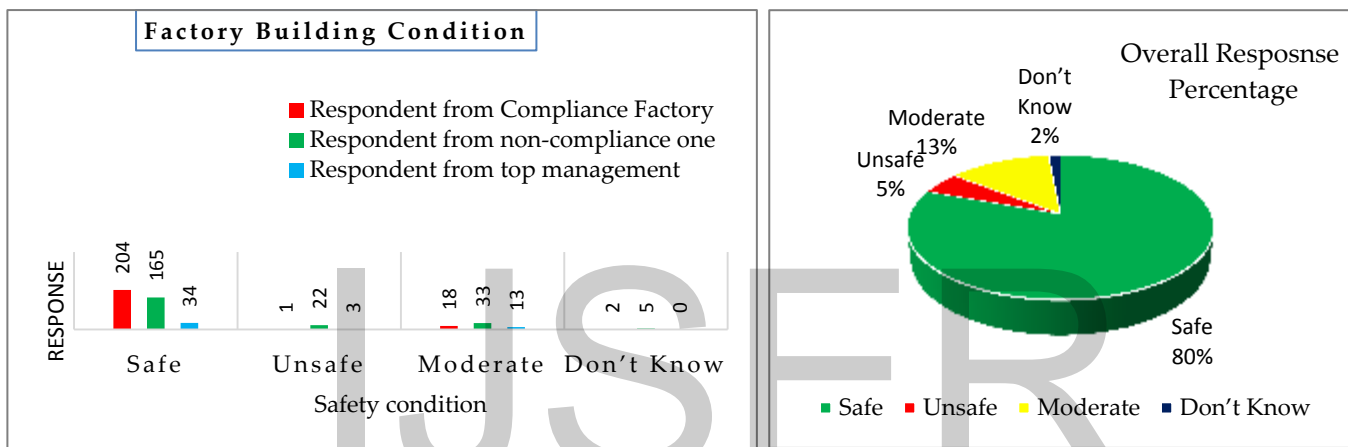


Figure-4: Factory building condition

4.7 Proper labeling of Electrical MDB/SDB/DB

Respondents were asked regarding proper labeling of electrical MDB/DB/SDB. Among respondent From compliance projects 209 says properly labeled ,2 says not properly labeled,14 says don't know. Among respondent from average compliance projects 174 says properly

labeled ,12 says not properly labeled,39 says don't know. And top management 43 respondent says properly labeled, 2 says not labeled properly and 5 don't know.

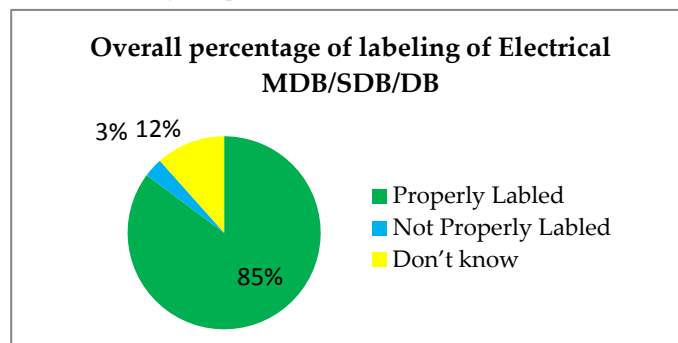


Figure-5: Proper labeling of electrical MDB/DB/SDB

4.8 Proper insulation of electrical cable loose wiring

Response	Properly Managed	Presence of loose cable	Don't know
Respondent from Compliance Factory	212	2	11
Respondent from non-compliance one	168	20	37
Respondent from top management	44	2	4
Sub Total	424(85%)	24 (5%)	52(10%)
Grand Total	500		

Table-4: Insulation of electrical cable loose wiring

Respondents were asked regarding loose wiring presence in the electrical cable. Among respondent 85% says loose

wire are properly labled , 5% says there is presence of loose cable, and 10% respondent answer that they don't know.

