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Sheela Varghese*

1. Introduction

The Context, Objectives, and Methodology

The Context

India has emerged as one of the major garment producing and exporting nations of the world. Garment making is a labour-intensive industry and most of the employment goes to women. It brings foreign exchange to the country through exports.

In India, the readymade garment sector forms an important segment in the broad-based textile industry. The activities of the textile industry include spinning, weaving, and production of cloth and garment items. It accounts for about 4 per cent of GDP, 25 per cent of the industrial production, and 30 per cent of the export earnings of the country. Besides, the industry provides gainful employment to millions of people directly and indirectly.

The development of the readymade garment sector is a recent phenomenon. In 1990, 12 per cent of the total exports of India formed the largest employer in the private sector (Tyagaraj Sharma, *Economic Times*, Aug. 2, 1991). A recent report states that its percentage share in the total exportable items increased from 11.2 per cent in 1988-'89 to 12.6 per cent in

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1989-'90 to 13.2 per cent in 1990-'91, and to nearly 15 per cent in 1995-'96 (*Hindu-Business Review*, 1991). In fact, readymade garments as a commodity group occupies the third position among the principal export commodities next only to handicrafts, gems, and jewelry.

The significance of the garment manufacturing industry lies in its emergence as a 'thrust industry' bridging the technological handicap. It has carved out a special niche for itself from among India's non-traditional export products. A large number of units began functioning in recent years and the share of garment items in the value of total annual exports is fast increasing.

Another important aspect is that the major share of the workforce in this sector constitutes women. Since most of the rapidly growing number of garment units are functioning in the houses (or rented sheds) of employers, it is difficult to get a reliable estimate of their actual number. However, according to CMIE (Centre for Monitoring Indian Economy) the industry provides employment to about 15 million people, of which almost 90 per cent is women.

Most of the garment-making units belong to the unorganised sector. Hardly 15-20 per cent of the units falls in the organised sector (Sundaram, Facts for You, 1992: 16-18). Labour legislations, legal measures, and Minimum Wages Act are applicable only to a small section of the industry coming under the organised sector.

The present study purports to undertake a detailed investigation into the different types of garments units and their functioning in Kerala, with special reference to labour contracts and gender discrimination, if any.

Government Measures

In recent years, the Government of India has taken several measures for modernisation of the garment industry. The Export Policy Resolution of 1970, aimed at encouraging growth and development of the industry, provided exporters with special concession in duties, subsidies, grants, and import replenishments. In 1981, the government announced further support and tax exemption to 100 per cent export-oriented garment manufacturing units. The introduction of a soft loan scheme, during the VIIth Plan, called the Textile Modernisation Fund Scheme (TMFS), accelerated the development process of the industry.

Besides the various supportive measures of the Government, the concerted efforts made by Apparel Export Promotion Council (AEPC), State Trading Corporation (STC), Cotton and Woolen Textile Promotion Council (CWTPC), and Trade Fair Authority (TFA) contributed to the growth of the industry. As one of the objectives of the Economic Reforms is to promote exports, the New Economic Policy (NEP) package also has had a positive impact on the industry. Large number of export-oriented units have started functioning in various parts of the country in more recent years.

Economic Reforms

India is passing through a period of socio-economic transformation in the labour market after the implementation of the NEP package. Its operation since 1991 involves privatisation, globalisation, devaluation, deregulation, and stabilisation. The process of increasing interaction of domestic economies with the world economy, termed as 'globalisation', increases interdependence among national economies. In the process, feverish efforts take place on the part of producers to cut down costs and overheads. They lead paradoxically reverse process in the introduction - the process of casualisation and informalisation (Nigam, 1992).

A new international division of labour is being driven by the global restructuring of production (OECD, Structural changes 30). The employment scenario is changing – intensification of the process of feminisation and casualisation of labour force which is reported as a global trend (International Labour Organisation, 1995). India has completed the initial phase of Economic Reforms and it is time that an assessment of the impact of the New Economic Policy package in the export-oriented units is made.

In fact, the process of global integration of the Indian economy has transformed the very logic of production and there is a growing trend towards contracting and subcontracting of work and use of irregular and flexible labour. This is happening in the different export-oriented industries in the country. Export Processing Zones (EPZs) were started in Noida, Santa Cruz, Madras, Cochin, and Kandla etc. The main item produced in all these industrial complexes comprises garment products.

Exports

It is worth to present the position of India in the world export of garments. When India entered the readymade garment export market in the seventies, there were already countries such as Korea, Hong Kong, and Taiwan well-entrenched in the market. Until the end of the 1980s, the top four garment exporters of the world were Hong Kong, Italy, South Korea, and Taiwan.

China emerged as a leading exporter in the second half of the eighties and today it occupies the topmost position among garment-exporting nations. India and Bangladesh are also now in the fray.

Table 1.1 shows the relative position of Indian garment exports in 1980, 1990, and 1995. A comparison with other Asian countries and industrially advanced countries of the west in terms of the share in the world exports is illustrated in the table.

From 1.5 per cent of share in world exports of garment items in 1980, India has attained 2.6 per cent in 1995. It is noticed that only China, India, Thailand, Turkey, and Indonesia are the few countries that had a continuous progress in the export of garment items.

Table 1.1 Percentage Share of World's Leading Exporters of Garments, 1995

Exporting Countries	Share in the World Exports		
	1980	1990	1995
a. South-east Asian Countries			
Hong Kong	11.5	8.6	6.0
China	4.0	8.9	15.2
South Korea	7.3	7.3	3.1
Thailand	0.7	2.6	2.9
Chinese Taipei	6.0	3.7	2.1
Indonesia	0.2	0.5	2.1
b. Indian Sub-continent	1.5	2.3	2.6
c. Advanced Countries			
Italy	11.3	10.9	8.9
Germany	7.1	7.3	4.7
US	3.1	2.4	4.2
France	5.7	4.3	3.6
Turkey	0.3	3.1	3.9
Portugal	1.6	3.2	2.3
U K	4.6	2.8	2.9
Netherlands	2.2	2.0	1.8
d. Other Countries	32.9	30.1	33.7
Total	100.0	100.0	100.0

Source: Ramaswamy K.V and Gary Gereffi, 'India's Apparel Sector in the Global Economy', EPW 33.3 (1998): 124 quoted from GATT, 1994, Table III. 41 and WTO, 1996 Table IV. 58.

Table 1.1 provides data on the garment export of the leading countries only. The regions are grouped into four categories: South-East Asian countries, Indian subcontinent, advanced, and other countries. The South-East Asian countries have a share of about one-third in world exports of garment items. In 1995, China and Hong Kong together accounted for more than one-fifth. In fact, their share rose from less than 16 per cent in 1980 to more than 21 per cent in 1995. Data of the value of exports of the major garment exporting Asian countries for 1994 are presented in Table 1.2.

Table 1.2. Value of Garments Exports from Selected Asian Countries, 1994

Countries	Value (million dollar)
China	23,793.5
South Korea	5,692.6
India	3,711.9
Indonesia	3,272.9
Malaysia	2,075.8
Pakistan	1,618.0
Bangladesh	1,245.7

Source: Ramaswamy and Gereffi (125) ; Computed from Table 6 as quoted from UN International Trade Statistics Yearbook, 1994.

The value of garment exports seems to have been much lower than that of China, but higher than those of Indonesia, Malaysia, Pakistan, and Bangladesh. India's garment exports (in dollar value) more than doubled during the five-year period from 1990 to 1995.

Our garment exports are reportedly better (in terms of performance and reliability) than those of Pakistan, Sri Lanka, Bangladesh, and Thailand. However, we lag behind Singapore, Hong Kong, and Korea. Recent reports indicate that India could expect big orders from west Asia (Sundaram, Market survey, 1994:17). Manjit Singh (1991:97) states that Indian garments are gaining increasing acceptability all over the world including developed countries.

India's share in the imports of readymade garments of the US economy is fast increasing. Since the mid-eighties, US has remained India's major quota market. The figures relating to 1990 and 1996 indicate a sharp increase of all types of readymade garments imported from India. According to United Nation's International Trade data, US absorbed 36 per cent of India's total apparel exports.

The continued export success of newly industrialising East Asian countries is attributed to quality upgrading and shift to higher value-added segments (Ramaswamy and Gereffi, 1998:129). A significant observed feature of India's apparel exports is the predominance of cotton as the fibre base and the concentration of a few items in the composition of garment exports.

Largely, garment exports grew almost from the scratch (in 1960-61) to its present position during a span of three decades. However, the growth rate was the highest since 1980. Data on the value of total exports and of garment exports of India is given in Table 1.3.

Table 1.3 Growth of Exports of Readymade Garments from India - 1960-1991 period (*Rs crore*)

Year	Value of Garment Exports	Value of Total Exports	Percentage share of Garment Exports
1960 -61	1	643	0.15
1970 -71	29	1535	1.89
1980 -81	550	6711	8.20
1984-85	953	11744	8.11
1985 -86	1067	10895	9.79
1986- 87	1331	12452	10.69
1987- 88	1818	15674	11.60
1988- 89	2099	20232	10.37
1989- 90	3224	27681	11.65
1990- 91	4042	32527	12.43

Source: Economic Survey. Government of India, 1990-91

The increase in exports has led to important changes in the structure of the industry leading to the emergence of a system of intensive contracting and subcontracting with ancillary units. This development is mainly the outcome of the large-scale export of garment items by manufacturers who have linkages with multinational corporations.

The growth of India's export of readymade garment items was the highest, during the 1980s, among all garment-exporting countries of the world. Over the five year period from 1985-86 to 1989-90, garment exports grew at an average annual rate of 32 per cent (Sundaram, 1992:16).

Textiles and garment apparels comprise of the single largest chunk of exports (25 per cent of the total) from India (Chatterjee and Mohan, 1993:95).

Data relating to the quantity and value of garment items produced for domestic market and export for 1986-1990 are shown in Table 1.4.

Table 1.4 India's Production of Readymade Garments in India, 1990
(Quantity in million pieces and value in Rs. crore)

Year	Domestic Market		Export		Total	
	Quantity	Value	Quantity	Value	Quantity	Value
1986	369	2320	264	1218	633	3538
1987	733	4611	318	2000	1051	6611
1988	1010	5080	380	2148	1390	7228
1989	1813	7000	420	2470	2233	9470
1990	2355	8500	455	3000	2800	11500

Source: Indian Export Bulletin, 1990

Note: Figures pertain to calendar years

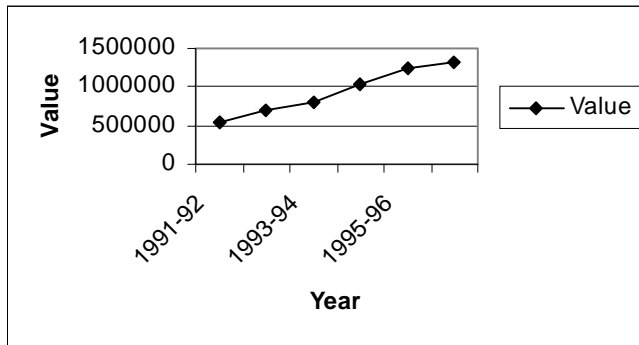
According to a market survey, the value of garment exports from India rose from Rs 4,050 crore in 1990-'91 to Rs 8,112 crore in 1993-'94 and Rs 13,294 crore in 1996-'97 (Table 1.5 and Figure 1.1).

Table 1.5 Value of India's Exported Garment Exports, 1991-1997
(Rs. cr)

Period	Value
1991-'92	5421
1992-'93	6931
1993-'94	8112
1994-'95	10305
1995-'96	12295
1996-'97	13294

Source: CMIE April 1997

Chart Showing Value of India's Garments Exports 1991-1997



Source: Computed by the researcher

It is found that the data provided by different agencies are not exactly consistent with one another. However, the rapid growth in production and exports of readymade garment items is clearly reflected in them.

An Overview

Studies about the employment of women in the garment industry are numerous. Some of the more recent among them are conducted by Ela Bhatt (1987), Nirmala Banerjee (1988), Irene Tom (1989), Ranjan (1989), Saritha Agarwal (1990), Sahiba Husain (1991), Kumud Pore (1991), and Kalpagam (1992). They were conducted mostly in the metropolises such as Calcutta, Delhi, Allahabad, Mumbai, and Chennai. In more than 90 per cent of the garment manufacturing units studied, women formed the large majority of workers.

