

WAGES IN BANGLADESH

A study of Tea estates, Ready Made Garment, Leather, and Construction

Kea Tijdens, Ahmed Adib, Daniela Ceccon,
Tahreen Chowdhury, Minhaj Mahmud, Gabriele Medas,
Paulien Osse, Maarten van Klaveren,



WageIndicator Foundation is a non-profit NGO. It develops, operates and owns national WageIndicator websites in 140 countries with labour-related content, using data from its WageIndicator Salary and Working Conditions Survey, Minimum Wages Database, Collective Agreement Database, Salary Checks and Calculations, DecentWorkChecks and related Labour Law Database, and Cost of Living Survey and resulting Living Wages Database. The mission of WageIndicator is to promote labor market transparency for the benefit of all employers, employees and workers worldwide by sharing and comparing information on wages, labor law and career. WageIndicator does so by making this information freely available on easy to reach and read national websites in the national language(s), using sophisticated search engine optimization. All websites are accessible through mobile phones. For Decent Wages in Bangladesh WageIndicator coordinated the project, adapted its Wages and Cost-of-Living surveys to the Bengali situation, disposed its survey software, analysed the data and contributed to the report.

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The Bangladesh Institute of Development Studies (BIDS) in Dhaka is an autonomous public multi-disciplinary organization which conducts policy-oriented research on development issues facing Bangladesh and other developing countries. The mission is to facilitate learning in development solutions by conducting credible research, fostering policy dialogue, disseminating policy options, and developing coalitions to promote informed policy making. The Institute also conducts training on research methodologies and carries out evaluation of development interventions. In that pursuit, BIDS is involved in collection and generation of socio-economic data for carrying out analytical and policy loaded research on

current economic and social issues and dissemination of research findings and knowledge on developmental concerns to support policy formulation. BIDS researchers also contribute directly to formulation of government policies through their interactions and participation in the policy-making process. For Decent Wages in Bangladesh BIDS researchers contributed to the surveys, implemented fieldwork for the Wages and the Cost-of-Living surveys, CBA annotations, and the report writing.

Funding

The project Decent Wage Bangladesh, Phase 1 was funded by Mondiaal FNV, as part of its Trade Union Cooperation Programme 2017 – 2020. Grant number NL0810131.

Acknowledgements

Many people contributed to the project Decent Wages in Bangladesh. BIDS acknowledges the contributions from Ahmed Adib, Tahreen Chowdhury and Minhaj Mahmud (management). WageIndicator acknowledges the contributions from Iftikhar Ahmad, Huub Bouma, Daniela Ceccon, Martin Guzi, Tomáš Kabina, Maarten van Klaveren, Gabriele Medas, Paulien Osse (management), Kea Tijdens, Giulia Prevedello.

Bibliographical information

Tijdens KG, Ahmed A, Ceccon D, Mahmud M, Medas G, Osse P, Van Klaveren M (2020) Wages in Bangladesh, A study of Tea estates, Ready Made Garment, Leather, and Construction. Amsterdam, WageIndicator Foundation, December.

This report is available online in English and Bengali, see <https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>

The Appendix to the report is online available, see:

<https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>

Appendix to Wages in Bangladesh, Sampling and fieldwork of the Wages and Work Survey 2020. Amsterdam, WageIndicator Foundation

<https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>

The data of the Wages and Work Survey 2020 Bangladesh and the related codebook are free available on request: k.g.tijdens@uva.nl.

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Email WageIndicator Foundation office@wageindicator.org

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MANAGEMENT SUMMARY

Decent Wage Bangladesh phase 1

The aims of the project Decent Wage Bangladesh phase 1 aimed to gain insight in actual wages, the cost of living and the collective labour agreements in four low-paid sectors in three regions of Bangladesh, in order to strengthen the power of trade unions. The project received funding from Mondiaal FNV in the Netherlands and seeks to contribute to the knowledge and research pathway of Mondiaal's theory of change related to social dialogue. Between August and November 2020 five studies have been undertaken. In a face-to-face survey on wages and work 1,894 workers have been interviewed. In a survey on the cost-of-living 19,252 prices have been observed. The content of 27 collective agreements have been analysed. Fifth, desk research regarding the four sectors was undertaken. The project was coordinated by WageIndicator Foundation, an NGO operating websites with information about work and wages in 140 countries, a wide network of correspondents and a track record in collecting and analysing data regarding wage patterns, cost of living, minimum wages and collective agreements. For this project WageIndicator collaborated with its partner Bangladesh Institute of Development Studies (BIDS) in Dhaka, with a track record in conducting surveys in the country and with whom a long-lasting relationship exists. Relevant information was posted on the WageIndicator Bangladesh website and visual graphics and photos on the project webpage. The results of the Cost-of-Living survey can be seen [here](#).

Ready Made Garment (RMG), Leather and footwear, Construction and Tea gardens and estates are the key sectors in the report. In the Wages and Work Survey interviews have been held with 724 RMG workers in 65 factories, 337 leather and footwear workers in 34

factories, 432 construction workers in several construction sites and 401 workers in 5 tea gardens and 15 tea estates. The Wages and Work Survey 2020 was conducted in the Chattogram, Dhaka and Sylhet Divisions.

Earnings have been measured in great detail. Monthly median wages for a standard working week are BDT 3,092 in tea gardens and estates, BDT 9,857 in Ready made garment, Bangladeshi Taka (BDT) 10,800 in leather and footwear and BDT 11,547 in construction. The females' median wage is 77% of males, reflecting the gender pay gap noticed around the world. The main reason is not that women and men are paid differently for the same work, but that men and women work in gender-segregated parts of the labour market. Women are dominating the low-paid work in the tea gardens and estates. Workers aged 40 and over are substantially lower paid than younger workers, and this can partly be ascribed to the presence of older women in the tea gardens and estates. Workers hired via an intermediary have higher median wages than workers with a permanent contract or without a contract. Seven in ten workers report that they receive an annual bonus. Almost three in ten workers report that they participate in a pension fund and this is remarkably high in the tea estates, thereby partly compensating the low wages in the sector. Participation in an unemployment fund, a disability fund or medical insurance is hardly observed, but entitlement to paid sick leave and access to medical facilities is frequently mentioned. Female workers participate more than males in all funds and facilities. Compared to workers in the other three sectors, workers in tea gardens and estates participate more in all funds apart from paid sick leave. Social security is almost absent in the construction sector. Does the employer provide non-monetary provisions such as food, housing, clothing, or transport? Food is reported by almost two in ten workers,

housing is also reported by more than three in ten workers, clothing by hardly any worker and transport by just over one in ten workers. Food and housing are substantially more often reported in the tea gardens and estates than in the other sectors. A third of the workers reports that overtime hours are paid as normal hours plus a premium, a third reports that overtime hours are paid as normal hours and another third reports that these extra hours are not paid. The latter is particularly the case in construction, although construction workers work long contractual hours they hardly have “overtime hours”, making not paying overtime hours not a major problem.

Living Wage calculations aim to indicate a wage level that allows families to lead decent lives. It represents an estimate of the monthly expenses necessary to cover the cost of food, housing, transportation, health, education, water, phone and clothing. The prices of 61 food items, housing and transportation have been collected by means of a Cost-of-Living Survey, resulting in 19,252 prices. In Chattagram the living wage for a typical family is BDT 13,000 for a full-time working adult. In Dhaka the living wage for a typical family is BDT 14,400 for a full-time working adult. In both regions the wages of the lowest paid quarter of the semi-skilled workers are only sufficient for the living wage level of a single adult, the wages of the middle paid quarter are sufficient for a single adult and a standard 2+2 family, and the wages in the highest paid quarter are sufficient for a single adult, a standard 2+2 family, and a typical family. In Sylhet the living wage for a typical family is BDT 16,800 for a full-time working adult. In Sylhet the wages of the semi-skilled workers are not sufficient for the living wage level of a single adult, let alone for a standard 2+2 family or a typical family. However, the reader should take into account that these earnings are primarily based on the wages in the tea gardens and estates, where employers provide non-monetary provisions such as housing and food. Nevertheless, the wages in Sylhet are not sufficient for a living wage.

Employment contracts. Whereas almost all workers in construction have no contract, in the leather industry workers have predominantly a permanent contract, specifically in Chattagram. In RMG the workers in Chattagram mostly have a permanent contract, whereas in Dhaka this is only the case for four in ten workers. RMG workers in Dhaka are in majority hired through a labour intermediary. Workers in the tea gardens and estates in Chattagram in majority have no contract, whereas in Sylhet they have in majority a permanent contract. On average the workers have eleven years of work experience. Almost half of the employees say they have been promoted in their current workplace.

COVID-19 Absenteeism from work was very high in the first months of the pandemic, when the government ordered a general lock down (closure) for all industries. Almost all workers in construction, RMG and leather reported that they were absent from work from late March to late May 2020. Female workers were far less absent than male workers, and this is primarily due to the fact that the tea gardens and estates with their highly female workforce did not close. From 77% in March-May absenteeism tremendously dropped till 5% in June-September. By September the number of absent days had dropped to almost zero in all sectors. Absenteeism was predominantly due to workplace closures, but in some cases due to the unavailability of transport. More than eight all absent workers faced a wage reduction. Wage reduction has been applied equally across the various groups of workers. The workers who faced reduced earnings reported borrowing from family or friends (66% of those who faced wage reduction), receiving food distribution of the government (23%), borrowing from a micro lenders (MFI) (20%), borrowing from other small lenders (14%), receiving rations from the employer (9%) or receiving cash assistance from the government or from non-governmental institutions (both 4%). Male workers have borrowed from family or friends more often than female workers, and so did workers aged

40-49 and couples with more than two children.

COVID-19 Hygiene at the workplace. After return to work workers have assessed hygiene at the workplace and the supply of hygiene facilities. Workers are most positive about the safe distance or space in dining seating areas (56% assesses this as a low risk), followed by the independent use of all work equipment, as opposed to shared (46%). They were least

positive about a safe distance between work stations and number of washrooms/toilets, and more than two in ten workers assess the number of washrooms/toilets even as a high risk. Handwashing facilities are by a large majority of the workers assessed as adequate with a low risk. In contrast, gloves were certainly not adequately supplied, as more than seven in ten workers state that these are not adequately supplied. This may be due to the fact that use of gloves could affect workers' productivity,

1 THE PROJECT DECENT WAGE

The aims of the project

The project *Decent Wage Bangladesh phase 1*¹ aimed to gain insight in actual wages, the cost of living and the content of collective labour agreements in selected industries in Bangladesh, in order to strengthen say of trade unions through improved Collective Bargaining. [WageIndicator Foundation](#) has received funding for the project from [Mondiaal FNV](#), which is part of the [FNV](#) trade union confederation in the Netherlands. The project falls within the scope of Mondiaal's broad theory of change related to social dialogue. Four pathways of change have been identified, namely capacity building, knowledge and research, alliance building and lobby, and advocacy and campaigning.

Decent Wage Bangladesh phase 1 seeks to contribute to the knowledge and research pathway, in particular regarding wage patterns, the cost of living and the content of collective agreements. These issues have been addressed by Mondiaal's trade union counterparts in Bangladesh. Insight in wage levels in relation to Minimum Wages and Living Wages will foster the capacity of the trade unions to promote improved working conditions and better pay, to create alliances with likeminded stakeholders such as the Action, Collaboration, Transformation (ACT) initiative², and to strengthen their voice in lobby, advocacy and campaigning.

WageIndicator is an NGO with its websites having information about work and wages in the national languages in 140 countries. It has a wide network of correspondents in many countries around the world and a track record in collecting data and analysing data regarding

wage patterns, cost of living, minimum wages and collective agreements. For many years WageIndicator runs two multilingual online surveys on its websites, namely the *Wages and Work Survey* and the *Cost-of-Living Survey*, and it posts Minimum Wage rates and the content of Collective agreements on its websites. The *Wages and Work Survey* was adapted to be suitable for face-to-face interviews in Bangladesh. Both surveys were made available in an app. For this project WageIndicator collaborated with [Bangladesh Institute of Development Studies](#) (BIDS) in Dhaka, with a track record in conducting high quality research and enterprise surveys in the country and with whom a long-lasting relationship exists.