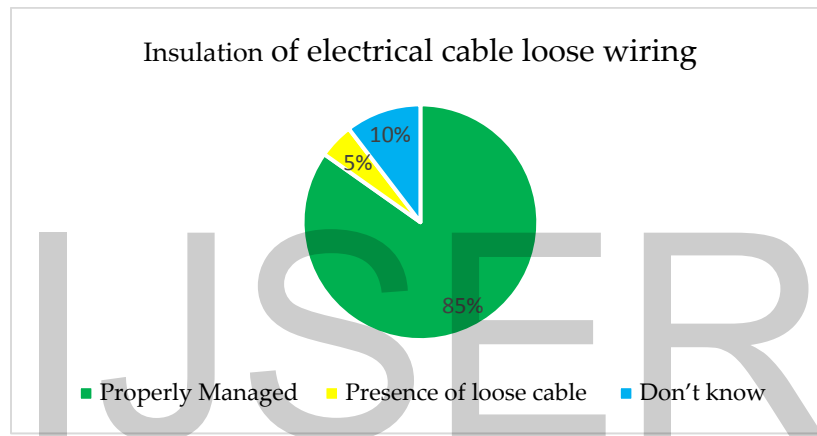


Figure-6: Proper insulation of loose cable wiring

Issues of value adding on product:

4.9 Issues behind price variation of same style from different vendors from Buyers end

Respondents were asked regarding issue behind price variation of same style from different vendor. Whereby there response was 32% Sustainability Practice, 20% Best

safety practice, 20% Employee Benefit programs, 14% Social Compliance and rest 16% says others. Other factors include goodwill and bilateral agreements etc.

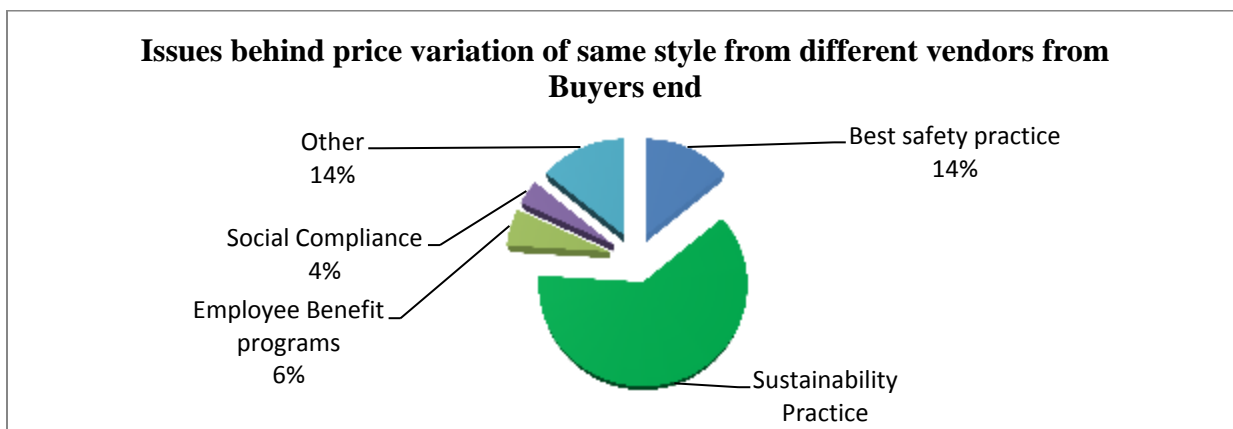


Figure-7: Factors of price variation of product in different RMG industry.

4.10 Possibility of getting high FOB orders for suppliers investing more on safety

Respondents were asked regarding their preference of ordering high FOB products to their suppliers. Whereby

93% says there ready to pay more, 5% confused and 2% says they won't pay more.

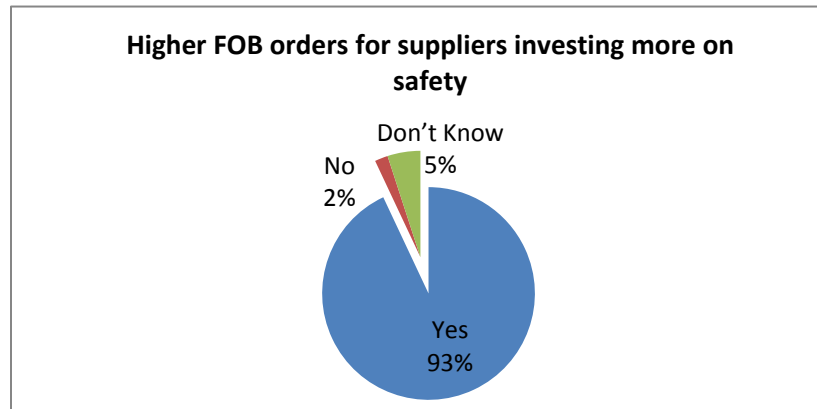


Figure-8: Higher FOB orders for suppliers investing more on safety.