Based on a study of garment industry in Calcutta, Nirmala Banerjee states that the entry of women in large numbers in the garment industry is a phenomenon that began from the early eighties not only in India but in most of the other developing countries as well.

The growth rate of women workers in the export-oriented industries was more than twice that of men workers in Korea, Malaysia, and Singapore; and women accounted for about half of the manufacturing workforce in these countries (Banerjee, 1991:239). ILO reports indicate that the situation was similar in many other South-East and East Asian market economies. Most of these countries are deeply involved in 'the new international division of labour' brought about through investment in Third World countries by the multinational corporations (MNCs).

In India, use of female labour through the putting-out system for world market production is established in a large number of industries especially in the garment industry (Husain and Rao, 1991:188). It is found that women are employed in relatively low category and low paid jobs. Within the same industry, they get in the majority of cases only the status of

‘reserve labour’ reflecting the prevalence of gender discrimination with respect to wages and occupations in the labour market (Ramaswamy, 1991:214).

It is found that even the workers of Export Processing Zone (EPZ) do not come under the organised sector. In a study of garment workers of Santa Cruz EPZ, Divan states that security of job is totally absent and wages are not given according to the Minimum Wages Act; they are appointed purely on contract basis (Divan, 1993:53–58). The rapid growth of the size of contract labour (which is unprotected by the labour laws) and increased retrenchment of workers coupled with their large-scale unemployment lead to marginalisation of women (Deshpande 1992:72-86). According to Pore, “Putting out system and the physical segregation of production process has proved to be one of the subtle methods of denying their rights” (Pore, 1995:215-36). Banerjee also affirms that “an accent on exportable items in the export-oriented industries under the putting out system created new type of exploitation of women” (Banerjee, 1991:292). Ultimately, it led to feminisation and casualisation of the labour force and marginalisation of women in the low categories of jobs.

In most of the EPZs, garment manufacturing is the main item of production. Most of these units adopt a variety of production methods and the mode of payment is different, the only unambiguous criterion being profitability. Most of the industrial units in EPZ have a definite preference for young unmarried women for work on assembly line production and the policy of subcontracting and putting out system is practised widely in these units. Division of jobs on gender basis and segregation of women to marginal occupations are a common feature noticed in several studies. Increase in the employment of women in recent years in a number of export-oriented industries has also been pointed out.

Scope of the Study

The implementation of Economic Reforms at the national level had its repercussions in Kerala also. The trend of increased feminisation and casualisation of labour force in the context of the State has yet to be examined. There is already an overwhelming presence of women in the unorganised sectors, especially outside agriculture.

With the spread of education and the attainment of higher levels of education, the value system and socio-cultural attitude of a society undergoes changes. Aversion to physical work in the agricultural sector grows; educated persons increasingly look for white collar and other ‘indoor’ jobs. As per 1991 census figures, 58.5 per cent of women workers in Kerala are engaged in the non-agricultural sector compared to 21.6 per cent for the women of India. To some extent, the socio-economic transformation of the State and the increased literacy rate has led to a shift of the workforce from traditional to modern occupations. Many women are entering into some new occupations which are becoming increasingly available such as agro-processing, chips making, fish processing, orchid tissue culture, garment manufacturing, and flower gardening. Among

these, the garment making industry deserves special attention as it is a fast growing industry and women are increasingly getting absorbed into it. Even educated women are overcrowding these modern industries because of ease of entry, low skill requirements, and little competition from men.

The Cochin Export Processing Zone (EPZ) of Kerala was established at Kakkanad in 1991. Around 5,000 workers (4,800 women and 200 men) are employed at CEPZ. The zone has acquired 210 acres of land for starting the industrial complex with different industrial units such as electronics, engineering, garment-making, plastics, frozen food, orchid tissue culture, ceramic products, gloves, and perfumes. Among these, the industrial units producing garment items are more significant in terms of the number of workers and the value of exports.

In addition to the garment units functioning under CEPZ, in which the entire products are exported, a number of independent manufacturers in Kerala also produce garment items both for export and for the local market. It is noticed that some of these export-oriented units in the State are owned and managed by big manufacturers, who have their headquarters in other States.

In 1996, the All Kerala Garment Manufacturers Association was formed. At its first annual meeting, manufacturers of the big and the small units discussed problems faced by the industry. It is estimated that more than 5,000 garment manufacturing units are functioning in the State. Total employment - direct and indirect - in all these units taken together, comes to about four lakh persons. The functioning of multitudes of unregistered household industrial units producing garment items was highlighted in the meeting and the relevance of the garment industry in terms of employment generation and export promotion potential was considered.

Official estimates are not available relating to the share of Kerala in the garment production of the country as a whole. However, reports published in the market surveys indicate that the products made in Kerala are superior to the rest in designing, fashion, and stitching.

The Problem

Though several studies about the garment industry in other parts of India exist, little effort has gone into studying this industry in Kerala. Most of the theoretical and empirical research in the context of employment of women in the State have neither discussed their involvement in the production process nor considered their participation in industrial development. Issues such as the significance of feminine-intensive industries in industrialisation and growth of export earnings of the economy in the wake of Liberalisation and SAP have not yet formed the topic of serious research in the State. An assessment of the consequences of economic reforms and of the starting up of a number of export-oriented industries in the Export Processing Zone including their impact on the labour market of Kerala is over due. We propose to fill this lacuna to some extent through the present exercise.

Objectives

The main objectives of the study are the following:

- (i) To examine the relevance of the garment industry in the economy of Kerala, the contribution of women workers towards the development of this industry and the extent of and factors for feminine intensity of the industry. The method of recruitment of workers, and the push (poverty and unemployment) and pull (prospects of modern industry) factors which contribute to the growth of this industry are also discussed;
- (ii) To assess the demographic and socio-economic background and living conditions of workers in a gender perspective. Involvement of women workers in trade union activities and its implications on wage and living conditions;
- (iii) To analyse the pattern of employment in the different types of garment producing units in terms of occupational specificity, gender discrimination, and vertical and horizontal segregation of women workers. The question of overcrowding of women in marginal occupations will also be examined.
- (iv) To assess the mode of payment and wage structure of workers. In this connection, the extent to which wages are conditioned by supply conditions will be discussed.
- (v) To probe into the occupational mobility of workers. Questions of inter-generational and spatial mobility also will be looked into.
- (vi) To find out the extent to which the economic reforms affect the workers employed in the export-oriented units and the other units producing for local purposes. In this context, the different forms of labour contracts including subcontracting systems practised in this industry will be investigated.

Sources of Data

Both primary and secondary data are made use of in this study. Secondary data are taken from ILO reports, and publications of Labour Bureau, Directorate of Economics and Statistics, professional journals and newspapers, and surveys and studies made on the topic. Since these sources do not provide information adequate for our analysis, we have conducted an exhaustive field survey among workers employed in this industry. The primary data collection was done during the year 1997 keeping the reference period of study as 1996-'97. The survey took about eight months for completion.

Methodology

The garment-producing units functioning in the State, export-oriented units and units producing for local markets, form the universe of the study. Since the structural variety of garment units is complex, the following criteria are used to identify the units:

- (i) Location: Those units belonging to Export Processing Zone and outside;
- (ii) Nature of the production process used: ie whether assembly line production or not; and
- (iii) Registration: Whether registered or unregistered.

Based on these criteria, the units are grouped into four types:

- (i) Units operating in the Cochin Export Processing Zone (CEPZ). All these units have the assembly line production process and their entire production is meant for export. Although the units are registered, the workers do not have any security of employment and come under the unorganised category.
- (ii) Independent garment units functioning with assembly line production process outside CEPZ and producing garment items both for export and for supply to the local market. These units are also registered but hire workers on contract basis; these workers are also of the unorganised category.
- (iii) Registered SSI units that do not follow the assembly line production process but function with a number of sub-units.
- (iv) Unregistered industrial units functioning in rented sheds or in the houses of the employers or at the houses of the workers themselves, as household industrial units.

Information collected from the field survey is analysed on the following basis: In the units belonging to types 2, 3, and 4, production is carried out either independently or on the basis of contracts entered into with wholesalers or exporting companies. Thus, the distinction is between CEPZ units and all non-CEPZ units taken together. Since types 1 and 2 are export-oriented, a comparison is possible between them, namely between CEPZ and non-CEPZ units. The unregistered units form only the last category and hence, the distinction between the registered and the unregistered units is done for a comparative analysis. In all these cases, the discussion is undertaken from a gender perspective.

The workers belonging to CEPZ may be considered unorganised despite the fact that CEPZ units come under the category organised sector with respect to techniques of production and the number of workers employed. However, the workers do not receive the benefits of the organised sector. Since trade union activities are strictly prohibited in the CEPZ area, the workers are not unionised. In the assembly line units and the other registered units too, workers are appointed on contract basis and are not provided the facilities of organised sector.

The field survey was done in two stages. In the first stage, a pilot study was conducted among 30 workers of CEPZ, registered units covering assembly line, non-assembly line, and unregistered units. Based on the results of the pilot study and suggestions from experts, the interview schedules were modified.

Area of Study

Ernakulam district was selected as the area of study for several reasons. According to data supplied by Department of Economics and Statistics of the Government of Kerala, Ernakulam district had the maximum proportion among the total manufacturing enterprises in the State. Out of the SSI (Small-scale Industries) units registered in 1995-96, 21.9 per cent are run by women and in this regard, Ernakulam maintains the top position.

It is found that Ernakulam district has the highest proportion (26.5 per cent) of women industrial units, most of that started functioning after 1990 (Women industrial units are those

which are run by women and in which women form more than 80 per cent of the total workers). It is learnt that among the women industrial units of the State, garment-producing units constitute the vast majority. Again, of the garment units of the State, 32.2 per cent are located in the Ernakulam district (*Economic Review*, 1996). The Ernakulam Corporation area is selected for the study because of the high intensity of garment-producing units in the locality.

Selection of Sample

Primary data were collected from two groups of respondents, ie the manufacturers of garment units and workers in garment units. All types of garment-producing units, CEPZ, independent assembly line, and registered, and unregistered units were included in the study. From among the manufacturers of each category, 10 per cent were chosen as sample and 36 manufacturers were interviewed. From each garment-producing unit, 20 per cent of the workers were selected as sample.

We selected three units representing each category from the big garment units functioning in the CEPZ with different production techniques and working conditions. The total number of registered garment units in the Ernakulam Corporation area as reported by the Directorate of Economics and Statistics is 91 as on March 1996. These registered units are of two types: with assembly line production process producing both for export and local purposes and without assembly line production.

A sample of 10 per cent, comprising nine units have been selected from the registered units on random basis with three assembly line production units and six non-assembly line (registered) units.

A number of unregistered units function in the houses of employers and workers and they outnumber the registered ones. The number of unregistered units in the study area comes to more than 220. We have selected 24 unregistered units covering all varieties of production processes.

From each unit, 20 per cent of the workers were interviewed. In all, the sample consisted of 250 workers, 100 from the CEPZ units, 32 from the assembly line units, 28 from the registered units, and 90 from the unregistered units. Workers were selected from each unit in proportion to the total members in that unit.

We have interviewed the manufacturers/proprietors of the different types of garment units for getting information regarding the functioning of the units. The total sample constitutes 36 manufacturers. Analysis of data collected from manufacturers regarding the functioning of the garment producing units is presented in section 2; discussion on the conditions of workers is given in section 4. Table 1.6 gives details of the sample of workers selected for interview.

Concentration of women workers is high in all the types of units. From each unit, 20 per cent of the workers were selected as the sample. The total sample of workers comes to 250.

Table 1. 6 Number of Workers in the Selected Industrial Units

Units		Total (No.)			Sample (No.)		
Type	No.	Men	Women	Total	Men	Women	Total
CEPZ	3	57	445	502	11	89	100
Assembly line	3	13	147	150	3	29	32
Registered	6	11	126	147	2	26	28
Unregistered	24	18	434	452	4	86	90
Total	36	99	1152	1251	20	230	250

Collection of Data

It was an uphill task to get the workers for interview. Workers of CEPZ units are not allowed to talk to outsiders during the working hours ie from 7 am to 6 pm. We could meet them only outside the CEPZ area but that was also difficult because, after coming to their rented rooms, they are busy with their household chores. Besides, they are hesitant to tell about their work and wage conditions due to fear of being expelled from job.