At the time of writing, phase 2 of the project was under negotiation. This phase will focus on decent work compliance with the National Labour Law, the Minimum Wage Regulations and the Collective Labour Agreements in different sectors. Based on these data and the strategy of the trade unions, training packages can be developed together with the trade unions on how to set up 'mini' social dialogues in order to improve compliance with wages and working conditions in these factories.

Five studies and several webpages

To contribute to the knowledge and research pathway, five studies have been undertaken, namely a worker and employee survey (face-to-face) on wages, a survey on the cost-of-living, an inventory of collective agreements, an inventory of Minimum Wage rates, and desk research regarding the four selected sectors in Bangladesh. The *Cost-of-Living Survey 2020* aimed to identify the cost of living in relatively

¹ See <https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>

² The ACT is an agreement between 20 global brands, retailers and trade unions to improve wage and working conditions in the garment, textile and footwear industry. The ACT is a commitment to living wages in the sector thereby providing a framework through which all relevant actors can exercise their responsibility and role in achieving living wages.

low income neighborhood in major cities in Bangladesh and to calculate the related living wage in selected regional divisions. The *Wages and Work Survey 2020* aimed to report about the wages earned by Bangladeshi workers in detail as well as their working conditions in selected sectors and regional divisions. The *Collective Agreements Database* aimed to provide insights in the state-of-the-art regarding collective bargaining in selected sectors and regional divisions. The *Minimum Wages information* was collected with the aim to compare the minimum wage rates with the wages reported by the workers in the survey. The *desk research* aimed to provide an overview of the economic situation of the four selected sectors, including their employment figures and for the Ready Made Garment (RMG) and Leather and footwear sectors and the Tea estates their export position.

In addition to the five studies, WageIndicator supplemented the knowledge and research pathway with relevant information on its [Bangladesh website](#) and with visual graphics and photos on the [project webpage](#). The results of the *Cost-of-Living* survey can be seen [here](#). The results of the *Minimum Wage* inventory can be seen [here in English](#) and [here in Bengali](#). The results of the *Collective Agreements* inventory can be seen [here](#). Visuals of the *Wages and Work Survey* can be seen [here in English](#) and [here in Bengali](#).

Outline of the report

This report presents the results of the five studies. Chapter 2 is predominantly based on the *desk research* and details the four sectors. Chapter 3 extensively reports about the workers' earnings in the four sectors, as reported in the *Wages and Work Survey 2020*. Chapter 4 details the findings of the *Cost-of-Living Survey 2020*. Chapters 5, 6, and 7 report about the occupations and educational attainments of the workers in the survey, their working hours, and the characteristics of their employment contracts. Chapter 8 tells the story of how COVID-19 has primarily affected the working

conditions in four sectors, based on the data of the *Wages and Work Survey 2020* and additional information from the desk research and reported by the interviewers. Chapter 9 summarizes the worker's household composition and income, based on the survey. Chapter 10 details the *Minimum Wages*, and Chapter 11 does so for the *Collective Labour Agreements*. Each chapter also briefly describes the relevant concepts and research methods. Appendix 1 detail the fieldwork of the *Wages and Work Survey*. Appendix 2 presents the questions and answers of the *Wages and Work Survey 2020*. Appendix 3 does so for the *Cost-of-Living Survey 2020*. Appendix 4 includes the list of the Collective labour agreements.

Selecting regional divisions and sectors

The *Wages and Work Survey 2020* did not aim for a representative sample of the full labour force in Bangladesh, but for a picture of the low-wage sectors, as these sectors are relevant for exploring compliance with the Minimum Wage rates and the Living Wage levels. No weighting of the data was applied because national representative information regarding the selected sectors and regional divisions were not available.

After close consultation with BIDS and Mondiaal FNV three of the eight regional divisions of Bangladesh have been selected for the *Wages and Work Survey 2020*, taking into account factors such as industrial activity, size of the region, distance to the capital city, and weather conditions. The three selected regional divisions are Chattogram(known as Chitagong), Dhaka, and Sylhet, which in total represent slightly over 50% of the total population in Bangladesh. From other sources WageIndicator could add data points to the *Cost-of-Living Survey 2020* for a fourth region was selected, namely Rajshahi.

For the *Wages and Work Survey 2020* four low-wage industrial sectors were selected, namely tea gardens and estates in Chatta-

gram and Sylhet, and construction sites, RMG factories and leather and footwear factories in Chattagram and Dhaka. For the **Collective Agreements Database** the same four sectors were selected. However, it turned out that only Agreements from two sectors could be collected, namely RMG and leather. In construction collective labour agreements were found to be non-existent and in tea they are available, but were not provided to the BIDS research team despite assurance of sharing by the sector's trade union representative. Sector-specific information about **Minimum Wages** was set for two sectors, namely RMG and leather, while for construction and tea no minimum wages apart from the national minimum wage are set.

and tea gardens/estates were to be selected

randomly from each specified area. For construction it was necessary to walk around and search respondents under the listed occupations. All interviews were done with permission from top management of the workplace.

The numbers of visited factories/gardens/estates were as follows. Tea: five (5) gardens and fifteen (15) estates. Leather: thirty-four (34) factories. RMG: sixty-five (65) factories. Construction: construction sites were visited.

The fieldwork for the two surveys was initially scheduled between March and June 2020.

Table 1 Number of completed interviews by sector and regional division

	Chattagram	Dhaka	Sylhet	Total	Col %
	N	N	N	N	
Tea gardens and estates	65	0	336	401	21%
RMG	114	610	0	724	38%
Leather, footwear	46	291	0	337	18%
Construction	185	247	0	432	23%
Total	410	1148	336	1894	100%
Row %	22%	61%	18%	100%	

Source: *Wages and Work Survey Bangladesh 2020 (N= 1894)*

Sampling and fieldwork³

The sampling strategy for the workplaces to be interviewed for the **Wages and Work Survey 2020** was as follows. Lists of member factories and tea gardens/estates were given to BIDS by the Leathergoods and Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB) and the Bangladesh Tea Board. Information on some tea garden locations was also collected during the preceding Cost of Living Survey in the respective regions. No list of factories was necessary for RMG since the survey teams were well-acquainted with the RMG factory clusters in different areas. The factories

However, in March and April it became evident that the COVID-19 pandemic would affect the country severely, and by November the country ranked fifth in Asia according to the COVID-19 dashboard of the World Health Organisation (WHO).⁴ As a consequence, the fieldwork had to be postponed. This delay allowed to add a few survey questions how the pandemic affected the workplaces and the workers. Test interviews were held in July and August. The fieldwork for the **Cost-of-Living Survey 2020** was done between 20th of August and 1st of September 2020. After completion of this

³ The sampling approach and the fieldwork are described in great detail in Appendix to Wages in Bangladesh, Sampling and fieldwork of the Wages and Work Survey 2020. Amsterdam, WageIndicator Foundation, available online, see <https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>.

⁴ See <https://covid19.who.int/table>, accessed 27 Nov 2020.

survey, the survey teams returned to Dhaka city and had 5 days of training at BIDS for the *Wages and Work Survey 2020*. The fieldwork for the *Wages and Work Survey 2020* was organised between 2nd of September and 2nd of November 2020. Data intake was monitored on a daily basis.⁵ For the *Wages and Work Survey 2020* in total 1,894 face-to-face interviews with workers were held. For the *Cost-of-Living Survey 2020* 132 questionnaires were completed. For each interview the purpose of the study was explained to the interviewee and consent was asked. The data of all interviews are anonymous. No workers and no factories/estates can be identified by name.

For the *Wages and Work Survey 2020* two teams of 5 interviewers and one supervisor conducted the interviews, of which 10 did between 160 and 192 interviews each. In view of the pandemic, the survey team was acting according to the safety protocol and all survey participants received either a pack of masks or an equivalent cash as incentive to participate in the survey. The interviewers had good experiences with the survey and app in general. A final survey question asked the interviewers to rate the cooperation of the worker during the interview. Almost eight in ten workers cooperated 'good' or 'very good' and another two in ten 'fairly'. Only one worker cooperated 'badly'. Compared to female workers male workers cooperated slightly more often 'good' or 'very good'.

Table 1 shows that the fieldwork covered three regional divisions and four sectors of industry. Most interviews, namely 610, were held in RMG in Dhaka. Next, 336 workers were interviewed in the tea gardens/estates in Sylhet. In leather and footwear in Chattagram the least workers were interviewed, namely 46. Two workers refused to participate, 19 did not have paid work, and 28 did not work in the four targeted industries. These cases were excluded from

the analysis, resulting in valid data from 1,894 workers. The tables in this report are based on these 1,894 interviews.

The key characteristics of the sample

The survey aimed to reach out to both male and female workers. The male workers outnumber the female workers by 1,069 to 817, with 8 persons for which gender information is 'other'.⁶ Table 2 shows that women make up the vast majority of workers in the Sylhet tea gardens/estates and in the Chattagram RMG. In leather and footwear women are approximately one-third of the workforce, whereas hardly any women are working in construction. The survey aimed to reach out to all age groups. On average the workers are 30 years of age. Workers in tea are on average 33 years old, whereas workers in RMG count on average 26.5 years. It should be noted that interviewers reported that some workers in the tea gardens or estates could not state (or declined to answer) their actual age.

The survey aimed to reach out to formal as well as to informal workers. In the *Wages and Work Survey 2020* formal and informal work was defined by considering workers on a permanent contract and a contract through an intermediary as formal, and workers without an employment contract as informal. Table 2 shows that on average 32% is an informal worker and that this percentage is substantially higher in construction, but lower in RMG, with tea and leather in between.

Within each factory, garden, estate or workplace, the composition of the interviewed workers had to reflect as much as possible the different job titles in the workplace. Finding different occupations was most challenging in the Construction sector since one cannot tell what kind

5 For monitoring daily data-intake WageIndicator uses a tool called Questanalyser. For the Wages survey this tool allows to break down the data-intake by region, industry and other dimensions. Also BIDS team followed the survey through online reporting by the enumerators using google forms (see Appendix 1).

6 Note: In this report the results are regularly broken down by gender. We do so for male and female workers only, because the number of workers whose gender is 'other' is too small for meaningful breakdowns.

of construction work may be going on inside

a construction site or building. This was the case for construction workers on public-sector sites in the occupations of Electric Wireman, Tiles Fixer, Plumber, Painter, and Liftman. Private-sector workers were relatively easier to identify.

Table 2: Percentage of females, percentage of informal workers and mean age, by sector and region

	% Female	% Informal	Age - Mean
Tea gardens/estates Chattagram	43%	58%	33
Tea gardens/estates Sylhet	73%	22%	38
RMG Chattagram	73%	0%	26
RMG Dhaka	56%	1%	27
Leather Chattagram	28%	9%	33
Leather Dhaka	35%	20%	27
Construction Chattagram	1%	99%	29
Construction Dhaka	0%	98%	29
Total	43%	32%	30

Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing gender = 6, employment contract = 0, age = 10)

2 THE FOUR INDUSTRIES

Ready Made Garment (RMG)

Bangladesh was one of the countries that in the 1970/80s took advantage from the fact that in the 1970s a number of vested RMG and textiles producing countries, such as Japan, South Korea, HongKong and Taiwan, were confronted with limits to their quota in the importing countries agreed upon in the Multi-Fibre Arrangement (MFA). As a result, processes of 'quota hopping' started. With regard to Bangladesh a first sign could be seen in 1978, when the South Korean Daewoo conglomerate signed a collaboration agreement with Desh, a local Bangladeshi RMG producer. This entailed starting up a large plant involving technical training, purchases of machinery and fabric, and marketing. Trained workers that left Desh set up export firms of their own. Through its 1982 New Industrial Policy, the country's government embedded such moves in an export-oriented industrialization strategy. RMG exports grew strongly, spurred by the abundant labour supply of young women from the countryside and the favourable trade position of Bangladesh under the Generalized System of Preferences (GSP) program of the EU in which –after the MFA was phased out– the country got the status of least developed country (LDC). In 2000, Bangladesh's RMG exports amounted to USD 4,785 million, or 2.3% of total world exports and 75% of the country's merchandise export value. Employment in RMG production exploded from 200,000 in 1985-86 to 1.8 million in 2001-02 (Staritz 2011, 134-141; authors' calculations based on UNCTADstat Database).