4.11 Priority among factor of sustainability

Responded of top management executive are asked for multiple answer of following factors and their responses are shown in the following figure:

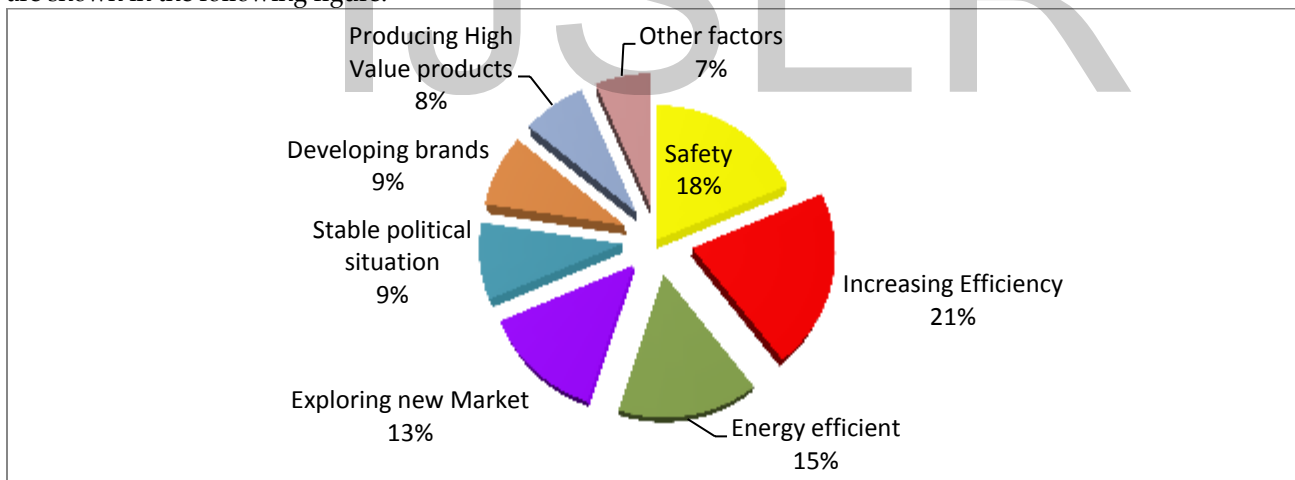


Figure-9: Priority among factor of sustainability

Part-B: Response from top management regarding SWOT analysis

For this segment 50 respondent (top Management) were asked different questions.

4.12 Biggest strength for the RMG industry of Bangladesh

Respondents were asked regarding biggest strength of RMG sector here in Bangladesh. Whereby there response was 68% says cheap labour, 5% large facility, 13% competitive price, 7% international quality, 2%

entrepreneurial spirit and 5% others. Other factors included vibrant quick learning and dedicated populations, duty free market access to most of the developed countries & PTA in India, china, Korea, Malaysia, rapid adaption of

environment friendly and green concepts. Rapidly developing backward linkage industry, and increasing

trend of direct sourcing through local liaison office at Dhaka.