In the case of assembly line and registered units, the employers do not welcome an outsider who makes enquiries into inconvenient areas, such as facilities and performance. It was not easy to convince the employers and the employees about the purpose of the study. As 30-40 minutes are spent for interviewing one respondent, we could cover only a limited number of workers per day. It is difficult to trace the unregistered units as they frequently shift from one place to another to escape tax officials.

Structure of the Report

This report has six sections. The structure of the garment industry in terms of organisation, ownership, production technique, product-mix, labour status, mode of payment, etc of the units, is discussed in Section 2. Section 3 elaborates the socio-economic conditions, occupational status, and occupational and spatial mobility of workers in the garment making industry.

Labour market conditions in the garment industry are examined in section 4 with a detailed analysis of the method of recruitment, occupational distribution, wage structure, and working conditions of workers. It also deals with the labour contract system in vague.

Section 5 examines the gender discrimination prevailing in the garment industry. The concluding section presents the summary of findings and draws broad conclusions. The role of women in the development of the industry and the extent of their exploitation are highlighted.

2. Size and Structure of Garment Industry

In this section, the size and structure of garment-producing units is analysed. Varied aspects such as the age of the unit, its feminine intensity, raw material sources, production techniques, product-mix, payment methods, and marketing problems are discussed.

Types of Work in the Garment-producing Units

(i) Garment-producing units in the Export Processing Zone:

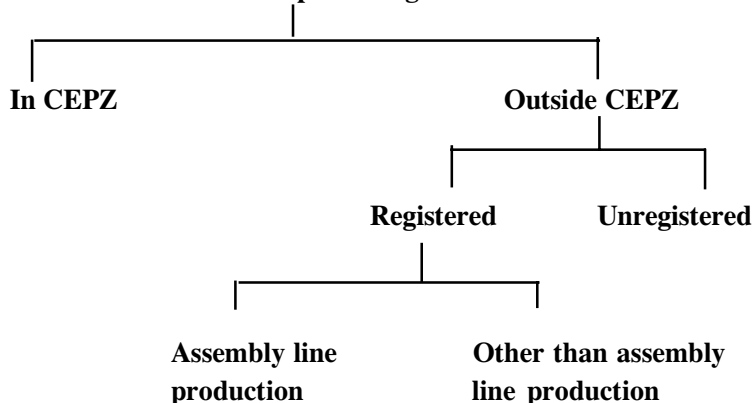
In the CEPZ units, the assembly line production process carries out garment production. Usually there are 8 or 10 lines of production in 12-15 rows in which the machine operators use power machines to stitch different parts of the garment, each operator doing a specific item. Only women are employed as machine operators. In a line, all the operators perform the same kind of work.

When the work of all operators in a row is finished, the stitching of a garment item also would be finished. Other workers do handwork and finishing work. Males are employed in the high category while women are clustered in the low category, low status jobs. The entire production is exported and the units are totally excluded from payment of all forms of tariffs and duties.

- (ii) In the registered assembly line units, production is made for export as well as for the local market. Assembly line production process prevails with five or eight lines of production arranged in six or seven rows in big units. Big contractors from the neighbouring States of Tamil Nadu and Karnataka own some of these units. Splitting-up of the production process and the segregation of women workers in the low category jobs is a practice followed in all these export-oriented units.
- (iii) There are different sub-units producing on own account or on contract basis in the registered non-assembly line, garment units. Division of labour is practised in some units. Most of the workers are employed on contract on piece-rate basis. Men are employed in the higher category jobs on a time-rate basis.
- (iv) The majority of the unregistered units is functioning in the houses of employers or in the rented sheds. In such units, the employer functions as both the supervisor- and the worker. Contracting and subcontracting of work is widely practised in the unregistered units. Sometimes households of workers also function as production units. These units also take orders on subcontract basis. The number of unregistered units far exceeds all other types of garment producing units taken together.

The structure of the garment industry is shown below.

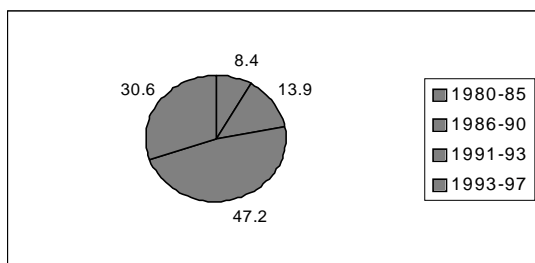
Chart 2.1 Structure of Garment Manufacturing Industry
Garment producing units



Year of Establishment of Industrial units

As garment production is a recently developed industry, which has flourished after implementation of economic reforms, the proportion of industries established after 1991 is large. According to sample, 47.2 per cent of the units were established during 1991-93 and 31 per cent after 1993 (Figure 2.1). The preponderance of units begun after 1991 is a feature noticed not only in Kerala but in all other States as well.

Figure 2.1. Year of Establishment of Garment Units



The distribution of the units by type and the period of their establishment is given in Table 2.1. The large majority of the units belonging to all types except the registered category were established after the introduction of the New Economic Policy. The increase in the number of unregistered units is much higher than that in the other types of units, indicating the rapid growth of the subcontracting system. It is noticed that three-fourths of the units, which came up since 1991, are of the unregistered type (Table 2.1).

Table 2.1. Distribution of Units according to the Year of Establishment

Period	CEPZ	Assembly	Registered	Unregistered	Total
1980 – '90 (before NEP)	Nil	1	4	3	8
	(0.0)	(12.5)	(50.0)	(37.5)	(100.0)
1991 onwards (during NEP)	3	2	2	21	28
	(10.7)	(7.1)	(7.1)	(75.0)	(100.0)
Total	3	3	6	24	36
Percentage of the Units established during NEP	100.0	66.6	33.3	87.5	77.7

Source: Survey data

Location and Ownership

The CEPZ units have own buildings and function under the CEPZ Company. Manufacturers having wide business networks and international contacts run these units.

One-third of the registered units (assembly line and non-assembly line units) also have their own fixed locations for carrying out production. The remaining units operate in rented buildings and may shift from location to location. The owners of these units seldom visit the

places of production, some of whom belong to other States (Table 2.2).

Table 2.2 Distribution of units according Location

Location	CEPZ	Registered	Unregistered	Total
Own Building	3(100.0)	3(33.3)	1(4.2)	7(19.5)
Rented sheds	—	6(66.7)	7(29.2)	13(36.1)
House, Outhouse of employs	—	—	12(50.0)	12(33.3)
House of workers	—	—	4(16.7)	4(11.1)
Total	3(100.0)	9(100.0)	24(100.0)	36 (100.0)

Source: Survey data

Half the unregistered units function in the houses or outhouses of the employers. Units in which production is carried out in rented buildings (29.2 per cent) often change location. One-sixth of the units are located in the houses of workers themselves. Workers take contracts from agents of big manufacturers or dealers. These agents (subcontractors of big dealers or exporting companies) provide cloth and other materials to the workers according to terms and conditions of the contract. Most of these household industrial units are unnoticeable. This kind of subcontracting is widely prevalent in the garment industry.

Excluding the CEPZ units, 42.4 per cent of the units are proprietary concerns operated by men. These are assembly line units, 50 per cent of them registered and 33.3 per cent of unregistered. Women are proprietors in 33.3 per cent of the registered and 16.7 per cent of the unregistered units. Around one-sixth of the registered and one-third of the unregistered units are run by husband and wife teams. In the remaining unregistered units, women workers take contract work and carry out production independently in their own houses.

Structure of the Units

Garment-producing units may be classified into those (75 per cent) producing garments and others (25 per cent) producing and selling garments. Under the latter, there are a few registered and unregistered units.

Source of Raw Materials

All the CEPZ units import all their inputs (ie cloth and other materials for production. The assembly line units purchase these items from abroad as well as from other States. These manufacturing units who cater to orders from abroad follow the production norms of the international subcontracting system.

Some of the registered (16.7 per cent) and unregistered (12.5 per cent) units purchase raw materials from within the country from cities such as Mumbai, Surat, and Coimbatore. It is learnt that materials are available at competitive prices only outside Kerala. Among the

registered units, while one-third purchase from the local area, half the units receive raw materials from contractors and wholesale dealers. For two-third of the unregistered units, wholesale dealers and contractors are the main suppliers of raw materials. 20.8 per cent of the units purchase raw materials from the local market (Table 2.3).

About 53 per cent of the sample units receive raw materials under the contract system.

Table 2.3 Distribution of Units according to Source of Raw Materials

Source of Raw Material	Category of Units				
	CEPZ	Assembly	Registered	Unregistered	Total
Foreign countries	3 (100.0) (100)	2 (66.7)	— —	— —	5 (13.9)
Other states	— —	1 (33.3)	1 (16.7)	3 (12.5)	5 (13.9)
Local market	— —	— —	2 (33.3)	5 (20.8)	7 (19.4)
Contractors	— —	— —	2 (33.3)	8 (33.3)	10 (27.8)
Wholesale Dealers	— —	— —	1 (16.7)	8 (33.3)	9 (25.0)
Total	3(100.0)	3(100.0)	6(100.0)	24(100.0)	36(100.0)

Source: Survey data

Technology

The production techniques followed in the garment units are varied. In the export-oriented units, production is along the assembly line process. The production process is divided into different stages such as checking of raw-materials, pattern making, cutting, tailoring, padding, buttoning, checking of finished products, labeling, ironing, and packing. Each group of workers is engaged in different stages. Only women are employed as machine operators (stitching section).

Males are employed, in general, on regular, permanent basis whereas females are employed on contract / temporary basis. These export-oriented units concentrate on production; they do not take up sales. Most of these units have multinational linkages and carry out production under the international subcontracting system.

In the registered and unregistered units, production is made according to the batch process. In this case, each worker could makes a complete, finished product. Most of these units also work under the contracting (and subcontracting) system. The wholesale dealers provide clothes to the contractors who employ workers on contract basis. At any given time, only items of the same pattern and fashion are produced.

In some cases, the employer functions as the supervisor-cum-worker or as the master cutter. There are also instances where the contractor subcontracts work to different agents who in

turn employ workers in own houses or in their vicinity to enable personal supervision. In some cases, contractors allot work to several workers to produce garment items in the latter's houses. Thus, a variety of contracting and subcontracting systems is found in the garment industry. In all the cases, the employers or contractors gain high profits and the workers work long hours under strict supervision for low returns.

Ladies' garments, undergarments, and mixed items are produced for contractors according to order. The contractors supply cloth (of 100-150 metres in length) to the workers and the workers make specific items of garments according to the stipulated fashions and designs. Garment items produced for wholesale dealers are mostly of fine texture and higher quality, and design than those produced for contractors. However, all items are checked and the defective ones are rejected by the contractors and wholesale dealers.

Product-mix

The garment items produced in the different units vary in design and type. Winter garments, jogging suits, quilts, jackets, over coats, hats, etc are produced in two-thirds of the CEPZ units to cater to foreign demand. The other units in the CEPZ produce uniforms for school children of Dubai, Bahrain, Saudi Arabia, and other countries of the Middle East. The product-mix of the different types of garment producing units is illustrated in Table 2.4.

Table 2.4 Distribution Units according to Type of Products

Type of Products	CEPZ	Assembly	Registered	Unregistered	Total
Jogging suits, overcoats, hats etc	2 (66.7)	—	—	—	2 (5.6)
Gents' garments	—	—	1 (16.7)	3 (12.5)	4 (11.1)
Ladies garments	—	—	2 (33.3)	8 (33.3)	10 (27.8)
Undergarments	—	2 (66.7)	—	5(20..8)	7 (19.4)
Kids' garments	1 (33.3)	—	—	4 (16.7)	5 (13.9)
Mixed items	—	1 (33.3)	3 (50.0)	4 (16.7)	8 (22.2)
Total	3(100.0)	3(100.0)	6(100.0)	24(100.0)	36(100.0)

Source: Survey data; Note: Percentages are given in parentheses

Two-thirds of the independent assembly line units produce only undergarments whereas the remaining units produce mixed items such as shirts, pants, and kids' garments. Among the registered units, 33.3 per cent concentrate in the production of ladies' garments, 16.7 per cent of gents' garments and the remaining 50 per cent of mixed items. A variety of garment items are produced in the unregistered units: 54.2 per cent produce ladies' garments, 12.5 per cent specialise in gents' garments, and 16.7 per cent each in kids' garments and mixed items.