In the 2000s Bangladeshi's RMG industry proved to produce at low productivity levels, hampered in particular by poor infrastructure. For a while that could be offset by extremely low labour costs – in 2008 arguably the lowest in the world (Berik and Van der Meulen Ro-

dggers 2010, 61). However, in the late 2000s in international perspective Bangladeshi production costs per unit of output developed unfavourably, and awareness among stakeholders grew that the focus had to turn towards product quality, training, and better and safer working conditions (Staritz 2011, 148; McKinsey 2011). However, the Rana Plaza disaster marked the watershed here and speeded up the need for action. On April 24, 2013, Rana Plaza, a nine-story building housing several RMG factories in an industrial district near the Dhaka capital, collapsed. It killed 1,134 garment workers and injured more than 2,000 – exposing to the world appalling working conditions and a rigorous lack of compliance with building regulations (cf. Theuws et al. 2013).

The disaster initially weakened the international community's confidence in Bangladesh. Global buyers, in particular those for whom RMG was produced in the collapsed building such as Inditex (Mango), Primark, Walmart and Benetton, felt the pressure of the public opinion at home. Already in 2013 mostly European buyers, along with the ILO and the global union umbrellas IndustriALL and UNI Global, initiated the Accord on Fire and Building Safety in Bangladesh, the only legally binding multi-stakeholder compact for the RMG industry agreed with the Alliance for Bangladesh Worker Safety. In 2014 Better Work Bangladesh (BWB) started up as part of a package of ILO initiatives aimed at improving conditions in the RMG industry. The Bangladeshi government renewed a National Tripartite Plan of Action (on Fire Safety and Structural Integrity in the Garment Sector of Bangladesh, NTPA).

The RMG industry has continued to play a major role in the economy of Bangladesh, definitely in terms of export income and employment. Throughout the 2010s Bangladesh settled as the world's second largest RMG

exporter; accounting in 2019 for 6.2% of world RMG exports, its exports were only surpassed by those of China (33.1%). Recently about three-fifth of the Bangladeshi RMG exports were directed to the EU28, a much higher proportion than other Asian exporters and an orientation stimulated by the EU's GSP/Everything but Arms (EBA) scheme, shielding RMG exports to some extent from competition from China (authors' calculations based on UNCTADstat Database; Van Klaveren and Tijdens 2018, 11). The RMG exports dominate the country's income from merchandise exports. With the value of these exports in 2019 making up USD 32,433 million, their share in total exports was 84% – in international perspective an extremely high share for one sector.

It should be noted, however, that at USD 10,180 million in 2019 the *imports*

in Bangladesh of *textiles*, the main raw material base for RMG products¹, are also considerable. Amounting to 33% of RMG's export value, this takes away a part of the country's export advantage.

Apart from RMG manufacturing, Bangladesh is only a modest producer and exporter of textile products, representing in 2019 an export value of USD 1,792 million, and with 0.6% of the world total in textiles ranking 14th among the exporting countries (UNCTADstat Database).

Based on various sources, employment in 2020 in the RMG industry of Bangladesh can be estimated at 4.3 million -- a number that has stabilized from 2015 on. Of this total, 3.5 million or about 80% were women (cf. Van Klaveren 2016, 13). The industry, in total amounting to some 5,500 factories owned by about 2,500 suppliers², can be divided in three tiers. About 250 first-tier factories, all directly supplying international buyers, are located in the country's eight Export Processing Zones (EPZs).³ For 2017/18, we mapped 579 Bangladeshi factories mentioned by 24 major garment and footwear-selling firms or brands as directly supplying them (Van Klaveren and Tijdens 2018). We regard the remaining (about) 330 factories outside EPZs also to belong to the first tier as they or their owners had direct relations with foreign buyers too. Klan and Wichterich counted the latter as belonging to a second tier that they totalled at nearly 1,900 factories while they labelled as a third tier 3,400 factories without direct relations with foreign buyers and based on subcontracting. In their characterization of these second and third tiers, "the majority of the factory owners operate their business with an informal sector mindset by adjusting their production according to demand, through a variety of means in-



1 Worldwide, about two-third of textile outputs are used as inputs for RMG production; we assume this relationship does not differ substantially for Bangladesh. The main strength of Bangladeshi textiles, accounting for over half of its exports, is in the production of home textiles (bed sheets, curtains, table covers, bath linen, etc. – Basak 2018).

2 *Mapped in Bangladesh* (<https://map.rmg.org.bd/>) contained as per 23 November 2020 3,212 factories. A check with the database we compiled for our 2018 report made it plausible that quite some cases with suppliers owning more than one factory in *Mapped in Bangladesh* have been registered as 'one factory (facility)'.

3 According to the Bangladesh EPZ Labour Act 2019, workers in EPZs have the right to form Workers Welfare Associations (WWAs) through which pseudo-unions they are supposed to negotiate with their employer on terms and conditions.

cluding subcontracting or outsourcing to other factories or sweatshop-like facilities” (Klan and Wichterich 2015, 8).

A closer look at the 579 RMG and footwear factories we could trace in detail for 2017/18 is worthwhile. 82% of these factories were located in Dhaka and 13% in the Chattagram region. A, in international comparison, high share of these factories (38%) supplied more than one international brand at the time. Also, a relatively high share (72%) was large, that is, had over 1,000 employed, while 7% (39 factories) counted even over 5,000 workers. A majority (79%) was national-owned, 20% was

3,500 trade unions in the industry has been estimated at 123,000, indicating that slightly less than 3% of all workers was organized. This connects with the estimate that about 4% of factories had a trade union presence. The same source estimated the female share in trade unions at 15%, or 19-20,000 women, implying their union density in 2019 to end up at some 0.6% (DTDA 2020, 6). Equally worrisome are prospects for the improvement of health and safety conditions in the RMG industry. For example, in 2018 a message on the ILO website presented harsh conclusions in this regard: “Since the Rana Plaza disaster, no fewer than 109 accidents have occurred. Among these, at



foreign-owned and 1% related to joint-ventures between these two categories. Foreign factory owners were rather often located in Hong Kong (34 factories), India (25) and South Korea (16). Remarkably, only nine of the 39 factories (23%) in Bangladesh found in the largest class were foreign-owned (Van Klaveren and Tijdens 2018, 22, 23, 28, 44).

The current situation as regards the trade union movement in Bangladesh’s RMG can be characterized as worrisome. This is clearly the case when one focuses on trade union density. For 2019, total membership of the about

least 35 were textile factory incidents in which 491 workers were injured and 27 lost their lives. In the absence of a well-functioning labour inspection system and of appropriate enforcement mechanisms, decent work and life in dignity are still far from reality for the vast majority of workers in the garment industry and their families.” Assessments in the same vein may negatively affect the economic perspectives of the Bangladeshi RMG industry if growing numbers of consumers in the developed countries become aware of these condi-

tions, and corporate social responsibility (CSR) rises (again) on societal agendas.

For a while, the worldwide Coronavirus crisis may stand in the way of such consumer and CSR consciousness. However, one should be aware that the pandemic has hit the Bangladeshi RMG industry quite hard. In an early stage, by late March 2020, an online survey of employers in this industry learned that more than half of them have had the bulk of their in-process, or already completed, production cancelled; in case of order cancellation, 72% of buyers refused to pay for raw materials already purchased by the supplier, and 91% did so for the production cost. At the time, already more than one million RMG workers in Bangladesh were fired or temporarily suspended from work as a result of cancellations (Anner 2020). According to Bangladeshi statistics, the country's export income from RMG in the second quarter of 2020 decreased by 45% compared to the preceding quarter, down from USD 6,305 million to USD 3,531 million (website Central Bank of Bangladesh, Commodity-wise export receipts⁴).

The *Mapped in Bangladesh* website presents data showing that 3,212 RMG factories have been located in Bangladesh.⁵ In these factories 58.5% of the workers are women. In the *Wages and Work Survey* interviews have been held with 724 RMG workers in 65 factories in Chattagram and Dhaka. In the survey 59% of the workers are female, which is comparable to the percentage found on *Mapped in Bangladesh*. As Table 3 shows, six of these factories employ less than 100 employees, 24 between 100 - 500 employees, 9 between 500 – 1,000 employees, and the remaining factories are large ones with over 1,000 employees.

All 65 factories are private enterprises with 45 of them having a private single ownership and 20 a joint private ownership.

Leather and footwear

In Bangladesh, the leather industry has remained relatively small, employing according to the latest reliable estimate, as of 2015, including footwear manufacturing about 80,000 people (Van Klaveren and Tijdens 2018, Table 5). Two sub-sectors can be identified: tanning and the production of leather goods, the latter including footwear. In 2015 employment in Bangladesh's footwear manufacturing was estimated at 50,000, with another 10,000 engaged in the production of other leather goods. Moreover, around 15,000 (predominantly male) workers were employed in the tanning industry (SOMO/CBSG 2015).

Whereas 2015 domestic hides and skins accounted for 90% of all raw material used for the leather products manufactured in Bangladesh and 10% of the value of hides and skins to be processed were imported (SOMO/CBSG 2015), we estimate that in 2019 these figures came at 95% and 5% respectively. On a similar basis it can be estimated that recently some 40% of leather processed in the country is exported while the remaining 60% is used for the domestic production of footwear and leather goods (authors' calculations based on data from the Leather Sector Business Promotion Council (LSBPC) and UNCTADstat Database).

The share of Bangladesh in the world exports of leather grew rapidly between 2005 and 2015 but stabilized afterwards, at 1.3% of the world export total in 2019.

Table 3 Factories in RMG by firm size and by ownership

Firm size	10-100	100-500	500-1000	>1000
Nr of factories	6	24	9	26
Ownership	Private single ownership	Joint ownership	Private limited company	
Nr of factories	45	20	0	

Source: *Wages and Work Survey Bangladesh 2020* (N= 1894, data aggregated by factory)

⁴ Excluding EPZ-related trade.

⁵ See <https://map.rmg.org.bd/> accessed 24 Nov 2020. The garment factory map of the [Open Apparel Registry](https://openapparelregistry.org/) presents more than 5,000 factories for Bangladesh.