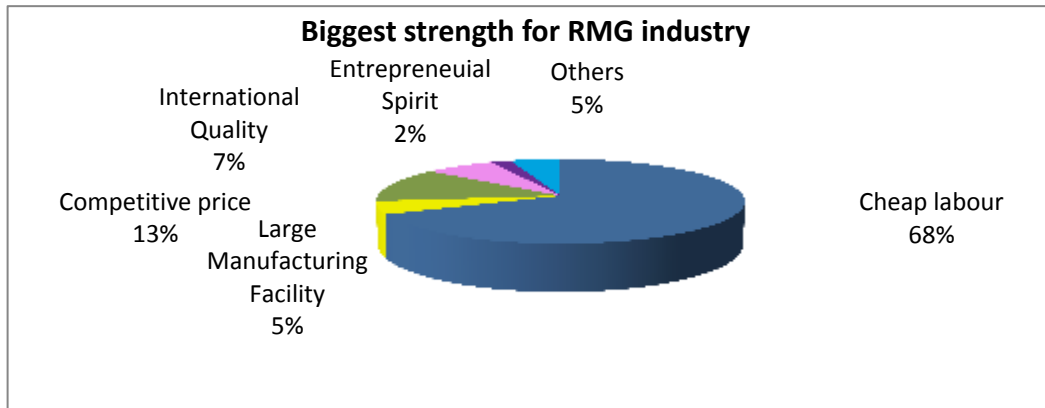


Figure-10: Strength for the RMG industry of Bangladesh

4.13 Biggest weakness for RMG industry of Bangladesh

Respondents were asked regarding biggest weakness of RMG sector here in Bangladesh. Whereby there response was 27% safety, 23% labour productivity, 18% says energy crisis, 13% price diminishing, 15% says its lack of

diversification and 4% others. Other factors included unstable political condition, low quality, competitors, buying house hassle etc.

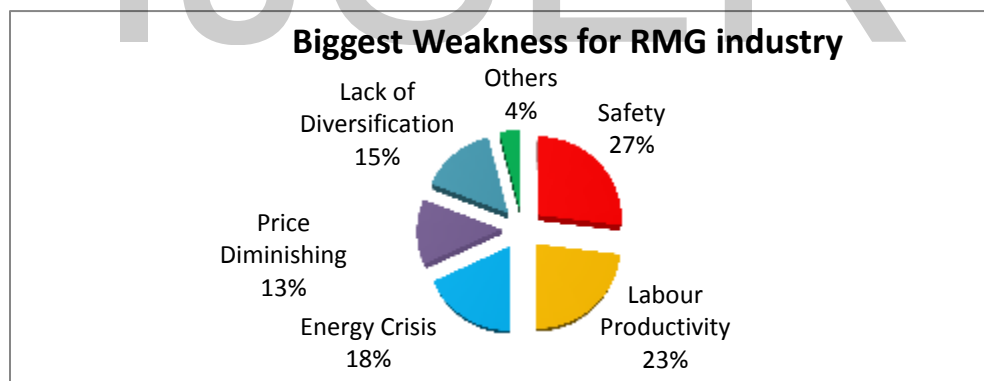


Figure-11: Weakness of RMG industries of Bangladesh.

4.14 Biggest opportunity for RMG industry of Bangladesh

Respondents were asked regarding biggest opportunity of RMG sector here in Bangladesh. Whereby there response was 46% for competitiveness, 21% for new market, 25 % for China effect (increasing labour and other cost in China), 4%

for Preferential Trade Agreements and 4% others. Other factors included lot of entrepreneurial minded people, says vibrant young population, dedicated workers, dedicated textile Engineers.

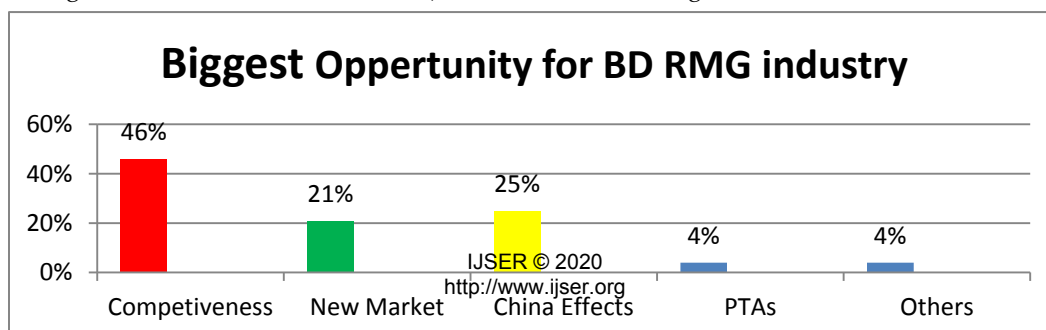


Figure-12: Opportunities of RMG industries of Bangladesh.