Marketing

The entire production of CEPZ units is exported. The products of assembly line units are mostly exported; only a few items are sold at the local market. These exporting units have contacts with MNCs with which they have entered into trade agreements. The major share of the products of registered and unregistered units, is supplied directly to wholesale dealers and indirectly through their agents on contract basis. Under the contracting and subcontracting

system, the workers do not have to encounter problems of marketing the goods. Marketing is a serious problem in about half the number of registered units and two-thirds of the number of unregistered units. The remaining units sell their products at different shops including their own and face problems of marketing (Table 2.5).

Table 2.5 Distribution of Units according to Type of Marketing

Place of marketing	CEPZ	Assembly	Registered	Unregistered	Total
Export to foreign Countries	3 (100.0)	2 (66.7)	—	—	5 (13.9)
sales at local market & shops	—	1(33.3)	3 (50.0)	8 (33.3)	12 (33.3)
Supply to big shops	—	—	1(16.7)	10 (41.7)	11 (30.6)
Supply to Contractors	—	—	2 (33.3)	6 (25.0)	8 (22.2)
Total	3(100.0)	3(100.0)	6(100.0)	24(100.0)	36(100.0)

Source: Survey data; Note: percentages are given in parentheses

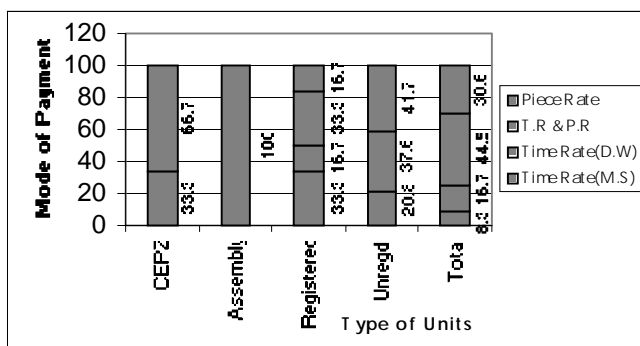
Wage Payment

Three forms of wage payments prevail in the garment units: time-rate, time-cum-piece rate, and piece-rate. Differential piece-rate payment system is followed in unregistered units in which wages are paid according to the discretion of the employers.

Piece-rate and Time-rate

One-third of the CEPZ units and all the registered units pay time-rate wages on a monthly basis. In this CEPZ units, where the number of workers are comparatively small, workers receive wages on time-rate but women working as machine operators, have to fulfil a production target also, to become eligible for the payment. Besides time-rate, time-cum-piece rate system is practised in two-thirds of the CEPZ units. These units insist on the workers to produce a specific number of products within a given period. The types of payment in the garment units are indicated in Figure 2.2.

Figure 2.2 Mode of Payment in the Units



Source: Computed by the researcher from the primary data; Note: T.R & P.R = Time-cum-piece rate, D.W = Day wage, M.S = Monthly salary.

Two types of time-rate wage exist in the units: monthly wages and daily wages. One-sixth of the registered units and one-fifth of the unregistered units follow the daily wage system. Payment is not made for days of absence. Time-cum-piece rate is the main form of wage payment practised in all types of units including assembly line units. Under this form, while workers are paid time-rate wages, they have to satisfy the assigned production target also. Altogether, 44.5 per cent of the units follow this form of wage payment under which workers are exploited ruthlessly.

Pure piece-rate payment is made in 16.7 per cent of the registered units and 41.7 per cent of the unregistered units. As a whole, 30.6 per cent of the garment units make piece-rate payment.

Overtime

For workers of CEPZ and assembly line units, overtime is compulsory whereas it is optional in most of the unregistered units. In one CEPZ unit, where the number of workers is the largest among the units, compulsory overtime work is practised on all days including Sundays; from 7 am to 8 am and 5 pm to 7 pm on working days and 7 am to 5 pm on Sundays. In another CEPZ unit, overtime work is imposed on all working days from 7 am to 8 am and 5 pm to 7 pm leaving Sundays free.

In all the assembly line and 33.3 per cent of the registered units, overtime work is compulsory for workers during the peak season. However, in the unregistered units, to undertake it according to their own choice.

None of the CEPZ units pays higher than regular wage rates for overtime work. In two assembly line units and one registered unit, one-and-a-half the usual wage rate is given. In all the remaining units (ie 19 out of 22 units practising overtime), the wage rate for overtime is the same as that for regular working time.

Bonus, Leave, and Other Facilities

Among the CEPZ units, payment of bonus and other allowances to workers is practised only in two units. One-fifth of the monthly wages is given as annual bonus, which is paid in two installments ie at *Onam* and Christmas. The same is the practice in two of the assembly line units, one registered unit, and three unregistered units. In one assembly line unit and one registered unit, only 10 per cent of monthly salary is given as bonus.

One-third of the unregistered units pay amounts in the range of Rs 500 to Rs 400 annually as bonus during the festival, *Onam* or Christmas season, the amount being decided by the employer calculated on the basis of his/her profitability. In some units, bonus is given not in cash but in kind ie in the form of products of the respective units. There is no bonus facility in one CEPZ unit, two registered units, and six unregistered units. Table 2.6 shows the details regarding the payment of bonus and allowances in the different units.

Table 2.6 Distribution of units according to Provision for Payment of Bonus / other Benefits

Type of bonus	CEPZ	Assembly	Registered	Unregistered	Total
20% of salary	2 (66.7)	2(66.7)	1(16.7)	3(12.5)	8(22.2)
10% of salary	—	1(33.3)	1(16.7)	—	2(5.6)
Rs.200	—	—	—	5(20.8)	5(13.9)
Less than Rs.200	—	—	—	3 (12.5)	3 (8.3)
In Kind	—	—	2((33.3)	7 (29.2)	9(25.0)
No bonus	1 (33.3)	—	2((33.3)	6 (25.0)	9 (25.0)
Total	3(100.0)	3(100.0)	6 (100.0)	24(100.0)	36(100.0)

Source: Survey data

Note: Percentages are given in parentheses

Two CEPZ units and one assembly line unit implement ‘Attendance Bonus Scheme’ for the workers. Under this scheme, workers become eligible for bonus only if they perform their regular and overtime work punctually and efficiently.

According to regulations, all Sundays and public holidays are to be treated as holidays for workers in CEPZ units. They should also be eligible for one casual leave per month. However, one-third of the units grant these facilities and that too on the condition that the workers would compulsorily do overtime work even on Sundays and other holidays. Another CEPZ unit provides leave on Saturdays and Sundays; in the third unit, even Sundays are working days. More than half the women workers in the CEPZ units do not enjoy freedom to take leave for emergency purposes and even leave on loss of wages. Only in one unit, the assembly line unit and one registered unit, workers are given leave on all Sundays and public holidays. In other assembly line units, only Sunday is treated as holiday (Table 2.7).

Table 2.7 Distribution of Units according to Conditions of Leave

Holidays and Leave	CEPZ	Assembly	Registered	Unregistered	Total
Sundays & public holidays; 12 days of casual leave	1(33.3)	—	—	—	1(2.8)
Sundays & Public holidays	—	1 (33.3)	1(16.7)	—	2(5.6)
Saturdays & Sundays	1(33.3)	—	—	—	1(2.8)
Only Sundays	—	2 (66.7)	—	—	2(5.6)
No holiday on Sunday	1(33.3)	—	—	10 (41.7)	11(30.6)
No holiday and no leave with pay	—	—	5 (83.3)	14 (58.3)	19(52.8)
Total	3(100)	3(100)	6(100)	24 (100)	36(100)

Source: Survey data; Survey data; Note: Percentages are given in parentheses

In most of the registered and unregistered units, the question of leave does not arise because the workers are paid piece-rate wages and they have to who undertake overtime work according to directions of employers. The policy of ‘no-work-no-pay’ is followed in these units. Loans and advances are provided to workers in one-third of the assembly line, the registered units and the unregistered units in times of emergency and recovered in instalment from their wages. This facility has created a cordial relationship between employers and employees, a situation absent conspicuously in the CEPZ units.

One CEPZ unit provides morning and evening tea besides free lunch to all its workers. These are given in the unit in which overtime work on all Weekdays and work on Sundays is compulsory.

These facilities attract workers to this unit irrespective of its rigorous work regime. Free morning and evening tea is provided to workers in two-thirds of the CEPZ units, one-third of the assembly line units, one-sixth of the registered units, and three-eighths of the unregistered units. Evening tea is given in one-third of the assembly line units, one-third of the registered and half of the unregistered units. Thus, we find that unregistered units are far more liberal than others in the matter of providing refreshment facilities to workers.

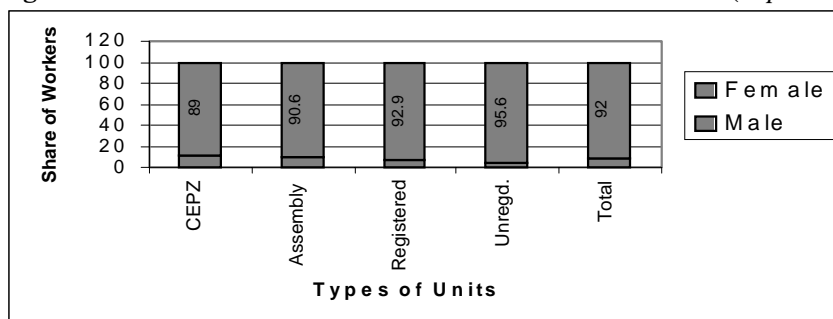
3. Characteristics of the Workforce

In this section, we discuss the demographic and socio-economic characteristics of the workers in the garment producing units.

Demographic Characteristics

Women outnumber men in all the garment-producing units; there are also units without male workers at all. While men work in all the CEPZ and Assembly line units in the sample, they are found only in one-third of the registered and one-eighth of the unregistered units. Thus, garment producing is predominantly a feminine-intensive industry par excellence (Figure 3.1).

Figure 3.1 Shares of Males and Females in Garment Units (in percentage)



Source: Computed by the Researcher from primary data

In the CEPZ units, workers in our sample constitute 11 per cent males and 89 per cent females. In all the other units, the proportion of women is more than 90 per cent: 90.6 per cent in assembly line units, 92.9 per cent in the registered units, and 95.6 per cent in the unregistered units. For the sample as a whole, women form 92 per cent.

Usually, employers prefer women workers in this industry as they are available for lower wages; can be employed on more flexible working terms and can be put to work for longer hours than men. They are less involved in union activities and strikes too. Another advantage of employing women labourers is that there is the possibility of turn over of the labour force, as most of them are retrenched from work on getting married. Thus, the mode of recruitment is also found to increase the degree of feminine intensity of the industry.

Workers of the garment industry belong mostly to the young age group, of below 30 years. An exception is noticed only in the case of male workers, particularly of unregistered units. It was found that 70 per cent of men and about 86 per cent of women workers are less than 30 years of age. The preponderance of young workers is the highest in the CEPZ units: 82 per cent among men and 92 per cent among women (Table 3.1).

Table 3.1 Percentage Distribution of Workers according to Category of Unit, Age, and Sex

Units Age	CEPZ		Registered		Unreg:		Total	
	M	F	M	F	M	F	M	F
Below 20	—	14.6	—	10.9	—	11.8	—	12.6
20-24	63.6	56.2	40.0	41.8	—	37.2	45.0	45.6
25-30	18.2	21.4	20.0	36.4	50.0	27.9	25.0	27.4
31-35	—	5.6	20.0	7.3	—	12.7	5.0	8.7
Above 35	18.2	2.2	20.0	3.6	50.0	10.4	25.0	5.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Survey Data

Marital Status

The proportion of the unmarried among women is more than three-fourth; it is four-fifth or more in the CEPZ and the registered units (Table 3.2).

The proportion of unmarried women comes to 55 per cent; 60 per cent or more in the CEPZ and the registered units. It is noticed that 6 per cent of the women workers are widowed while no male worker belongs to this category.