The country's share in the world exports of footwear showed the same pattern though at a lower level, stabilizing at 0.6%. In 2015-2019 the Bangladeshi leather and footwear exports jointly accounted

Bangladeshi government to expand and upgrade the leather industry as well as with the existence of an educational and technological infrastructure at two universities (Wikipedia Leather industry in Bangladesh).



leather and footwear exports jointly accounted for 0.7% of world exports, in 2019 making up USD 1,105 million (Footwear is a much larger market, with global exports eight times those of leather). Overall, nearly 50% of these exports went to the EU28, 25% of leather exports but 56% of those of footwear. Except for China/HongKong where 38% of leather exports (but only 3% of footwear) went to, other destinations had much lower shares (Japan respectively 6% of leather exports and 10% of footwear exports, USA 0% respectively 13%, and South Korea 12% respectively 1.5% -- data from UNCTADstat Database). The country's stagnating production and export performance is in contradiction with the ambitions of the

A major factor behind this stagnation can be found in the conditions under which the crucial supply facilities for leather manufacturing, the tanneries, for many years have been operating. Already in the early 2000s complaints were manifold as regards the hazardous working conditions, including evidence of child labour, and the heavy pollution linked with the about 200 tanneries, 95% of all in the country, that were concentrated in Hazaribagh, part of Old Town, Dhaka and a quite poor and over-populated area. Also, for two decades ago these tanneries were ordered to shut down and move but deadlines passed without consequence. In 2017, Bangladesh's High Court even ordered authorities to stop supplying gas,

Table 4 Factories in Leather and footwear by firm size and by ownership

Firm size	10-100	100-500	500-1000	>1000
Nr of factories	6	19	4	5
Ownership	Private single ownership	Joint ownership	Private limited company	
Nr of factories	20	10	4	

Source: *Wages and Work Survey Bangladesh 2020* (N= 1894, data aggregated by factory)

water and electricity to the Hazaribagh tanneries (Mendoza and Alam 2017). Finally, in 2018 155 tanneries were relocated to a more modern and larger industrial estate in Savar, 10 km North from Hazaribagh and 30 km from the Dhaka city centre; some 40 could not afford such relocation and stopped their operations (Akter and Al Mahfuz 2018). However, and in spite of official claims, in August 2019 the newly planned Common Effluent Treatment Plant (CETP), meant to treat the industrial waste water in Savar for its reuse or safe disposal, was still not operational. This led tanneries to discharge their untreated waste into a nearby river – like earlier in Hazaribagh. As a result, Bangladeshi exporters can only sell at rates 30% below the global prices as long as the Leather Working Group (LWG), the global compliance audit organisation, does not certify them due to non-compliance (Mirdha and Akash 2019).

Similar as the RMG sector of Bangladesh, leather and related manufacturing have also been hit severely by the Coronavirus crisis. The country's export income from leather and 'leather manufactures' (mainly footwear) fell in the second quarter of 2020 by 40% compared to the preceding quarter, down from USD 133 million to USD 80 million – thus, percent-wise only slightly less than the decrease in RMG exports (website Central Bank of Bangladesh, Commodity-wise export receipts⁶).

The leather and footwear factories in the *Wages and Work Survey 2020* are located in two regions, namely Chattagram and Dhaka. In leather and footwear, 337 interviews have been held in 34 factories, up to 19 workers per factory. As Table 4 shows, six factories employ less than 100 employees, 19 between 100 - 500 employees, 4 between 500 – 1,000 employees, and the remaining 5 factories are large ones with over 1,000 employees. All 34 factories are private enterprises with 20 of them having a private single ownership, 10 a joint private ownership while 4 are a private limited company.



Construction

In recent years the construction industry of Bangladesh has been expanding due to large infrastructure works in highways, railways, ports, power generation, telecommunication, and water utilities including a large bridge crossing the Ganges-Brahmaputra-Meghna river. Between 2015 and 2019, these activities gave a boost to employment in construction. While for 2015 construction employment could be estimated at about 3.5 million, just before the Coronavirus crisis that amount could be set at close to 4 million. Only about one-tenth of these workers, or maybe even less, can be assumed to be regular wage-earners with permanent contracts. The large majority is employed as a casual day-labourer, without an employment contract. Most of them find work through middle men or contractors (Mamin et al. 2019). Subcontracting is widespread, through the use of 'deep' subcontracting chains; on top, in the first tier, quite some foreign firms can be found (website Research and Markets). It should be noted that Foreign Direct Invest-

⁶ Excluding EPZ-related trade.

ment (FDI) in Bangladesh fell in 2019 by 56% (UNCTAD 2020). A role may have played here that in 2019 –in spite of ongoing urbanisation-- the market for residential buildings lagged behind and due to high housing prices showed signs of saturation (The Daily Star 2019).

Besides the wage and working time issues discussed in this report, occupational safety and health (OSH) is a key issue for construction workers. Globally, work in the construction industry is among the most dangerous of occupations, and unfortunately this is also the case for Bangladesh. In 2019 134 construction workers were reported as killed in workplace accidents (2018: 161; 2017: 131), whereas the injury rates for construction are extremely high as well, by industry after transport the country's second highest numbers -- while construction is notorious for under-reporting death or injury. Over the last 15 years the main causes of death have been falling from a height and electrocution. Reports and journal messages have documented the fatal combination of, on the one hand, workers' low risk awareness and weak negotiation positions and, on the other hand, the lack of risk prevention and of compliance with building regulations –if existing-- among owners, engineers

and contractors (BILS 2018, 2019; Mamin et al. 2019; BDNews24 2017; The Daily Star 2017). The Rana Plaza disaster has been testimony of both the country's lack of building regulations and a lack of compliance. Seven years later, considerable legal gaps remain. Although in the amendments to the Bangladesh Labour Act 2006, adopted on 15 July 2013, provisions to improve workplace safety have been included, it is significant that Bangladesh's administration up till now has not ratified the main international labour standards on OSH policy, namely, ILO Conventions No's 155 and 187 (ILO website).

For the *Wages and Work Survey 2020* it was not possible to identify the enterprises, as the interviewers went to construction sites. In these sites several enterprises are active. In total 432 interviews have been held with workers on construction sites.

Tea gardens and estates

Bangladesh's tea production is currently nearly fully destined for the domestic market. With 64,000 tons produced in its tea gardens or estates, according to the [World Atlas website](#) the country ranked 11th in the world in 2019



in this respect. This amount was 7% higher than the production level of nearly 60,000 tons reached on average in 2009-2011 (Ahammed 2012). In the past, the country's tea production was export-oriented but over the last four decades this changed drastically. In the 1980s Bangladesh exported on average 68% of its tea production, in the 1990s 50% and in the 2000s 19% (Ahammed 2012), while in the 2010s this share dwarfed to less than 4%. In 2019 Bangladeshi tea exports were about 0.51% of the world total, no longer placing the country under the top-15 tea exporting countries, and far off from the achievements of the largest tea exporters (in 2019, in this order, China, Kenya, Sri Lanka, India, and Vietnam -- UNCTADstat Database). In this development, and fuelled by a strong increase of domestic tea consumption (even larger than population growth, thus also increase per capita), the country changed into a net tea importer. Although some experts have argued for the Bangladeshi government to impose import restrictions on tea (f.e. ILO 2016, 20, 59), with USD 23 million in 2019 official tea imports are also rather limited. As a path to return to a major tea-exporting country, a renowned expert has emphasized the need to enhance productivity while reducing costs: "(...) production must be increased by investments in field, factory, labour welfare and human resource development" (Ahammed 2012, 1). In processes in this direction, the Bangladesh Tea Research Institute (BTRI), an autonomous organisation under the Bangladesh Tea Board (BTB), is designated to play a major role.

According to the BTB, the 7% increase in production mentioned for the last decade was largely reached at the same acreage. In the 2010s only in the Panchaghar district a few new gardens were created. Recently 164 tea

gardens were in existence in seven districts, of which 131 concentrated in three districts in the Sylhet Division in the North-Eastern part of the country, 22 in the Chattagram district, nine in the Panchaghar district, and two elsewhere (information: BTB; website tea-gardens-bangladesh). Three categories of gardens can be noted. The 'A' gardens belong to Duncan Brothers, James Finlay, Deundi Tea Co., the New Sylhet Tea Estate Ltd., and a number of other firms, all wholly or partly UK-owned. They dominate Bangladesh's tea trade and their yields are higher than those of the others. The 'A' gardens account for 25% of tea acreage and over 58% of Bangladesh's tea production. Category 'B' estates comprise the locally-owned private industry. They are seen as to have the potential to upgrade their quality but so far results have been rather meagre in this respect. Category 'C' exists of low yielding small estates, where workers suffer the worst conditions. By 2016, a total of 359,000 people lived in tea garden areas including 89,800 and 19,600 as registered and casual laborers respectively (ILO 2016, 27).

For the *Wages and Work Survey* 401 interviews have been held in five (5) tea gardens and fifteen (15) tea estates in two regions, namely Chattagram and Sylhet. Up to 29 workers have been interviewed per garden or estate. As Table 5 shows, one garden or estate employs less than 100 employees, 7 between 100 - 500 employees, 8 between 500 - 1,000 employees, and the remaining 4 gardens or estates are large ones with over 1,000 employees. All gardens or estates, except for 2, are private enterprises with 10 of them having a private single ownership, 6 a joint private ownership, and 2 are a private limited company. Two gardens or estates are owned by the government.

Table 5 Tea gardens and estates by firm size and by ownership

Firm size	10-100	100-500	500-1000	>1000
Nr of firms	1	7	8	4
Owner-ship	Private single ownership	Joint ownership	Private limited company	Government/Nationalized
Nr of firms	10	6	2	2

Source: *Wages and Work Survey Bangladesh 2020 (N= 1894, data aggregated by firm)*

3 EARNINGS

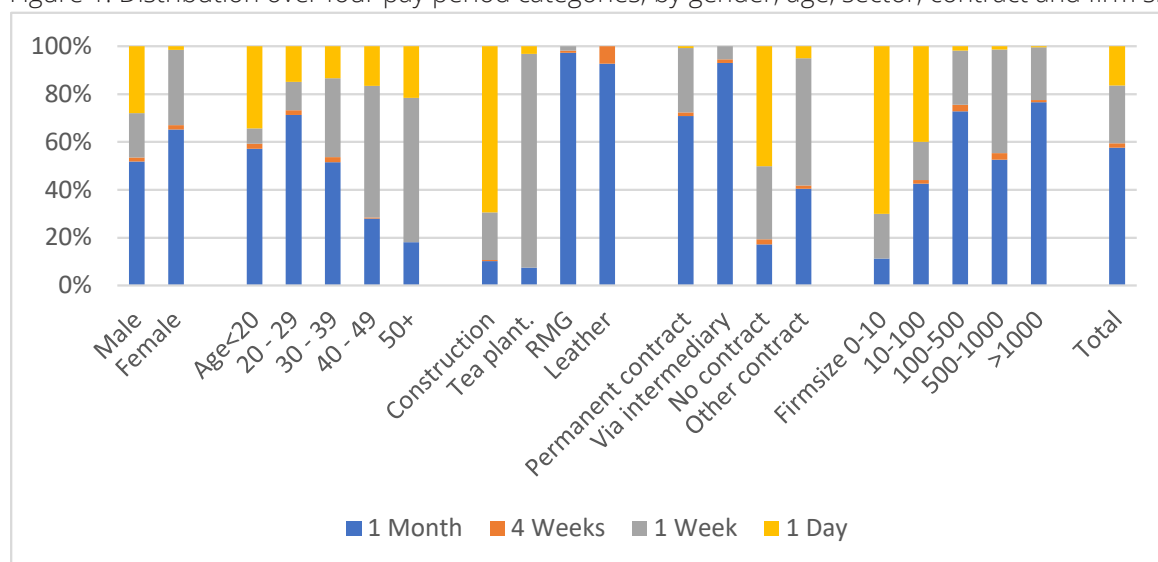
Pay per day, week or month

The survey has several questions about the workers' earnings, as will be discussed in this Chapter. A first question asks about the pay period. Almost six in ten workers report to receive their pay per month, just over two in ten receive their pay per week, and slightly less than two in ten do so per day, as shown in Figure 1. Compared to male workers the fe-

whereas in enterprises of 1,000 employees or more pay per month is common.

The survey contains a question about piece rate payments. Very few workers, namely 1%, indicate that they have piece rates. Piece rates are absent in construction and tea, almost absent in RMG, and a few workers in leather report so (almost 3%).

Figure 1: Distribution over four pay period categories, by gender, age, sector, contract and firm size.