4.15 Biggest Threat for RMG industry of Bangladesh

Respondents were asked regarding biggest Threat for RMG sector here in Bangladesh. Whereby there response was 37% respond for political unrest, 20% for competitors, 30% price diminishing, 13% says its environment pollution and

rest 4% others. Other factors included lack of friendly government policy, raw material price hike day by day, labour unrest and capability to hold the market for long term future.

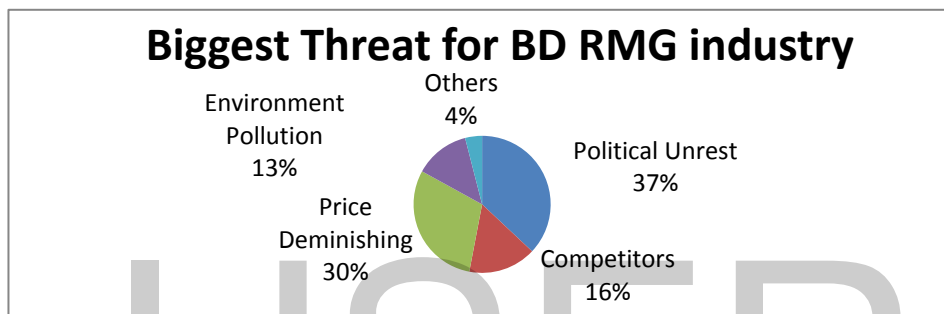


Figure-13: Threat of RMG industry of Bangladesh.

5. DISCUSSION

From the responses of the respondents we can easily know that still there is some violations in fire safety; lack of availability of PPE, unwillingness of company on fire drill like that it is only a record keeping issue even in some renowned projects [21]. Building safety issue is still a matter of concern some industries are using residential building for industrial purpose [21]. Instead of trade union there is WPC that is actually more obeyed to companies rather than fight for workers legal rights [13]. Besides trade unions registered are either biased or politically influenced and do not works for workers right. Poor wage and gender equality are needed to be practiced. Workers compensation should be updated periodically up to a living wage considering price hike and inflation of money instead of 5% current increment policy. Biggest strength of the industry found as cheap labour, safety as weakness, and competitiveness as opportunity and political unrest as threat [22].

Among the factors of sustainability increasing efficiency, ensuring workplace Safety and being Energy Efficient are

prime facts[23]. Besides Exploring New Market, Stable Political Condition, Developing own Brands, producing high value products ,environmental safety, developing common audit platform, and producing raw materials (different fibers) Chemicals and machinery locally etc [24]. According to the response of the respondent Political Unrest, competitors, Price diminishing, Environment Pollution and lack of friendly Govt. Policy, Raw material price hike day by day, labour unrest are the main threat for RMG industry[6]. Political parties should not take any harmful and destructive steps which will causes a great lose to the common interest of people such as strike[12]. From this study it is found that product price same style from different vendors from Buyers end is depends on the factory safety practices. Byers prefer placing high FOB orders in those projects investing safety. So safety invest is a win-win investment. And effects of safety factors are remarkable on sustainability. Implementing adequate workplace safety culture and providing union facility is a must for upcoming days.

6. CONCLUSION

The Ready-Made Garments (RMG) industry occupies a unique position in the Bangladesh economy. It is the largest exporting industry in Bangladesh, which experienced phenomenal growth during the last 25 years. The RMG is the lifeblood of country's economy through production, export, earning foreign exchange, contribution to GDP, creating employment opportunity, investment and business mobilization. Its importance has crossed geographical boundary of the country. To remain successful, Bangladesh needs to remove all the structural obstacles in the

transportation facilities, telecommunication network, and power supply, management of seaport, utility services and in the law and order situation above all need to be improve for sustainability of this sector. Given the remarkable entrepreneurial initiatives and the dedication of its workforce, Bangladesh can look forward to advancing its share of the global RMG market. All stake holders of the industry are to work together for ensuring further and sustainable development.

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