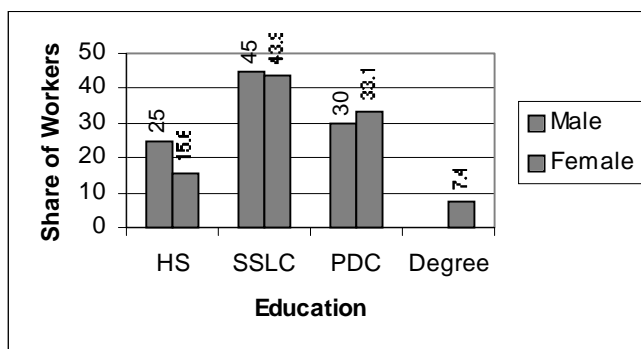
Educational Status

All men and women workers of the garment industry are literate; however, and surprisingly, women are found more educated than men are. Figure 3.2 shows the higher status of women at all levels of education.

Table 3.2 Distribution of Respondents according to Sex and Marital Status

Marital Status	CEPZ		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F
Not married	7 (63.6)	75 (84.2)	3 (60.0)	44 (80.0)	1 (25.0)	55 (64.0)	11 (55.0)	174 (75.6)
Married	4 (36.4)	11 (12.4)	2 (40.0)	8 (14.5)	3 (75.0)	23 (26.7)	9 (45.0)	42 (18.3)
Div/ Sep./ Widowed	—	3 (3.4)	—	3 (5.5)	—	8 (9.3)	—	14 (6.1)
Total	11 (100)	89 (100)	5 (100)	55 (100)	4 (100)	86 (100)	20 (100)	230 (100)

Source: Survey Data; Percentages are given in parentheses

Figure 3.2. Educational Status of Workers by Sex

Source: Computed by the researcher from the primary data.

It was found that workers with college education constituted 30 per cent of males and 37.4 per cent of females. Again, 7.4 per cent of women were graduates and postgraduates whereas none of the males was graduates. Educational qualification has not, however, been considered a criterion in determining occupational status of women in this industry.

Religious Composition

Workers of garment producing units belong to all communities ie 35 per cent are Hindus, 28 per cent are Christians, 19 per cent Muslims, and the remaining 18 per cent Scheduled Castes. Workers belonging to SCs are seen mostly in the CEPZ units. They come from distant rural places.

Mobility

Inter-generational, occupational, and spatial mobility of workers is considered. It is found

that more than two-thirds of the workers (men and women) in the export-oriented units, particularly in the CEPZ units, have come from distant rural areas (such as Idukki, Neriamangalam, Adimali, and Mundakkayam). More than three-fourths of the workers of CEPZ units belongs to this category. In the assembly line units, around half the number of workers are of rural areas. In the registered and unregistered units, the proportion of rural workers constitutes 32 per cent and 29 per cent respectively. Thus, the proportion of immigrant workers from rural area constitutes 50.4 per cent.

Garment-producing industry, particularly the relatively large exporting companies have been a big attraction for employment seekers from the rural areas. Women have found entry into this industry easier than entry into other jobs. The attraction of being a company worker in a metropolitan city has been a 'pull' factor for the workers of rural origin. Some workers have opted for work in this industry because of its non-insistence on educational qualifications.

Young women in most households in these areas practise garment making. In the units under study, we have observed several cases in which more than one member of a household work in the same unit. In the registered and the unregistered units, about one-fifth to one-fourth of the women workers reported that two or more women members of these households are also employed in this industry. In the units that operate in the houses of workers, all adult women of the household participate in the process. This is particularly so in the relatively poor households.

Occupational Mobility of Workers

Intergenerational Mobility

Most of the workers had come from agricultural households in which their parents had been farm workers. Others came from households formerly engaged in industries (such as bamboo and rattan weaving and basket making, coir-making, cashew processing) construction work, petty trade, and domestic services.

Of the 250 women workers, only 2 per cent had parents who had been in garment making. Ninety-eight per cent was first generation workers. Around 22 per cent of them are the first generation of women who have chosen to work in places away from their households for making a living. Thus, we find that intergenerational and occupational mobility is high among the workers in this industry.

Literacy levels for both men and women in Kerala are the highest among the States in India. In the case of unemployment also, that too far both the sexes, Kerala stands foremost. Unemployment is the factor which has 'pushed' women to the job market. Education has worked as a deterrent to taking physical labour in agriculture.

Moreover, work opportunities in that sector have been steadily on the decline. Poverty has been another 'push' factor. The garment fascinates women employment seekers since it is 'modern', urban, and clean and confers a status higher than that provided by 'unclean' occupations.

Inter-occupational Mobility

The majority of the women workers (71 per cent) began their career in this industry; for 55 per cent of the men workers also, it is the industry that gave them their first jobs.

Only 10 per cent of the respondents (men and women) had been employed such as in coir, bamboo, and cashew industries before entry into garment making. For instance, some of them had been cashew workers of Kollam and coir workers of Alappuzha and Vaikom. It is observed that 25 per cent of the men workers and 15.2 per cent of women workers had moved into garment-making industry after short spells of employment as nursery teachers, sales persons, accountants, typists, and workshop assistants. Thus, we find that mobility into this industry has not been exclusively from lower status jobs.

The respondents had come to know of the job opportunities in the CPEZ units through notifications in newspapers. In response to such notifications, girls came in flocks from some localities for interview and possible absorption into low levels of employment. By and large, the liberalisation policies have made a great positive impact upon the lives of large number of workers particularly, women workers in modern industries.

Occupational Choice

The opinions of the respondents about the favourable and unfavourable aspects of their present job as perceived by the upcoming generation in their households are classified in Table 3.3.

Table 3.3 Perception of the Present Job Status of the Respondents by Young Members of the Households

Reasons	CEPZ		Registered		Unregistered		Total	
Favourable Aspects	M	F	M	F	M	F	M	F
Easy to get	9.1	9.0	—	3.6	—	14.0	5.0	9.6
Better than earlier job	—	15.7	—	14.6	—	11.6	—	13.9
Regular income	18.2	18.0	20.0	16.4	—	19.8	15.0	18.3
Better than a servant's status	9.1	6.8	—	3.6	—	5.8	5.0	5.6
Total % favour	36.4	49.5	20.0	38.2	—	51.2	25.0	47.4
Unfavourable Aspects								
Lower salary than in earlier jobs	27.2	13.5	40.0	21.7	—	4.7	25.0	12.2
Hard work	18.2	20.2	20.0	14.6	25.0	14.0	20.0	16.5
Monotonous work	18.2	10.1	—	10.9	25.0	8.1	15.0	9.6
No Job security	—	4.5	—	7.3	—	4.6	—	5.2
Low status	—	2.3	20.0	7.3	50.0	17.4	15.0	9.1
Total % unfavoured	63.6	50.6	80.0	61.8	100	48.8	75.0	52.6
Grand Total	100	100	100	100	100	100	100	100

Source: Survey data

Twenty-five per cent of the men workers and 47 per cent of the women workers hope their present job would be acceptable to their youngsters. Forty-eight per cent of workers of the CEPZ, 37 per cent of the registered units, and 49 per cent of the unregistered units also expressed such a hope. The relatively higher degree of freedom the CEPZ units are special reasons mentioned for the expected performance.

Simultaneously, it was noticed, however, that 75 per cent of the men workers and 53 per cent of the women workers did not want their jobs to be taken up by their youngsters. That more than 50 per cent of the workers do not consider their jobs as suitable for their children reflects their dissatisfaction with their jobs. Most of them looked forward to better status jobs for their children, which they are to secure for them by providing good educational facilities.

Economic Status of Workers

We have looked into the economic status of the workforce, in terms of variables such as land ownership, housing, and household income.

Land

Out of the total sample, 18.8 per cent do not possess any land; however, in the unregistered units, the proportion of the landless is higher, almost one-third. Around one-third of the total sample had only less than 5 cents of land and only 5.6 per cent possessed more than one. In this regard, workers of CEPZ units had a higher share. In general, workers in garment units are land poor (Table 3.4).

Table 3.4 Extent of Land Possessed by Households of Garment Workers by Category of Units
(in percentage)

Possession of Land	CEPZ	Assembly	Registered	Unregistered	Total
No land	6.0	12.5	25.0	33.3	18.8
< 5 cents	20.0	46.8	39.2	41.1	33.2
6 - 10 cents	11.0	28.1	25.0	15.5	16.4
11 -20 cents	14	6.3	3.6	5.5	8.8
21 -50 cents	22.0	—	—	1.1	9.2
51 - 100 cents	14.0	6.3	3.6	3.3	8.0
1 - 2 acres	6.0	—	3.6	—	2.8
2 - 5 acres	7	—	—	—	2.8
Total	100.0	100.0	100.0	100.0	100.0

Source: Survey data

Households of workers with less than 20 cents of land did not receive any property income. Households that had one acre of land or more earned Rs 1,000-Rs 1,500 per

year. In our sample, workers of CEPZ units were found to possess on the average a larger area of land than their counterparts in other units did. That did not mean, however, that they belonged a higher economic stratum than the others. In fact, the reverse was the case.

Housing

In the sample, 70 per cent of men's and 76 per cent of women's households owned houses. The remaining men and 15 per cent of women live with relatives. The proportion of women workers living with relatives came to about 8 per cent; a few of them (1.3 per cent) lived on huts constructed on common property (*poromboke*) lands by the roadside.

Table 3.5 shows the type of housing facilities of the workers' households. Women workers had poor housing facilities compared to those of men. While only 10 per cent of male workers lived in thatched houses, the corresponding proportion of female workers was 23 per cent.

Table 3.5 Percentage Distribution of Workers by Type of House

Type of House	CEPZ		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F
Tiled	45.5	39.2	60.0	45.5	50.0	34.9	50.0	39.1
Concreted	18.2	11.2	20.0	32.7	25.0	17.4	20.0	18.7
Asbestos	18.2	18.4	20.0	7.3	25.0	27.9	20.0	19.1
Thatched	18.2	31.3	—	14.5	—	19.8	10.0	23.1
Total number	11	89	5	55	4	86	20	230
Percentage	100	100	100	100	100	100	100	100

Source: Survey data

Among the 250 workers, 71 per cent lived in nuclear families and the average number of members per household came to 6.1 in CEPZ units, 4-8 in registered units and 5.1 in unregistered units.

It is further observed that 28 per cent of the worker households are female-headed; 28 per cent in CPEZ units, 21.5 per cent in registered units, and 28.5 per cent in unregistered units.

Income

Only 2 per cent of the workers in CPEZ units earn a monthly income of less than Rs 1,000. The income of the majority of the workers in the sample falls below Rs 4,000 per month. Income of the workers in assembly line units was the highest and in the unregistered units the lowest, workers in the assembly line units coming in between.

Table 3.6 gives information on the per capita income in the workers' households.

Table 3.6 Distribution of Workers' Households according to Monthly Per-capita Income

Per-capita	CEPZ	Assembly	Registered	Unregistered	Total
< Rs.400	13.0	3.1	14.3	8.9	10.4
Rs.401-700	62.0	40.5	53.6	57.8	56.8
Rs 701-1000	17.0	31.3	17.8	26.6	22.4
Rs.1001-1500	8.0	25.1	14.3	6.7	10.4
Total	100	100	100	100	100

Source: Survey data

The monthly per capita income of about one-tenth of the households is less than Rs 400. Nearly 80 per cent have per capita incomes in the range of Rs 401–Rs 1,000. About one-fourth of the households of workers in the assembly line units have per capita incomes above Rs 1,000 per month. Thus, it is observed that households of workers in the garment industry have, in general, a relatively high-income status.

4. Labour Market Conditions in Garment Industry

In this section, we discuss the patterns and differentials in employment of workers in the garment industry. The method of recruitment, employment status, working time and wage structure, and gender discrimination in jobs and wage are discussed here. Questions of gender discrimination in employment and wage determination are taken up for detailed analysis in the next section.

Mode of recruitment of workers

No specific conditions or norms are followed in these units for employing workers. In fact, the mode of recruitment is casual and informal, and no recruitment formalities are observed. Further, the workers do not have any security of employment even in the export-oriented or registered units.

In the CEPZ units, recruitment of workers is made from job seekers belonging to distant rural areas, who flock to these units in response to newspaper advertisements. Workers, who are recruited, most of them women, and employed as machine operators and helpers, are in general persons with no previous work experience and educational qualifications.