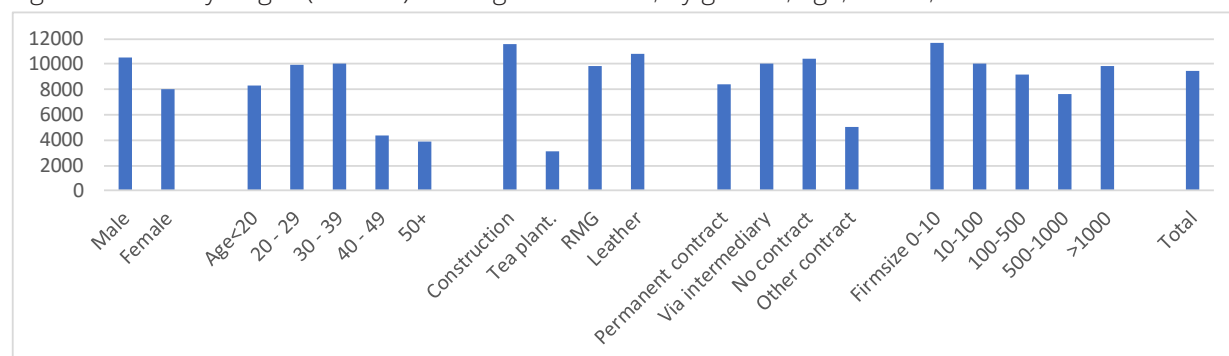
Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing pay period =2)

males receive their pay more often per month and per week, whereas male workers receive their pay more often per day. The latter is particularly due to the fact that pay periods in the male-dominated construction sector are predominantly per day, while pay per day is almost absent in the other three sectors. In the tea gardens or estates the usual pay period is per week, whereas in RMG and leather it is per month. The younger the workers, the more often they receive their pay per month. Workers with an intermediary contract report most frequently receiving a monthly pay, whereas workers without a contract most often report receiving their pay per day. Pay per day is observed frequently in micro-enterprises,

Hourly and monthly wages

To compare the workers' wages, it is common to compute hourly wages by dividing the reported wages by the hours worked per week and the pay period. For details about the hours worked, see Chapter 5. After computing the hourly wages, controls for data-entry errors were applied, and the highest plus lowest one percent of the hourly earnings were considered unreliable. To calculate the monthly wages, the hourly wages were multiplied by 48 hours per week and 4.33 weeks in a month. By doing so, overtime hours were excluded, and so were part-time or seasonal hours. Valid earnings were reported

Figure 2: Monthly wages (median) in Bangladeshi Taka, by gender, age, sector, contract and firm size.



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing wage = 40)

by 1,856 workers, which is almost 98% of the total sample of 1,894 workers.

Figure 2 reveals that the monthly median wage of the workers in the four sectors jointly is 9,500 Bangladeshi Taka (BDT). The median wage is the reported wage between the lowest and the highest reported wage.¹ The Figure shows that, with 77% of the males' median wage, the median monthly wage of female workers is much lower. This reflects the gender pay gap, noticed around the world. The main reason for this pay gap is not that women and men are paid differently for the same work: it rather reflects that men and women work in gender-segregated parts of the labour market.

Women are dominating the low-paid work in the tea gardens/estates. Figure 4 shows that the median wages in tea are less than half of those observed in construction, RMG and leather. In addition, workers aged 40 and over are paid substantially lower wages than younger workers. This can partly also be ascribed to the presence of older women in the tea gardens and estates. Workers who are hired via an intermediary show the highest median wages, whereas workers with another type of contract have relatively low median wages.

Figure 3: Percentage of workers paid at or above the applicable Minimum Wage rates and at or above the Living Wage, by gender, age, sector, contract and firm size



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing wage = 40).

¹ The median wage is the middle of all observations within a defined category, so when all the wages are listed from smallest to largest, we take the number exactly in the middle. It should not be confused with the average or mean wage, which is the sum of all wages of the individuals divided by the number of observations. The median has the advantage that it is not overly influenced by a few very high or very low earners.

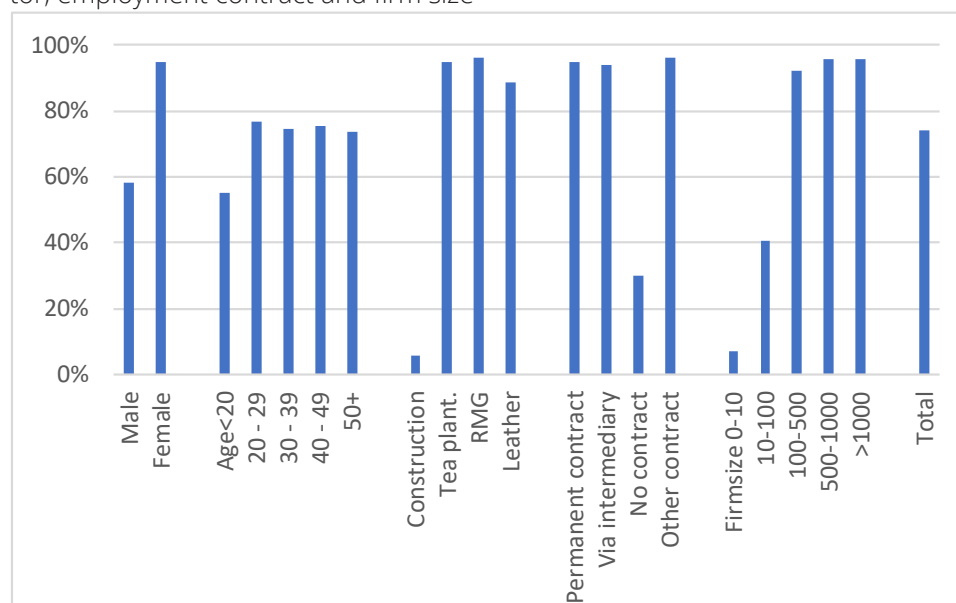
Minimum wage and Living wage

Bangladesh has a National Minimum Wage, which is since 2013 set at BDT 1500 per month. No exact figures are available for the rate of the National Minimum Wage in 2020 and therefore it is estimated, assuming a 5% yearly increase plus 40% for house rent allowance, BDT 600 for Medical Allowance and BDT 1,250 for Travel and Food Allowances. This would make the National Minimum Wage rate 2020 to BDT 4,805. The earned wages for the tea and the construction sectors are compared with this rate, as these sectors have no sector-specific minimum wage. By contrast, RMG and leather have a sector-specific minimum wage rate, namely BDT 8,000 per month in RMG and in leather BDT 9,350 for the least skilled grade, BDT 10,520 for the middle skilled grade, and BDT 13,520 for the most skilled

applicable minimum wage rate. Figure 3 shows in which groups this occurs most frequently. Pay at or above the Minimum Wage is most reported in construction and least in tea. It is highest in small firms with less than 10 employees and lowest in firms with 500 – 1,000 employees. It is lower for female compared to male workers.

The workers' monthly wages could also be compared to the living wages in each region, as derived from the *Cost-of-Living Survey 2020* (see Chapter 4 for details). The Living wages are far above the minimum wage levels. Just over 10% is paid a wage above the living wage, as Figure 3 shows. In Sylhet, with its low wages in the tea gardens and estates, none of the workers earns a Living wage.

Figure 4: Percentage of workers receiving an annual bonus by gender, age, sector, employment contract and firm size



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing annual bonus = 4)

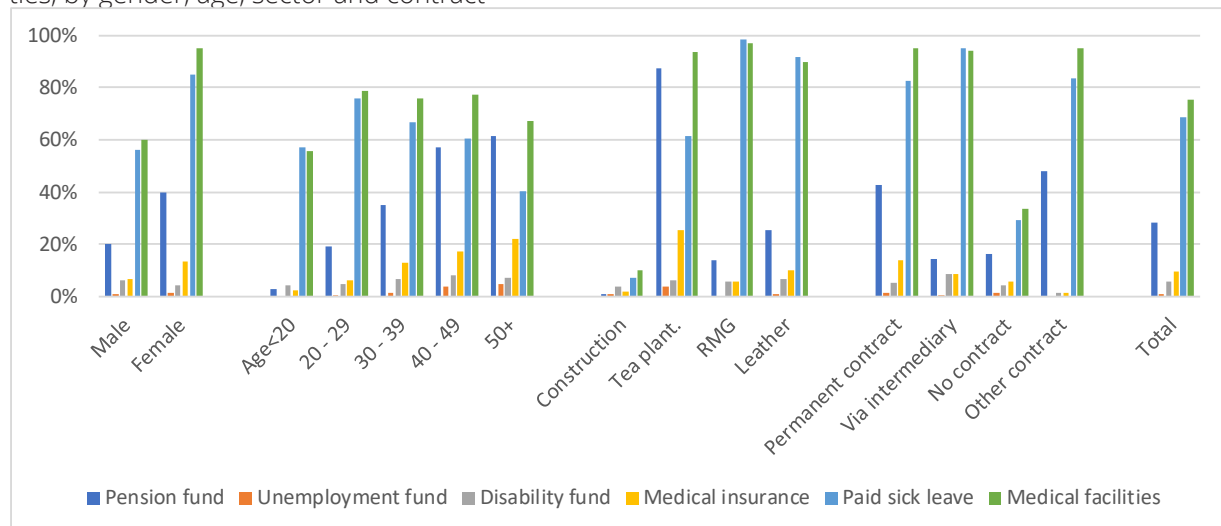
grade (see Chapter 10 for details). For leather the skill level of the workers is assumed to be based on their reported job titles.

The workers' monthly wages, as computed in the previous section, have been compared to the relevant monthly minimum wage rates. The result of our analysis shows that 64% of the workers in the survey is paid at or above the

Annual bonuses

The survey has a question about annual bonuses, such as an end-of-year bonus, holiday bonus, festive bonus, or similar. Seven in ten workers report that they receive such an annual bonus. Figure 4 reveals that male workers report so less often than female workers, that workers younger than 20 years report so less

Figure 5: Percentage of workers provided social security, paid sick leave and access to medical facilities, by gender, age, sector and contract



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing plus don't know Pension fund=105, Unemployment fund=84, Disability fund=127, Medical insurance=210, Paid sick leave=12, Medical facilities=11)

often, that annual bonuses are hardly observed in construction, that workers without a contract receive an annual bonus far less often than workers with other contracts, and that workers in small firms receive so less often than workers in larger firms.

Social security

The survey contains several questions about social security, asking whether the workers themselves or their employers contribute to a pension fund, an unemployment fund, a disability fund, or security in case of sickness (see Figure 5). Almost three in ten workers report that they participate in a pension fund, and this is remarkably high in the tea estates. Hardly any worker reports to be participating in an unemployment fund and very few report so regarding a disability fund. One in ten reports that their employer provides medical insurance, and this is again observed relatively often in the tea estates. In contrast to the low participation in the social security funds, the entitlement to paid sick leave and the access to medical facilities is frequently mentioned. Seven in ten report that they are entitled to paid sick leave. Almost eight in ten report that they have access to medical facilities, provided by their employer.