The splitting of the production process into minute and specific tasks facilitates simplification of the task assigned to individual workers. The practice of workers already employed bringing their kith and kin into these units as job seekers is also common. Only for the appointment of master cutters, the employers insist to have previous experience and expertise in the work.

In the registered and unregistered units, workers with some training in stitching and

cutting are usually employed. In some cases, new recruits are assigned lowly tasks such as thread cutting, buttoning, edge cutting etc as a sort of unpaid apprenticeship before absorbing them as paid workers. The apprentice period is usually for two months or less.

Labour Contracts

Since it is the contractors or the agents of big manufacturers and exporters who run most of the garment-producing units, they employ workers also on contract basis. Only 30 per cent of men and 12.5 per cent of the women are employed on a permanent basis. Even the workers appointed with permanent status, do not have any job security.

Absence from duty for a couple of days or any objection expressed in doing overtime work is sufficient reasons for dismissal. As the workers are recruited purely on an informal basis, they do not enjoy any feeling of job security.

Though some of the women consider themselves as permanent workers, they are not treated in any way different from the treatment meted out to casual/contract workers. This is quite evident from the casualness with which they are retrenched from work; the majority of the women workers live in constant fear of retrenchment and loss of job. Worker turnover of women is high due to their retrenchment on getting married. The distribution of permanent and contract workers is shown in the Table 4.1.

Table 4.1. Labour Status of Workers in the Garment Units *(in percentage)*

Type of workers Units	Contract		Permanent	
	Male	Female	Male	Female
CEPZ	45.4	75.3	54.6	24.7
Assembly line	100.0	100.0	—	—
Registered	100.0	73.1	—	26.9
Unregistered	100.0	100.0	—	—
Total	70.0	87.5	30.0	12.5

Source: Survey data

Job Segregation

A significant feature highlighted by the field survey is the occupational specificity of the workers. Most of the men workers were employed in the higher category tasks such as supervisors and cutters on time-rate wages whereas women workers were absorbed in the low category, low paying jobs on piece-rate wages.

The distribution of workers between higher category and lower category jobs in the different types of readymade garment making units is given in Table 4.2.

Table 4.2 Nature of Work of the Respondents in Different Types of Units

Units Type of work	CEPZ		Assembly		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F	M	F
A. Higher Category										
Cutting	27.6	3.4	66.6	3.5	50	11.5	50	9.3	40	6.5
Supervision	18.2	6.7	33.3	6.9	50	3.8	25	3.5	25	5.2
Checking	18.2	6.7	—	3.5	—	3.9	—	—	10	3.5
Sub Total	64.0	16.8	100	13.9	100	19.2	75.0	12.8	75.0	15.2
B. Lower Category										
Stitching	—	55.1	—	41.3	—	19.2	—	17.4	—	35.2
Embroidery	9.1	4.5	—	6.9	—	7.8	25	32.5	10	15.8
Ironing	18.2	2.3	—	10.3	—	3.9	—	4.7	10	4.5
Buttoning Labeling/	—	14.6	—	13.8	—	11.5	—	9.3	—	12.2
Packing	9.1	6.7	—	13.8	—	3.8	—	7.0	5	7.4
Sub Total	36.4	83.2	—	86.1	—	46.2	25.0	70.9	25	75.1
C. All Categories	—	—	—	—	—	34.6	—	16.8	—	10
Total	100	100	100	100	100	100	100	100	100	100

Source: Survey data Note: H.C- Higher category L.C – Lower category

Depending upon the pattern of production prevailing in a unit, the workers have to follow the guidelines prescribed by the employer. Wide differences exist the nature of work and the pattern of employment as between the export-oriented units and the other units. Large-scale production is possible in the assembly line production process, in the others, production takes place on a smaller scale.

In the CEPZ units, the production process consists of a large number of different activities and each activity is entrusted with a specific group of workers. Different sections of work such as checking of raw materials, pattern making, cutting, stitching, embroidery, padding, buttoning, labelling, thread cutting, final checking, ironing, packing, and sealing constitute the different activities. Only women are employed as machine operators, (ie in the task of stitching) and they have to work continuously for several hours without rest. After assessing their productivity, the employees fix a production target. Most of the males are employed in higher category jobs such as cutting and supervision. Women are employed also in activities such as buttoning, labelling, and packing.

In the assembly line units too, a similar type of division of labour is practised. The long chain of the production process enables speedy production. Men are employed exclusively in the cutting and supervising section while women are appointed as operators and helpers who are categorised as low category jobs.

Some differences are noticed in the nature of work as between the registered and the unregistered units (Table 4.2). We find that 34.6 per cent of women in the registered and 16.8 per cent of women in the unregistered units are engaged in the production of garments, each performing all the different activities of garment-making herself. In these units also, men perform cutting, supervision and embroidery works done with machines. Women, as helpers, perform lower jobs ie the works that need ‘nimble fingers’.

Irrespective of whether the units are export-oriented, registered or unregistered, men are engaged in high category works whereas women cluster in the low category, low paying, and monotonous jobs.

Gender-based division of labour and extreme division of labour ties down each worker to a single specific job. Even during the training period, they are brought only specific jobs and immediate tasks; no provision is made for learning the complete process. This form of ‘on-the-job-training’ has obviously led to frustration and monotony on the part of the workers. When retrenched, they find it difficult to take up any independent self-employment in the same profession. Thus, job specificity kills initiative, reduces employment prospects, and keeps wages down, particularly in the case of women workers.

Working Day and Overtime

In the CEPZ and assembly line units, the prescribed working time is from 8 am to 5 pm with a noon interval for lunch. In some registered units also, the same time schedule is practised. Nevertheless, in most of the units (both registered and unregistered), no specific time schedule is prescribed. In practice, however, the working time is much longer in all the units (Table 4.3).

Table 4.3 Distribution of Respondents According to Working Time (in percentage)

Sector & sex	CEPZ		Assembly		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F	M	F
Hrs./Day										
< 8 hrs.	—	—	—	—	—	—	—	6.9	—	2.5
8 – 9	18.2	23.6	33.3	48.3	100	34.6	—	17.4	25	25.7
9 – 10	45.4	22.5	66.7	51.7	—	50.0	50.0	32.6	45	33.1
10 - 11	18.2	25.8	—	—	—	15.4	50.0	30.3	20	23.0
11 -12	18.2	28.1	—	—	—	—	—	12.8	10	15.7
Total No	100	100	100	100	100	100	100	100	100	100

Source: Survey data

The majority of the workers are put to more than nine hours of work, some working even

up to 12 hours a day. In general, the working day is longer for women workers than for men workers, particularly in the CEPZ and the registered units (Table 4.4).

Table 4.4 Length of the Average Working Day by Gender

(in Hours and Minutes)

Units	CEPZ	Assembly	Registered	Unregistered	Total
Males	9.50	9.20	8.30	10.0	9.35
Females	10.20	9.25	9.12	9.40	9.46

Source: Survey Data

Overtime work is done in all the units; overtime may be either voluntary or compulsory. When overtime (OT) is voluntary, workers may either take it up or refuse. In the case of compulsory OT, the employers expect the workers to take it up; those who refuse it would do so at the risk of their jobs.

A welcome feature of the arrangements is that the new recruits in the CEPZ who are paid only Rs 350 month, an amount grossly inadequate for accommodation and subsistence in Ernakulam, find opportunity to do overtime work as a great relief. In the CEPZ units, 36.4 per cent of men and 54 per cent of women workers have compulsory overtime work on all working days and also on Sundays. Thus, in these units, overtime is almost routine and mandatory, except in one unit (Table 4.5).

Table 4.5 Distribution of Workers according to Nature of Overtime Work

(in percentage)

Units Nature	CEPZ		Assembly		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F	M	F
1. Comp.OT										
All days	36.4	53.9	—	—	—	—	—	5.8	20.0	23.0
Work days	45.5	22.5	—	51.3	—	7.7	—	5.8	25.0	20.9
Season	—	—	33.3	20.6	50.0	26.9	25.0	23.3	15.0	14.3
2. Vol.OT	—	—	33.3	10.4	50.0	42.3	25.0	51.2	15.0	23.2
3. No OT	18.2	23.6	33.3	17.7	—	23.1	50.0	14.0	25.0	18.6
Total	100	100	100	100	100	100	100	100	100	100

Source: Survey data

Note: Comp. O.T. = Compulsory overtime; Vol. . OT. = Voluntary overtime

In the assembly line units, 51.3 per cent of women accomplish overtime work per working day. In the registered and unregistered units, workers are undertaking extra work according to their discretion and hence, it is purely voluntary. However, during the busy season, employers insist that workers should take up extra work. Only during the busy season does OT become

compulsory in the registered units; during the slack season, it is purely voluntary. As payment in these units is made on a piece-rate basis, OT is voluntary; yet, some workers opt to do work for 11–13 hours a day. As a whole, 25 per cent of the male and 18.6 per cent of the female workers do not do overtime work.

Wage Structure

Just like differences in the nature of work in the unit, wage differences also exist. Even within the same unit, wages and wage payment bases differ.

Forms of Wage Payment

Three main forms of wage payment practised in the units are time rate, piece-rate, and time-cum-piece rate. In the CEPZ and assembly line units, time rate and time-cum-piece-rate are the major forms; almost two-thirds of the men workers are provided time rate wages; workers are given, in the majority of cases, a time-cum-piece rate. Payment to men workers is in the form of monthly salary, in the case of women, payment is tied with the fulfilment of specific production targets also.

While almost two-thirds of the men workers (65 per cent) get time-rate payment, only less than one-third (30 per cent) of the female workers get it. The gender disparity is the highest in the unregistered units (Table 4.6).

Table 4.6 Distribution of Respondents according to Nature of Wage

(in percentage)

Nature of Wage	CEPZ		Assembly		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F	M	F
Piece-rate	—	—	—	10.4	50.0	46.2	—	40.7	5.0	21.7
Time-rate	63.6	48.3	33.3	10.3	50.0	34.6	100	16.3	65.0	30.0
Piece-cum										
Time-rate	36.4	51.7	66.7	79.3	—	19.3	—	43.0	30.0	48.3
Total No	11	89	3	29	2	26	4	86	20	230
	100	100	100	100	100	100	100	100	100	100

Source: Survey data

Exploitation of workers is made possible by implementing the combination of piece and pure time-rates and this is the main form of wage payment in the export-oriented units. In the units which follow this form, a production target is fixed and the workers have to fulfil it; ie in a single day, a specific number of units have to be produced. In the registered and the unregistered units, this form of wage is given only for women employed as casual labourers on daily wage.

In the CEPZ units, time-rate and piece-cum-time-rate is equally important each accounting for 50 per cent; in ‘assembly line’ units, piece-cum-time rate is the most important (78 per

cent), in 'registered' units, piece-rate is followed in 78 per cent of the cases; in the 'registered' units, piece-rate is the important form accounting for 46 per cent; and in the unregistered units, it has a dominant place (accounting for 41 per cent).

Periodicity of Payment

The workers are given monthly or weekly payments. Monthly payment is made to all the workers of the CEPZ and assembly line units; it is the practice in 20 per cent of the registered and 12 per cent of the unregistered units. In the remaining units, (registered and unregistered), weekly payment is the practice followed. The output per worker per day is calculated for a week and payments are made at the end of the week.

Monthly Earnings

There are busy and slack seasons in the garment industry; earnings per month vary depending on the seasonality factor. In the case of workers getting bonus and other allowances, the total amount is averaged out for a month and added on the monthly wage payment for calculating average monthly earnings (Table 4.7).

Table 4.7 Monthly Earnings of Workers

(in percentage)

Units Amount	CEPZ		Assembly		Registered		Unregistered		Total	
	M	F	M	F	M	F	M	F	M	F
< 400	—	4.5	—	—	—	—	—	4.6	—	3.5
401-500	—	21.3	—	6.9	—	3.9	—	5.8	—	11.7
501-600	—	19.1	—	3.5	—	11.5	—	5.8	—	11.3
601-800	18.2	27.0	—	48.3	—	19.3	—	23.3	10	27.4
801-1000	36.4	12.4	33.3	31.1	—	23.1	—	27.9	25.0	21.7
1001-1200	18.2	12.4	—	33.3	—	19.2	—	13.9	10.0	13.5
1201-1500	9.1	2.3	33.3	—	—	7.7	—	11.6	10.0	6.1
1501-2000	9.1	1.2	—	—	50.0	15.4	75.0	7	25.0	4.8
> 2000	9.1	—	33.3	—	50.0	—	25	—	20.0	—
Total	100	100	100	100	100	100	100	100	100	100

Source: Survey data

Severe disparity exists in earnings as between males and females in all different types of units. As women are confined to the bottom rung of the occupational ladder, their earnings are the lowest too. Even for the same type of work, men are given higher remuneration. Very low wages are given to women workers, especially in CEPZ units. Workers' earnings are found to vary from less than Rs 400 to more than Rs 2,000. Earnings of less than Rs 400 accrue to 4.5 per cent of women workers in the CEPZ and the unregistered units. The

proportion of women workers who earn less than Rs 600 per month constitutes 45 per cent in CEPZ units, 10.4 per cent in the assembly line units, 15.4 per cent in the registered units, and 16.3 per cent in the registered units. None of the men workers belongs to these lower earning groups. In the higher earning groups, men predominate. Earnings of Rs 1,500-Rs 2,000 accrue to 25 per cent of the men workers and 4.8 per cent of the women workers. Twenty per cent of men workers have monthly earnings of more than Rs 2,000 but no women worker comes in this category. Thus, in the wage ladder, men enjoy a higher earning status than women do.

Under the piece-rate system, the rates for producing the different garment items are extremely low. The prevailing rates per piece are Rs 3 per women gown and Rs 6 per *churidhar*. The rates are raised by Re 1 per piece for better quality stitching. For cutting, the rate varies from Re 1-Rs 2 per piece. For embroidery works also, specific rates are fixed. For buttoning, thread-cutting, and similar hand works, the rates are fixed in the range of 50-75 per piece.

The average earning per worker in the sample comes to Rs 912 per month. Workers in the registered units had the highest earnings (Rs 1,134.0) and CEPZ units had the lowest (Rs 776.50). The average earnings of the assembly line units are estimated at Rs 866 and that of the unregistered units at Rs 1,010.25 (Table 4.8).

Table 4.8 Average Monthly Earnings of Workers by Gender

(in Rs)

Units	CEPZ	Assembly	Registered	Unregistered	Total
Males	1121	1955	2240	2125	1561
Females	739	738	1050	961	855
Total	776	866	1134	1010	912

Source: Survey Data

The gender disparity in wages in the different units may be expressed in terms of a ratio. The average earnings of men are estimated at Rs 1,561 and of women at Rs 855. The female-male wage ratio thus works out to 1.82.

Actual Wage and Expected Wage

An important aspect to be mentioned in this context is the wide gap between the wages that new entrants hope to receive and the wages they actually receive. Such a gap exists more in the case of workers in CEPZ units than those in new entrants, most of them coming from remote, rural areas, flock the CEPZ units in the hope of getting a monthly wages of Rs 1,000. However, on joining the units, they are treated as apprentices or trainees for the first six months and paid only at Rs 350 per month. This is an experience shared by both men and women workers.

Another aspect noticed is that most of the workers are not aware of the provision of the Minimum Wages Act. It is found that 18 per cent of male and 73 per cent of female workers in our sample are not aware of the Act.

Payment during ‘Training Period’

It is observed the trainees perform all the duties of regular workers during most of their training period of six months since training of one or two weeks is adequate for them to learn the work and operate the machines. More than three-fourths of the workers in the CEPZ units had, in fact, training for one or two weeks; and the corresponding proportion in assembly line units is slightly lower, 65 per cent.

This practice of using trainees for regular jobs fetches the employees to earn huge profits, particularly since the productivity is high for young workers .

Another form of exploitation is the payment of normal rates of wages for overtime work. The Factories Act, 1948 defines ‘overtime’ as follows: “Where a worker works in a factory for more than nine hours in any day or for more than 48 hours in any week, he shall, in respect of overtime work, be entitled to wages at the rate twice his ordinary rate of wages”. Among the workers in our sample who do overtime work, 53.3 per cent of the men and 81.3 per cent of the women get only the ordinary rate and the remaining get one-and-a-half times the ordinary rate. There are instances in which even wage payment at ordinary rate is denied to workers for overtime work.

Thus, overtime work imposed on workers constitutes another subtle method of exploitation by the garment units.

Living and Working Conditions

In the CEPZ units, 33 per cent of males and 77 per cent of females belong to distant places, but live in rented rooms of houses near the factory. Generally, 8 to 10 females share one room and each person pays Rs 100- Rs 150 as rent. Most of the people in the locality rent out at least one room each from their houses and earn an income of around Rs 1,000-1,500 per month. Toilet and other sanitary facilities are poor in the congested places in which they live.

The working conditions in the industrial units are poor. Workers do not have job security and are in constant fear of losing job. Two or three days’ unauthorised absence is often reason enough for dismissal. Late coming also invites the wrath of the employers and severe punishment in the form of wage cut. As overtime work on Sundays is compulsory, workers find it difficult to visit their homes for months together. Recreation facilities do not exist at all.

The working conditions in assembly line units are better than those in the CEPZ units. In

certain registered and unregistered units, the workers enjoy free refreshment facilities; they also have group prayers and festivals. However, those who work in the houses of employers are a dissatisfied lot with scanty working facilities and little opportunity for entertainment or group interaction.

Occupational hazards in the form of work-related diseases are not uncommon. Health hazards are the most severe among the women workers of the CEPZ units; more than 75 per cent of them fall in this category. The usual health problems are back pain, shoulder pain, headache, sneezing, allergy, asthma, and chest pain. Long hours of strenuous work without rest causes diseases particularly during peak seasons. It is found that about two-fifths of the men workers in CEPZ and unregistered units suffer from health problems.

Unionisation

Trade union activities are not common among the workers of garment manufacturing units. In the CEPZ units, union activities are strictly prohibited. None of the workers in these units is a member of any union. In the assembly line units, only very few of the workers are members, and that too only males. Though 50 per cent of men had union membership in the unregistered units, they do not have active involvement; in the registered units, none of the workers is a union member.

However, a few workers, about 12 per cent of the sample, are members of All Kerala Tailoring Workers Union and contribute Rs 10 per person per month as membership fee. It is understood that these contributions would entitle them to a lump sum return at the retiring age of 55 years. Except for this, no effort was found on the part of the workers or any of the trade unions to bring garment workers under a common flag to enable them to bargain for their rights. On the part of the workers, particularly among the women, many are totally unaware of the benefits of becoming trade union members. Others, who are aware, are scared of becoming members for fear of expulsion from jobs. While some of them stated that they have little time to participate in union membership. However, there was a small minority among them that believe in the positive results which unionisation might bring to them.

5. Gender Discrimination in Garment Industry

Gender discrimination means unfavourable treatment based on prejudice regarding sex. In economic terms, gender discrimination is of two types, occupational and wage, related. If women are excluded from high level jobs, discrimination is of the first type. If men and women do the same job and women are paid less, it is of the second type. Both forms of discrimination are found in the garment industry.

Occupational Discrimination

In most cases, gender discrimination in occupation starts from the premises that there are jobs suitable for men and jobs suitable for women and that they are different. Division of jobs

into these two categories could take two forms: Vertical and horizontal. Both the types exist in the garment industry.

Vertical exists when men are assigned jobs at the top of the occupational ladder and women cluster at the bottom or in the lower grades. While men initially assigned lower position have opportunities of rising in the occupational ladder, such opportunities are denied, in general, to women.

In fact, they often slide down in the occupational ladder due to victimisation by employers. In our study, upward mobility or promotion seems to have been enjoyed by 50 per cent of men as compared to only 12.1 per cent of women.

Both feminine intensity and gender-based occupational specificity exist in the garment industry. In fact, occupational specificity had led to marginalisation of women. The Female Marginalisation Thesis is relevant in the context of garment industry in Kerala (Varghese, N.V.IJLE: 203-209).

In our sample, it is found that men are employed in the higher category jobs such as cutting (40 per cent), supervising (25 per cent), and checking (10 per cent) and women work in the lower category jobs such as stitching (45.2 per cent), labelling, packing, and helping (20 per cent). Moreover, this is so despite the fact that women workers of our sample are more educated.

Horizontal division is another important form of gender discrimination existing in the labour market, particularly in the unorganised manufacturing sector. When women and men are recruited to different types of jobs on gender basis, it is a case of horizontal segregation. Jobs are stereotyped as men's jobs and women's jobs. Such stereotypes are found to exist in the garment industry. Job discrimination on gender basis is most pronounced in the export-oriented units.

Our findings are in conformity with the conclusions of the several studies on the topic made in India. Gender discrimination practised in the unorganised sector was noticed by Agarwal (1992), Banerjee (1988, 1991), Baud (1991), Dholaki (1990), Ela Bhatt (1987), Husain (1991), Kalpagam (1993), Kulkarni (1993), Kumud Pore (1991), Nigam (1992), and Shaw (1994); it is found to be higher in the feminine intensive industries.

Wage Discrimination

The principle of 'equal pay for equal work' does not countenance differentials in wage on the ground of sex. Discrimination in wages is rampant in garment industry. While about two-thirds of the male workers in our sample received more than Rs 1,000 per month (of which 20 per cent had more than Rs 2,000 per month), the proportion of women with more than Rs 1,000 per month was less than one-fourth and none of them received more than Rs 2,000 per month. In fact, one-fourth of the women workers in

our sample earned only less than Rs 600 per month; no male worker belonged to this low category.

Women are paid lower wages than men are for the same tasks performed. This wage disparity between men and women with 'equal skill, effort, and responsibility under similar working conditions' is evidence of the severe gender discrimination in the industry. For the same type and amount of females, the earnings of females receive only 70 per cent of the male earnings. In the cutting section, in CEPZ and assembly line units men are given Rs 2,000-Rs 2,400, while women are paid only Rs 1,500-Rs 1,800 per month. In the checking and supervising sections, the payment for men varies between Rs 1,300-Rs 1,600 and for of women the range is Rs 1,000-Rs 1,200 per month.

Discrimination by gender in the mode of payment is also severe. While 65 per cent of men get time-rate payment and non-wage benefits, only 30 per cent of women get them. Of the women who get, 10 per cent are paid on day-wage basis. Differences exist also in the mode of increment, assignment of overtime work, etc. Overtime work is assigned more to women; for example, 27 per cent do overtime work of 2-4 hours per working day and on Sundays. Nevertheless, no men do work on Sundays or work overtime for more than two hours on working days.

It appears that the process of feminisation with its attendant lowering of status is at work in this industry (Banerjee 1994: 218). Women workers are quite conscious of the discrimination meted out them but acquiesce in it due to problems of mobility and lack of alternative employment opportunities.

Gender Discrimination in Other Aspects

Gender discrimination prevails not only in work and wages in the industry but at home as well. In our sample, men workers reported that they never performed any household work; the corresponding proportion among women workers was only 0.9 per cent. 45 per cent of the male and 14 per cent of the female workers performs household work for about an hour per day. More than one-fifth of women workers spends more than four hours per day on household chores. Table 5.1 presents a comparison between males and females with respect to their time disposition (among work in the industrial unit, household work, leisure, and income and savings).

The monthly income of males (Rs 1,561) is found to be much higher than that of females (Rs 855) while the average work time of males (9.35) is lower than that of females (9.41 hours). Another aspect noticed is that male earnings are higher (Rs 2,280) in the households of male workers compared to households (Rs 1,595) of female workers. Interestingly, households of female workers have higher incomes (Rs 1,491) than households of male workers (Rs 852) indicating that female workers contribute more to their households than men workers do.

It is estimated that the average time spent for household work by males and females are 0.65

hours and 2.67 hours respectively. Disparity is noticed also in the time spent for leisure/ recreation. Males enjoy leisure on the average for 3.1 hours daily as against only 1.6 hours enjoyed by women. It is further observed that the proportion of men enjoying leisure is higher than of women among the workers in garment industry (Table 5.1).