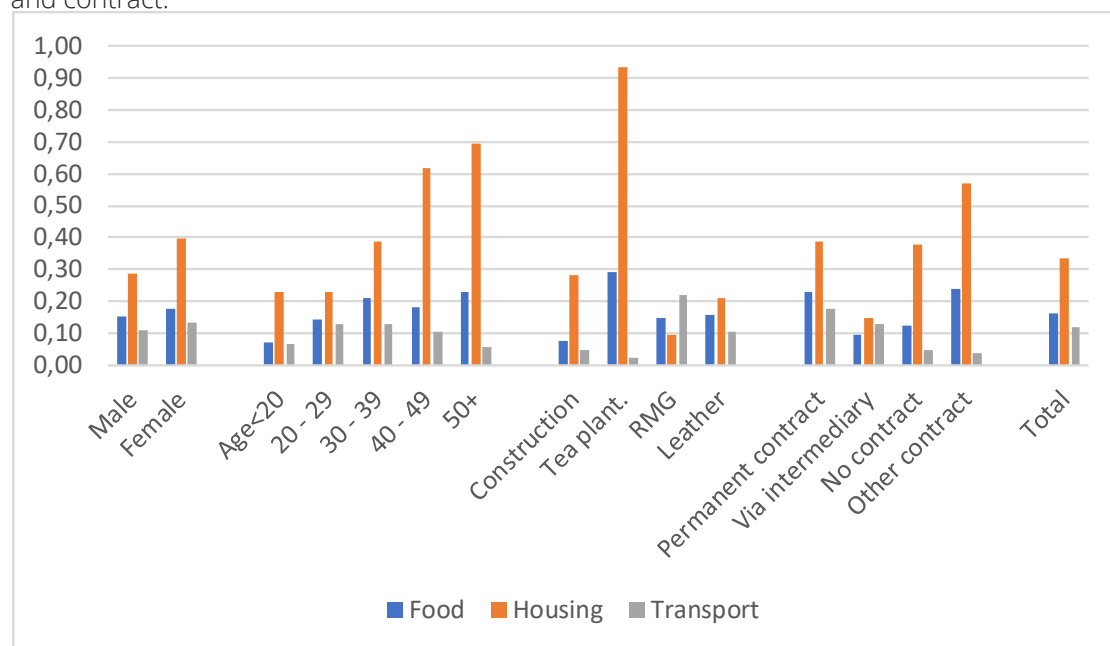
Female workers participate more than males in

all funds and facilities. The older the workers, the more they participate in a pension fund. Compared to workers in the other three sectors, the workers in tea gardens/estates participate more in all funds apart from paid sick leave. Social security is almost absent in the construction sector.

Benefits from the workplace

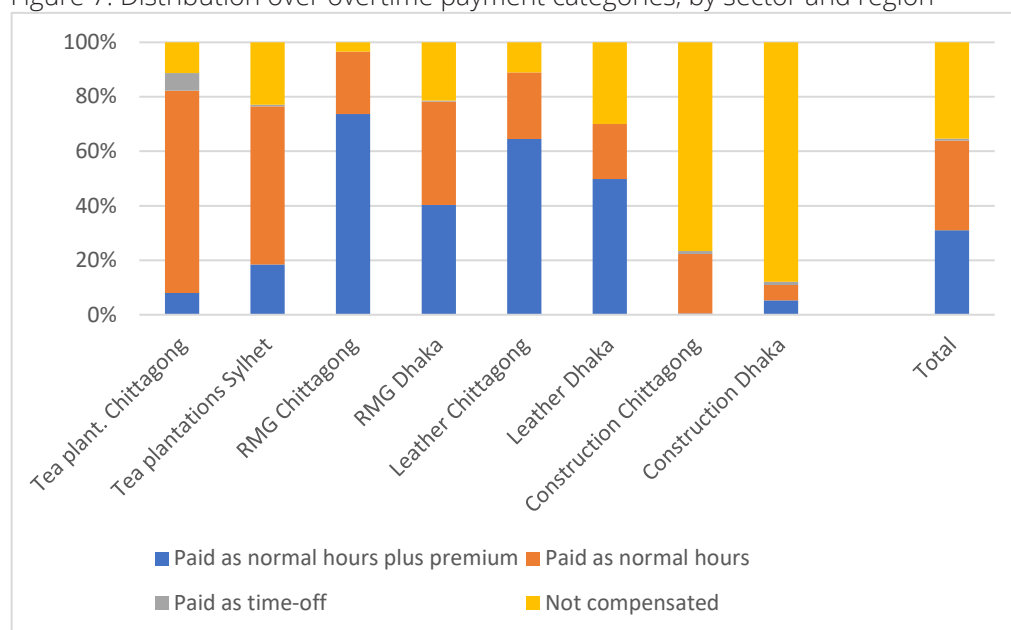
The survey contains four questions about benefits from the workplace, namely food, housing, clothing, and transport. Food is reported by almost two in ten workers, housing is so by more than three in ten workers, clothing by hardly any worker and transport by just over one in ten workers. Except for clothing, Figure 6 depicts these benefits broken down by groups of workers. All three benefits are reported more often by female workers compared to males, least by young workers and most by workers aged 50 and over. Food and housing are substantially more often reported in the tea gardens and estates than in the other sectors: nine in ten workers in the tea sector report that housing is provided by the employer. Transport is most often provided in RMG and leather. Workers with a contract via an intermediary least often receive food and housing contributions, but transport is equally provided to them as to the workers with a permanent contract.

Figure 6: Percentage of workers receiving benefits from the workplace, by gender, age, sector and contract.



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing Food=2, Housing=3, Clothing=8, Transport=9)

Figure 7: Distribution over overtime payment categories, by sector and region



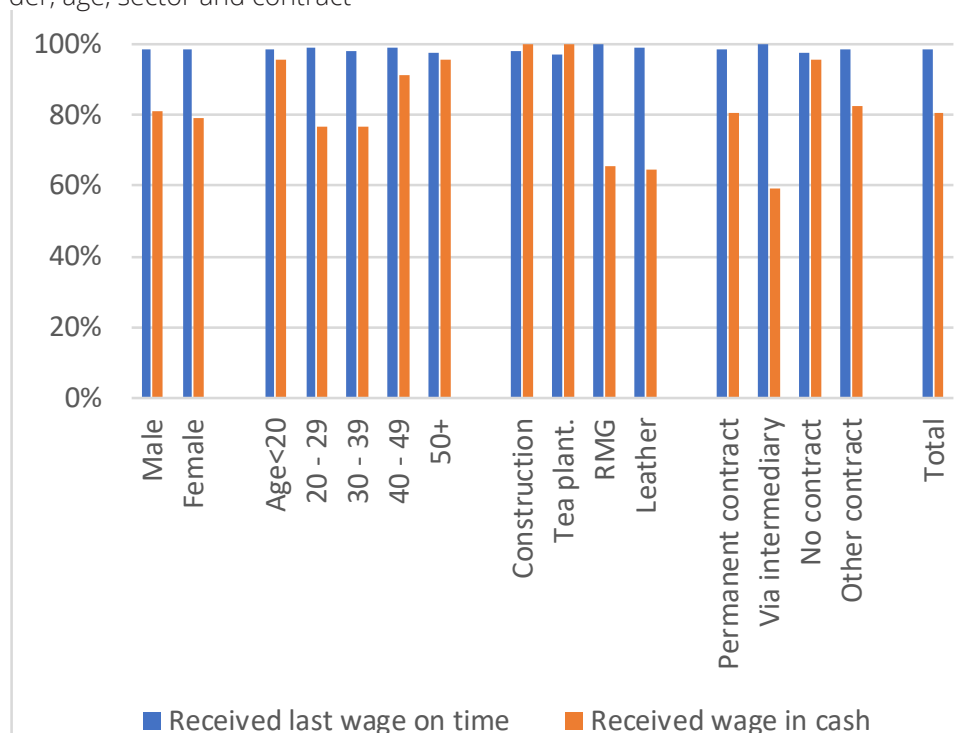
Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing overtime payment = 49 including don't know)

Overtime pay

The survey asks how overtime hours were paid. This is asked to all workers, whether they make overtime hours or not. Almost one in three workers says that overtime hours are paid as normal hours plus a premium (Figure 7). One in three reports that overtime hours are paid as normal hours without a premium,

and just over one in three says that these hours are not paid. The latter is particularly the case in construction in Chattagram and Dhaka. Though workers in construction work long contractual hours, they hardly have overtime hours. Hence, not paying overtime hours is as such not a major problem here. In the two sectors where working hours are longest, RMG and leather in Chattagram, overtime hours are paid as normal hours plus a premium, indicating an incentive for working long hours.

Figure 8: Percentage of workers receiving wage on time and paid in cash, by gender, age, sector and contract



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing overtime payment = 49 including don't know) <Nessun collegamento intersecante>

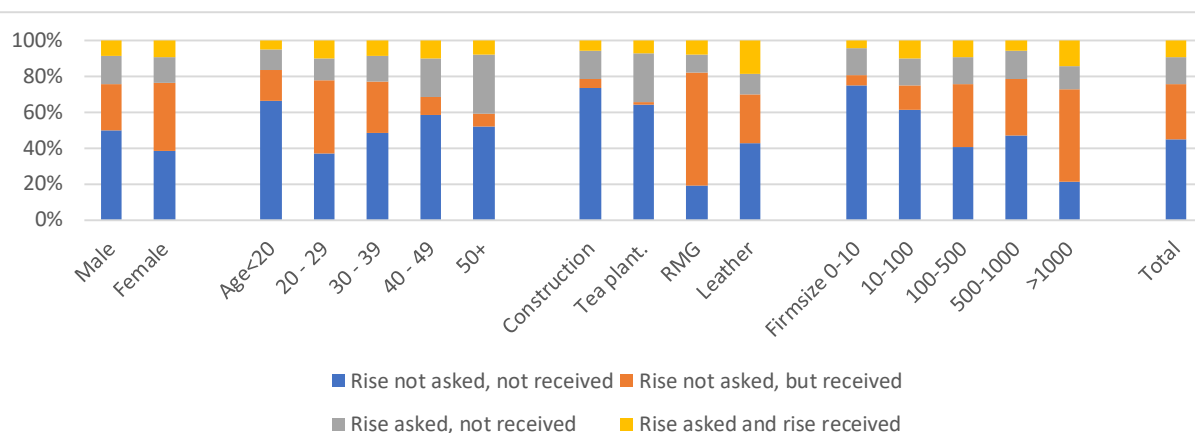
Wages on time and paid in cash

The survey asks workers whether they had received their last wage on time. The answers depict that wage arrears hardly exist in any of the four sectors studied (see Figure 8). Only 1% reports receiving their wage not on time.

The Minimum Wage Law of 2013 states that any remuneration must be paid in the legal

procedures and in some cases by electronic transfer to the bank account of the worker or by any other digital means.² The survey contains a question whether the workers received their wage cash in hand or by a bank account. Eight in ten workers receive their wage in cash (see Figure 8). This applies to male and female workers equally. Workers aged 20-29 and 30-39 years receive their payment in cash least compared to the other age groups. Payment in cash is particularly reported in construction

Figure 9: Distribution over asking for a pay rise and receiving a pay rise, by gender, age, sector and firm size



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing asking pay rise = 9, receiving pay rise = 10)

1 See <https://mywage.org.bd/labour-laws/work-and-wages>

and tea gardens and estates, and less often in RMG and leather. Finally, the smaller the firm, the more often payment is received in cash.

Pay rises

For employees the survey includes two questions about pay rises: whether they had asked for a pay rise and whether they had received a pay rise, both in the past 12 months. Figure 9 shows that almost half of the workers has not received a pay rise and has not asked for it. Three in ten has received a pay rise without asking so. More than one in ten has asked for a pay rise but has not received one, and slightly less than one in ten has asked for a pay rise and has received it. The workers who asked for a pay rise slightly less often also have received a rise compared to the employees who did not ask that.

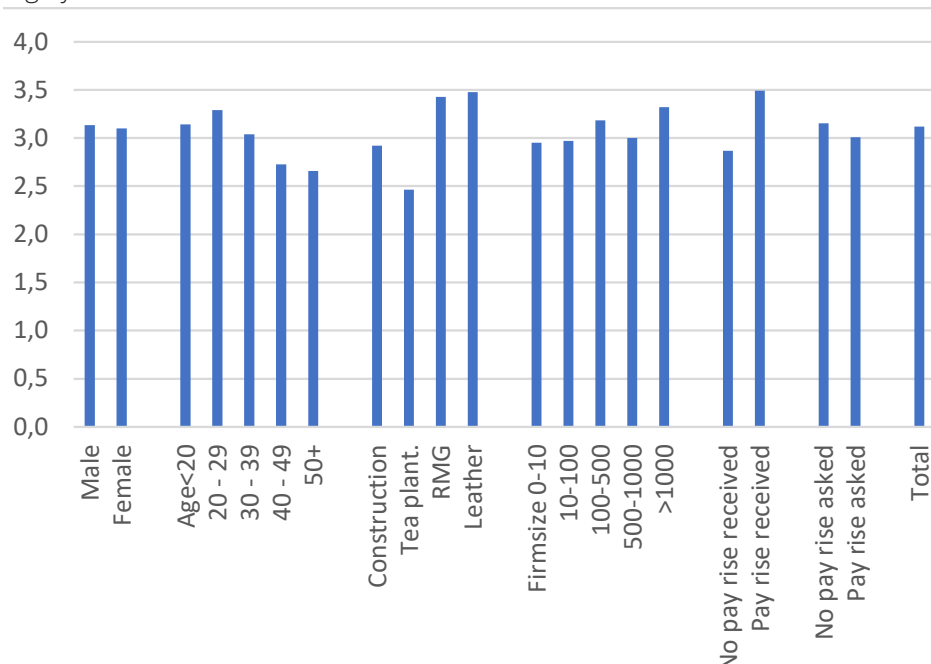
Figure 9 shows that compared to the male workers female workers more often received a pay rise without having asked for it. Workers aged 20-29 more often have received a pay rise without having asked for it compared to other the age groups, workers in RMG received

more often a pay rise without having asked for it compared to the other sectors, and workers in large enterprises received more often a pay rise without having asked for it compared to smaller enterprises.

Satisfaction with pay

The survey has a question: "How satisfied are you with your pay?". The answers to the questions range from highly dissatisfied (=1) to highly satisfied (=5). On this scale, wage satisfaction is with 3.1 almost exactly in the middle. Figure 10 shows that male and female workers are about equally satisfied, that workers aged 20-29 are more satisfied than other age groups, that workers in RMG and leather are more satisfied than workers in construction and tea gardens and estates, and that firm size not really impacts the satisfaction with pay. The figure shows also, not surprisingly, that the workers who have received a pay rise are more satisfied than those who have not. Workers who have asked for a pay rise are less satisfied compared to those who haven't done so. Both results are statistically significant.

Figure 10: Average satisfaction with pay, ranging from 1 = highly dissatisfied to 5= highly satisfied



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing cases pay satisfaction = 3)

4 LIVING WAGES IN BANGLADESH

Introducing the concept of Living Wages

The WageIndicator Living Wage aims to indicate a wage level that allows families to lead decent lives at minimum. It represents an estimate of the monthly expenses necessary to cover the cost of food, housing, transportation, health, education, water, phone and clothing, with a 5% margin for other expenses. The prices of these items are collected by means of a **Cost-of-Living Survey** in relatively low income setting. The survey has questions about the prices of approximately 80 food items, and these are adapted for country-specific consumption patterns. Appendix 3 shows the **Cost-of-Living Survey** used in Bangladesh. In this survey the prices of 61 food items were measured, as items that were not sold in Bangladesh were skipped. To calculate how much a person has to pay for its daily food requirements, the food-basket is equalized to 2,100 calories per person per day, being the nutritional requirement for good health proposed by the World Bank. The calculation assumes that all foods are prepared at home and that ingredients are purchased from supermarkets or markets at lower-range prices. Children are assumed to have the same food requirements as adults. For the Living Wage calculations, the **Cost-of-Living Survey** requires for each of the 61 food items at least 33 observations, hence totalling to 2,013 price observations per region. For the four regions altogether, 19,252 prices were collected.

Housing costs are the most peculiar kind of costs because dwellings differ and local prices show a substantial variation. The calculation of housing costs should therefore take into account quality criteria and departs from a minimum acceptable housing quality (e.g.,

appropriate number of rooms, location). In the **Cost-of-Living Survey** survey respondents are asked about their house rents; they self-identify whether electricity, water, garbage collection, Internet, and taxes on housing are included in the reported rents. Respondents also indicate the size and location (inside or outside the city center) of their apartments or houses. Based on these characteristics the cost of a reference dwelling is predicted using state-of-art econometric tools. Transportation is an important cost for households because many people commute for work or travel for their daily activities, such as groceries or shopping. The assumption made here is that the living wage does not include the ownership of a motorbike or car and that families have to rely on other means of transportation. As public transport service is commonly available in most urban places, the price of a regular monthly pass is regarded as the transport cost for an adult. The average price of such a monthly pass is used as a meaningful approximation of transport costs, also for families in areas where no local public transport is available.

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Box 1 The Cost-of-Living Survey Research methods

Since 2014, WageIndicator Foundation has used the Cost-of-Living Survey to calculate Living Wages for a range of countries and regions within countries. WageIndicator runs this multi-lingual survey for 140 countries, including Bangladesh. The surveys are posted on WageIndicator's national websites and web visitors are invited to report prices. This approach does not necessarily result in sufficient price data for a country, let alone the regions within the country. For projects WageIndicator therefore relies on interviewers who enter prices as they observe them in shops or markets. In the three selected regions, namely Chattagram, Dhaka, and Sylhet, as well as in a fourth region Rajshahi, a Cost-of-Living Survey has been conducted.

BIDS and WageIndicator identified a mix of big and smaller districts, including outskirts of cities, to be surveyed. The predetermined areas were not rural, but sub-districts were chosen within the districts so as to get respondents from lower-income group, and lower-middle income group as per the sampling plan (see Appendix 1). Food prices were collected by interviewers visiting shops and market places. The cost of housing and transport was asked to respondents, who were beforehand asked to ensure that they met at least one of the three criteria for categorizing them as lower-income or lower-middle income. First, the respondent had to reside in a 'semi-paaka' or 'kaacha' house - which means the house may have a tin-roof/wall, or unfinished floor or wall. Second, the respondent used shared toilet facilities with another family or household. Third, the respondent had no electricity connection. The respondents were also called at random from BIDS to check.

After having received a training, between 20th August and 1st September 2020 two BIDS teams of each 5 interviewers and one supervisor performed the data collection using tablets. The interviewers and supervisors were given a BIDS contract for the project. The supervisors and some of the interviewers had worked for BIDS before on other projects. The supervisors had extensive experience in their line of work. The COL data collection was completed in all areas before the wage survey started.

Cost of living for various households

The prices of food, housing and transportation are entered into the WageIndicator Living Wage calculation for several household situations. Three household types are defined, namely a one-person household, a standard 2+2 family composed of two working adults and two children, and a typical family. The typical family reflects the most common family composition in a country, because the number of children is based on the national fertility rate and because it assumes that one adult is employed full-time and that the employment rate of the other adult is derived from the national employment rate. Finally, the living wage

calculation assumes that adults are of economically active age and competent to manage their family budget efficiently. It is also assumed that all household members are in a good health. In Bangladesh work intensity in a typical family is 1.58. It means one parent is assumed to work full-time, and the work intensity of the other parent is 58%. In the case of Bangladesh, no tax payment is counted, so the net and the gross Living Wages coincide.

The Living Wage graphs for the four regions in Bangladesh include the monthly Minimum Wage, the monthly Living Wage for all three household types, as well as the monthly earnings of the most common type of worker in the *Wages and Work Survey Bangladesh*, namely the semi-skilled worker. The levels of the

monthly earnings are presented for the 25th, the 50th and the 75th decile of the distribution of the earnings in this skill group. Thus, if for example the earnings of 100 workers were ranked from low to high, the figures in the next sections show the earnings of the 25th, the 50th and the 75th worker. Chapter 5 of this report details the definition of a semi-skilled worker. The large majority of the workers in the *Wages and Work Survey 2020* is identified as semi-skilled.

Chattagram Region

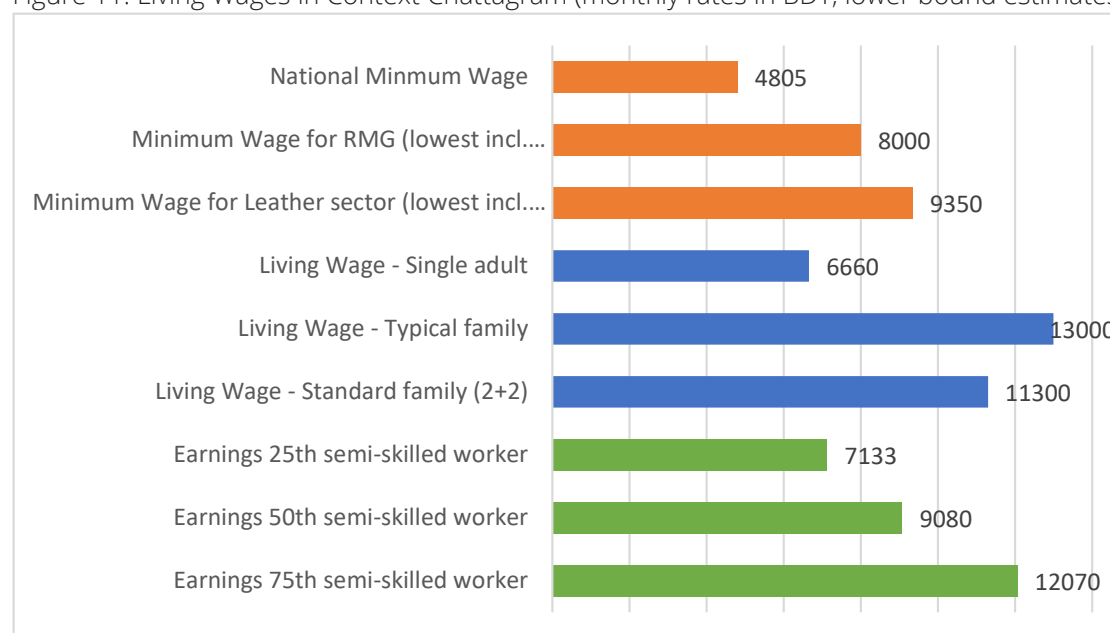
Based on the Cost-of-Living Survey 2020 in Chattagram the total income earned by both parents to cover the necessary family expenditures is BDT 20,549 (Table 6). Hence, the living wage for a typical family is BDT 13,000 for a full-time working adult.

Table 6 Expenditure and Living Wage calculation for Chattagram (monthly rates in BDT, Sept-Oct 2020)

	Typical family	Standard family	Single - adult
	from - to	from - to	from - to
Food expenses	8,487 – 9,815	8,280 – 9,576	2,070 – 2,394
Housing expenses	7,470 – 8,500	7,470 – 8,500	3,220 – 3,760
Transport expenses	1,430 – 1,700	1,430 – 1,700	715 – 850
Healthcare expenses	484 – 664	472 – 648	118 – 162
Education expenses	878 – 1,313	836 – 1,250	-
Clothing expenses	648 – 820	632 – 800	158 – 200
Water expenses	103 – 115	100 – 112	25 – 28
Phone expenses	72 – 110	72 – 110	36 – 55
Other expenses	979 – 1,152	965 – 1,135	317 – 372
Total Expenditure	20,549 – 24,189	20,257 – 23,831	6,659 – 7,821
Net Living Wage	13,006 – 15,309	11,254 – 13,239	6,659 – 7,821
Gross Living Wage (rounded)	13,000 – 15,300	11,300 – 13,200	6,660 – 7,820

Source: Bangladesh Cost-of-Living Survey 2020, selection Chattagram

Figure 11: Living Wages in Context Chattagram (monthly rates in BDT, lower bound estimates)



Source: Bangladesh Cost-of-Living Survey 2020 and Wages and Work Survey 2020, selection Chattagram

Figure 11 shows that the earnings of the 25th semi-skilled worker in Chattagram are sufficient to meet the living wage level of a single adult, but not for a standard 2+2 family or a typical family. The earnings of the 50th semi-skilled worker are sufficient for a single adult and a standard 2+2 family, but not for a typical family. The earnings of the 75th semi-skilled worker are sufficient for a single adult, a standard 2+2 family, and a typical family. The current Minimum Wage is below the earnings of all three types of semi-skilled workers.