Table 5.1 Time Disposition, Income and Savings of Workers according to Gender

Variables	Sex Mean	Arithmetic Deviation	Standard
Work Time (Hours/Day)	Male	9.3500	0.6708
	Female	9.4087	0.9382
Household work (Hours)	Male	0.6500	0.6708
	Female	2.6609	1.0439
Leisure (hours)	Male	3.1000	0.9119
	Female	1.6087	0.8379
Monthly income(Rupees)	Male	1561.5000	727.8033
	Female	855.6522	322.6301
Savings	Male	147.5000	132.2627
	Female	156.2391	127.9588
Total Male earnings of the household	Male	2280.0000	934.9078
	Female	1594.5870	1116.8163
Total Female earnings	Male	852.5000	637.5271
	Female	1481.0870	672.1765
Family Income	Male	3279.5000	1143.9186
	Female	3159.3696	1111.5286
Per capita income	Male	691.3500	283.6401
	Female	644.4304	235.9664

6. Summary of Findings and Conclusion

Garment making is a fast developing industry reckoned in terms of the number of industrial units, employment, and foreign exchange earnings. It is considered as an emerging industry with immense potential for growth.

Units

There are about 50,000 garment-producing units in India. This industry is mostly unorganised; 85 per cent of the garment units belongs to this category. The textile and garment industry accounts for about 25 per cent of the value of industrial production in India.

In Kerala, there exist more than 2,000 registered garment-producing units. Besides them, large number of unregistered units also function in the State. Rapid increase is noticed in the number of garment units in Kerala since 1990.

About 15 million people are employed in the garment industry in India and it is the largest employer in the private sector; a peculiar feature of this industry its feminine intensity. Women constitute more than 90 per cent of its labour force.

Four lakh workers are newly employed in the organised sector of this industry in Kerala. There are, besides, several lakh working in unregistered units.

In terms of value and share in the total value of export, the garment industry occupies a significant place. It has registered rapid increase in recent years. From a meagre value of Rs 1 crore in 1960, the export value of garment items from India increased to Rs 29 crore in 1970, to Rs 550 crore in 1980, Rs 4,042 crore in 1990 and to Rs 13,295 crore in 1996-'97. With regard to its proportion to the total value of exports, the increase was from 0.15 per cent in 1960 to 1.9 per cent in 1970, to 8.2 per cent in 1980, to 12.4 per cent in 1990, and to 15 per cent in 1996-97. Garments were the third highest item of exports, next only to handicrafts, and gems and jewellery.

Ernakulam occupies the top position in respect of the number and proportion of garment-producing units in the State. The establishment of thousands of garment-producing units in the district has changed its industrial profile. The starting of the EPZ in Ernakulam by acquiring 210 acres of land at Kakkanad for establishing an industrial complex was a major landmark. The EPZ has attracted thousands of rural workers to the area. A number of households have their women employed in this emerging industry.

Garment products constitute the main item of production in the different Export Processing Zones (EPZs) in India. The EPZ units established at Cochin also undertake production of a variety of garment items intended solely for exports. Besides CEPZ units, there exist also industrial units operating with the assembly line production process and producing both for export and for local purposes. The owners of these units are mostly agents of multinationals who give the work on contract to sub-agents. Several other registered units are also operating in the area and they supply their wares to the agents of exporters. Apart from these units, vast number of unregistered units function in the houses of employers. Production is carried out in the units in which the employer happens, in most cases, to be a sub-agent of an exporting company. Hence it is very difficult to draw a line between export-oriented units and units producing solely for local purposes. However, the CEPZ units and assembly line units are considered, in general, export-oriented while the registered and unregistered units are considered producers for the local market. Those units which undertake contract work for agents of exporters are not export-oriented. In fact, the workers in these units are unaware of the fact that a part of their production was exported.

The main characteristics of the workers are the following:

- (i) More than three-fourths of them is young and unmarried women; the proportion of women is the highest in the export-oriented units;
- (ii) All workers are literate but women workers are found more educated than their male

- counterparts;
- (iii) More than half the workers are suffering from different health problems, the intensity of which is severe among the workers of CEPZ units;
 - (iv) Almost three-fourths of the workers have own houses; the remaining live in rented buildings or houses built on public property land along the sides of highways;
 - (v) The average monthly per capita household income is the highest for workers of assembly line units and the lowest for workers of CEPZ units;
 - (vi) The average number of members in the households is higher for CEPZ workers, (6.1) followed by unregistered units (5.1), assembly line units (4.8), and in the registered units (4.5);
 - (vii) It is found that 28 per cent of the households are female-headed;

The units belonging to the unorganised sector are more feminine-intensive than others are. In the total sample, 92 per cent of the workers are females; in the unregistered units, their proportion forms 96 per cent. Nearly 88 per cent of the unregistered units had no male workers at all. In 20 per cent of the female workers' households, the average number of members engaged in garment production is more than two and in five per cent of households, there are more than five members.

In the export-oriented garment units in which the assembly line production process is carried out, males are employed in the higher category. Usually, women workers get instructions only for doing specific and immediate tasks; there is no provision for them for learning the whole process of the work. This form of work causes several problems for their rehabilitation once they lose their jobs in the units.

In the registered and unregistered units, one-third of the women is engaged in the production of garments performing all items of work from the beginning to the finish. Even in these units, occupational specificity and gender discrimination in the allotment of work is noticed. Compulsory overtime work had to be undertaken by three-fourths of the workers of CEPZ units in which women had to work almost 11-12 hours a day.

Discriminatory Practices in Wage Payment

Three types of payment are practised in the garment units: time rate, piece-rate, and time-cum-piece rate. While 65 per cent of men workers are given time-rate wages with other non-wage benefits, the majority of women workers are provided piece-cum-time rate wages.

In the registered and the unregistered units, piece-rate payment is the norm for women workers. The wide prevalence of piece-cum-time rate wages helps the employers to exploit the workers to the maximum possible. By fixing a production target within the stipulated time schedule, they manage to prolong working hours without increasing wage rates.

Wage Discrimination

Wage disparities between males and females are observed among the different industrial units

and some times even within a single unit. While more than one-fourth of the women workers receives less than Rs 600 per month, none of the males belong to this category. A monthly income of above Rs 2,000 is earned by 20 per cent of males, but by no females. On an average, wages of men workers come to Rs 1,561 per month and that of females to Rs 855 per month. Besides, for the same tasks performed, women workers receive wages only at 70 per cent of the rates received by men.

Occupational and Spatial Mobility

Forty-five per cent of the male and 30 per cent of the female workers have come from a rural background and occupations in agriculture, traditional industries, and domestic service. Interestingly, some of these earlier jobs had fetched them incomes higher than their wages in the garment industry. Intergenerational mobility is also in evidence among them. Almost all of them are first generation workers in the garment industry. Their parents had been agricultural or other manual workers. The CPEZ units have attracted workers since these units are considered 'exporting companies' located in a modern urban centre such as Ernakulam Corporation. In fact, women employed in the garment industry are of the view that their economic and social status has gone up.

Liberalisation and Structural Adjustment

The NEP package is bound to add multifarious dimensions and implications in the labour market and in the different industries. The setting up of the EPZs at different parts of India and the starting of different export-oriented industries in them have led to increased feminisation and casualisation of labour force. This is true in the Kerala case also.

The introduction of modern technology in the export-oriented units has brought serious changes in the pattern of employment of women in this industry.

Assembly Line Production and Segregation of Women Workers

Assembly line production is carried out in the export-oriented units in which men are employed in higher category jobs and women in lower category jobs. The putting-out system as practised in the big industrial complex of the CEPZ has led to widespread exploitation and marginalisation of women. Largely, the introduction of modern technology in the garment industry has not led to improvement of the workers' skill and caused a threat to their continuous employment.

Contracting and Subcontracting

The system of labour contracts is widespread in the different types of units of the garment industry. The multinationals and their agents manage and control many of the big garment-producing units. Most of the registered units have different sub-units, which are not registered, and the workers of the sub-units are employed on contract basis on low wages. Many unregistered units operate on a household basis on contract, producing for big shops and, as

subcontractors, producing for agents of exporters. Even the workers of registered and big assembly line units are mere contract workers who may be expelled at will. Job security is a thing unheard of in the garment industry, even for the so-called 'permanent' workers.

A major restructuring of industrial establishments has taken place in the garment-making resulting in changes in labour use patterns. A number of jobs that had been previously undertaken by regular permanent employees in the units have gone increasingly to contract workers employed in ancillary units. This process has increased the degree of participation of women in such units. The result has been the use of cheap flexible labour force and its large-scale feminisation and casualisation.

More than 90 per cent of the workers in our sample comprise women and many unregistered units have only women as workers. Producers tend to switch their production units from the organised to the unorganised sector. The workers of export-oriented assembly line units and registered units are considered to belong to the organised sector; they are totally insecure as far as their continuance in job is concerned. In fact, they are unorganised workers working in the organised sector.

Women are employed on contract basis under the piece-rate system in insecure working conditions. They work for long hours, say, up to 12 hours a day, particularly so in the EPZ units. Although the products command wide market both within and outside the country, these workers are not in any way profited. They are not paid any extra rate for overtime work, which is imposed on them as a daily routine. Differential wage payments are practised as between men and women workers even for the same work. By assigning specific parts of particular jobs, the employers keep these workers untrained and unskilled in a complete job - a device followed to restrict their moving away to other employers or areas.

Role of Women in Garment Industry

The workers of the garment industry in our sample belong to the unorganised category, they do not have security of tenure or safe working conditions. Acknowledging the overwhelming presence of women workers in the unorganised sectors, Scott observes that these sectors could be aptly called as the 'female sector'. According to Papola, about 90 per cent of the total workforce in India is in the unorganised sectors; women workers in them form a still higher proportion, about 97 per cent. Employment in the organised sector is a near-monopoly of men who account for 88 per cent of the workers in this sector. Estimates provided by the latest NSSO data indicate that 43 per cent of female workers are engaged in casual wage employment while the corresponding proportion of male workers is only 30 per cent.

Problems of Garment Producing units

Though the garment industry is growing rapidly throughout the length and breadth of the county, it faces a variety of problems. As already mentioned, around 85 per cent of the units

belong to the unorganised sector. Even in the units that come under the organised sector, workers are employed on contract/piece-rate basis; as unorganised workers employed within the organised sector framework.

The industry does not seem to have a perspective of planned development. Its growth has been in response to the increasing demand in the international and the local markets for readymade garments. India's share in the value of global garment exports remains less than 5 per cent despite the tremendous increase in garment exports. India faces severe competition from other garment exporting countries like Taiwan, Malaysia, China, Korea, Bangladesh, and Japan, which produce a larger variety of quality products.

In the interests of long-term growth, the Indian garment manufacturers have to delink themselves from the multinationals under which they now produce specific items of garments under a contract system. The present system would only perpetuate exploitation of the cheap labour conditions in the country.

The Government could think in terms of introducing some system in the present situation by bringing them together under a single regulatory authority, may be a Central Board, which could lay down rules and regulations regarding wage rates, working conditions, quality of products, terms of contract, etc.

In Kerala, the initiative taken by the employers have led to the formation of All Kerala Garment Manufacturers Association in 1996. The first annual meeting of the Association was held at Muvattupuzha recently and discussed the problems faced by the industry and requested the Government to raise the tax limit from the annual turnover of Rs 50 lakh. Considering the increasing cost of machines and equipment and increasing labour charges, the Association stated that it was finding it difficult to pay the heavy taxes imposed on the industry without affecting its efficiency and chances of survival.

No steps are in evidence till now on the part of trade unions to bring workers, working in units of different types which lie scattered over a wide area, under exploitative conditions, to a common fold and to strengthen their bargaining power.

Absence of adequate training facilities for the workers in this industry is a serious problem. Only in the metropolitan cities such as Delhi and Mumbai do Institutes of Fashion Technology function. In this regard, Kerala do not have any facilities at all. Workers of export-oriented units get some 'on-the-job-training' as they are employed in the assembly line units, of specific parts of particular operations.

Another pertinent problem is the absence of an appropriate wage policy in the garment producing units. No norms exist concerning wage fixation, wage rates, or other service benefits. Even in the registered units, wages are not given according to the norms prescribed by the Minimum Wages Act.

Non-availability of good quality fabrics and raw materials at reasonable prices is another

problem that faces the industry in Kerala. Most of the manufacturers have to purchase the raw materials from distant places such as Mumbai, Surat, and Ahmedabad. In the export-oriented units, the production costs tend to go high since it is the imported raw materials that are mainly used.

Given necessary organisational and professional efforts, supplemented by adequate governmental understanding and support, the garment industry of India has great growth prospects.

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