Dhaka Region

Based on the Cost-of-Living Survey 2020 in Dhaka the total income earned by both parents to cover the necessary family expenditures is BDT 22,673 (Table 7). Hence, the living wage for a typical family is BDT 14,400 for a full-time working adult.

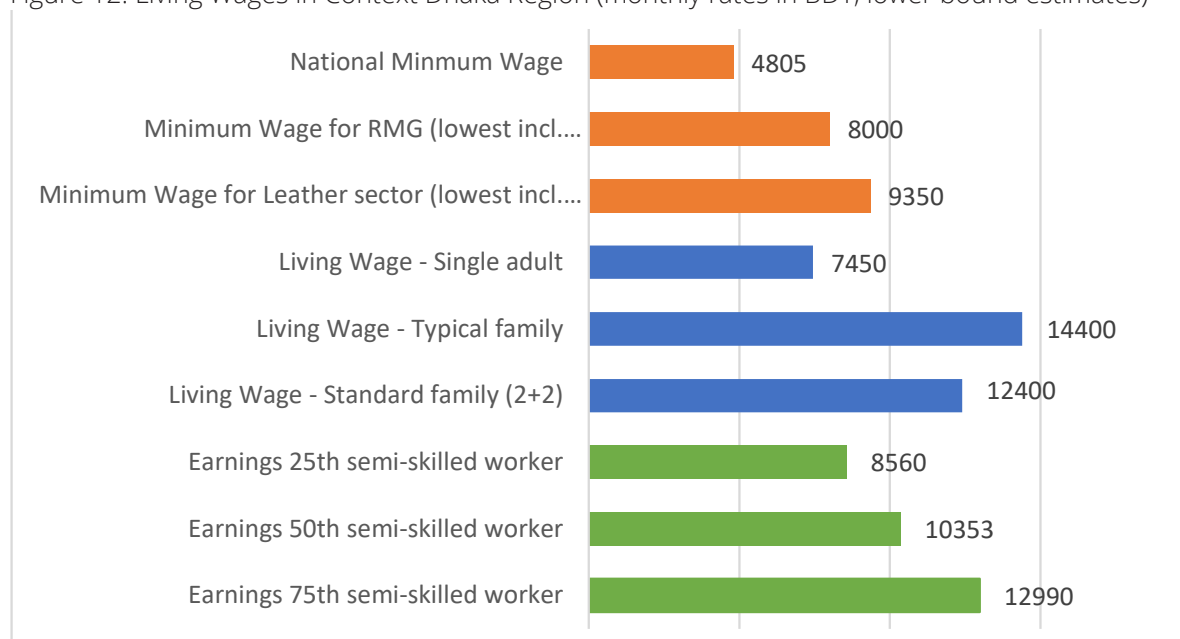
Figure 12 shows that the earnings of the 25th semi-skilled worker in Dhaka Region are sufficient for the living wage level of a single adult,

Table 7 Expenditure and Living Wage calculation for Dhaka (monthly rates in BDT, Sept-Oct 2020)

	Typical family	Standard family	Single - adult
	from - to	from - to	from - to
Food expenses	9,651 – 14,760	9,416 – 14,400	2,354 – 3,600
Housing expenses	8,380 – 10,400	8,380 – 10,400	3,760 – 4,490
Transport expenses	1,302 – 1,886	1,302 – 1,886	651 – 943
Healthcare expenses	484 – 705	472 – 688	118 – 172
Education expenses	983 – 1,796	936 – 1,710	0
Clothing expenses	545 – 869	532 – 848	133 – 212
Water expenses	172 – 250	168 – 244	42 – 61
Phone expenses	76 – 114	76 – 114	38 – 57
Other expenses	1,080 – 1,539	1,064 – 1,515	355 – 477
Total Expenditure	22,673 – 32,319	22,346 – 31,805	7,451 – 10,012
Net Living Wage	14,350 – 20,455	12,415 – 17,669	7,451 – 10,012
Gross Living Wage (rounded)	14,400 – 20,500	12,400 – 17,700	7,450 – 10,010

Source: Bangladesh Cost-of-Living Survey 2020 and Wages, selection Dhaka

Figure 12: Living Wages in Context Dhaka Region (monthly rates in BDT, lower bound estimates)



Source: Bangladesh Cost-of-Living Survey 2020 and Wages and Work Survey 2020, selection Dhaka

but not for a standard 2+2 family or a typical family. The earnings of the 50th semi-skilled worker are sufficient for a single adult and a standard 2+2 family, but not for a typical family. The earnings of the 75th semi-skilled worker are sufficient for a single adult, a standard 2+2 family, and a typical family. Current Minimum Wage is below the earnings of all three types of semi-skilled workers.

Sylhet Region

Based on the Cost-of-Living Survey 2020 in Sylhet the total income earned by both paren-

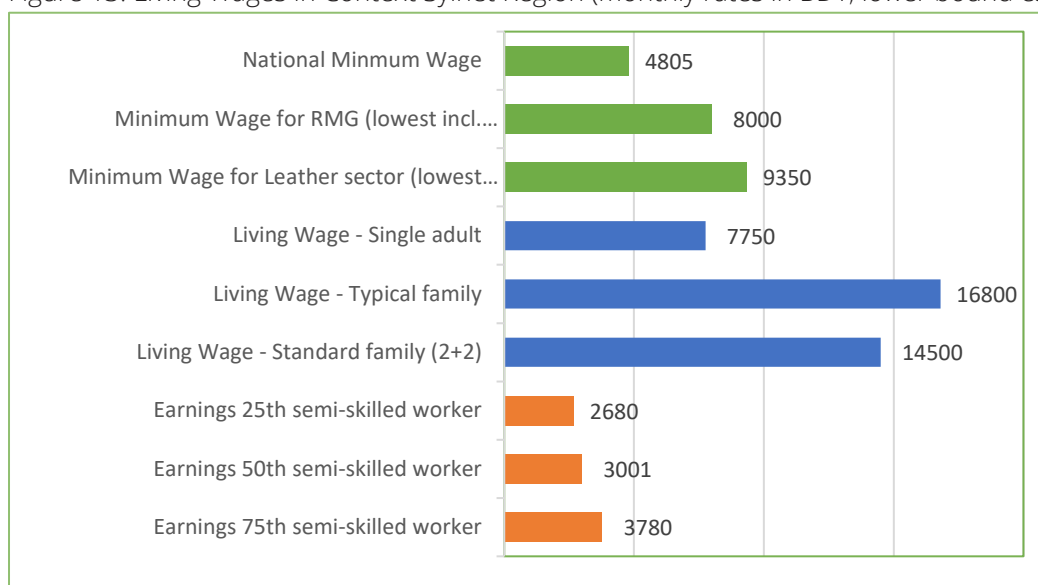
ts to cover the necessary family expenditures is BDT 26,517 (see Table 8). Hence, the living wage for a typical family is BDT 16,800 for a full-time working adult. Figure 13 shows that neither the earnings of the 25th, nor that of the 50th and the 75th semi-skilled workers in the Sylhet Region are sufficient for the living wage level of a single adult, let alone for a standard 2+2 family or a typical family. However, the reader should take into account that these earnings are primarily based on the wages in the tea gardens and estates, where employers provide non-monetary provisions such as housing and

Table 8: Expenditure and Living Wage calculation for Sylhet (monthly rates in BDT, Sept-Oct 2020)

	Typical family from - to	Standard family from - to	Single-adult from - to
Food expenses	12,931 – 14,272	12,616 – 13,924	3,154 – 3,481
Housing expenses	8,170 – 9,580	8,170 – 9,580	3,000 – 3,180
Transport expenses	1,666 – 2,200	1,666 – 2,200	833 – 1,100
Healthcare expenses	447 – 767	436 – 748	109 – 187
Education expenses	968 – 1,212	922 – 1,154	0
Clothing expenses	791 – 1,115	772 – 1,088	193 – 272
Water expenses	205 – 258	200 – 252	50 – 63
Phone expenses	76 – 116	76 – 116	38 – 58
Other expenses	1,263 – 1,476	1,243 – 1,453	369 – 417
Total Expenditure	26,517 – 30,996	26,101 – 30,515	7,746 – 8,758
Net Living Wage	16,783 – 19,618	14,501 – 16,953	7,746 – 8,758
Gross Living Wage	16,800 – 19,600	14,500 – 17,000	7,750 – 8,760

Source: Bangladesh Cost-of-Living Survey 2020, selection Sylhet

Figure 13: Living Wages in Context Sylhet Region (monthly rates in BDT, lower bound estimates)



Source: Bangladesh Cost-of-Living Survey 2020 and Wages and Work Survey 2020, selection Sylhet

food. Nevertheless, the wages in Sylhet are insufficient for a living wage.

Rajshahi Region

From other sources WageIndicator had already collected price data through its Cost-of-Living Survey 2020 for a fourth region, Rajshahi. For Rajshahi the total income earned by both parents to cover the necessary family expenditures is BDT 21,954 (see Table 9).

Hence, the living wage for a typical family is BDT 13,900 for a full-time working adult. As

this region was not included in the *Decent Wage Bangladesh* project, no *Wages and Work Survey Bangladesh 2020* was conducted.

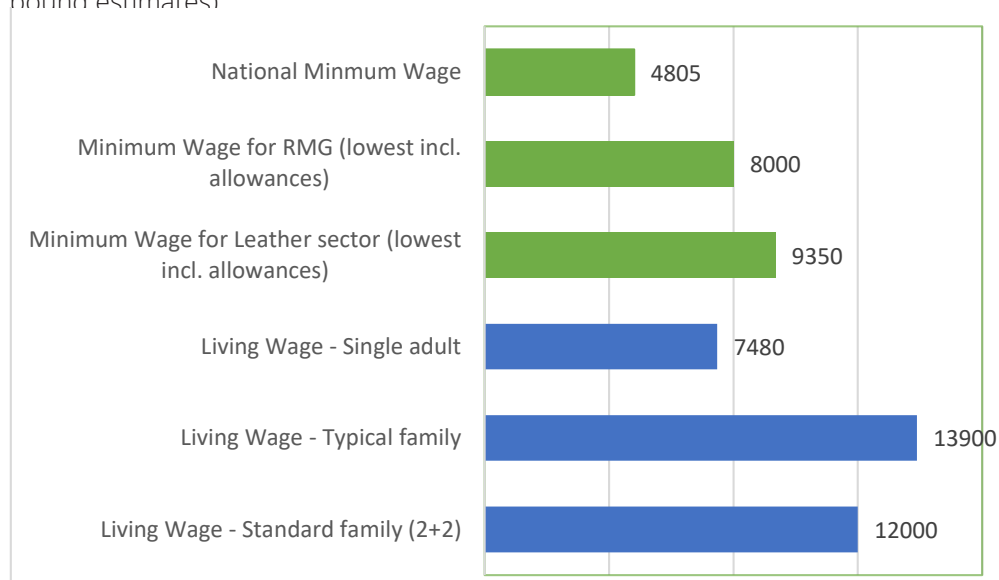
Figure 14 shows that the national Minimum Wage is not sufficient for the living wage level of a single adult in the Rajshahi Region, let alone for a standard 2+2 family or a typical family. The RMG Minimum Wage and the Leather Minimum Wage are sufficient for a single adult, but not for a standard 2+2 family and a typical family.

Table 9 Expenditure and Living Wage calculation for Rajshahi Region (monthly rates in BDT, Sep - Oct 2020)

	Typical family	Standard family	Single - adult
	from - to	from - to	from - to
Food expenses	8,934 - 10,336	8,716 - 10,084	2,179 - 2,521
Housing expenses	8,980 - 10,000	8,980 - 10,000	4,000 - 4,260
Transport expenses	1,500 - 2,000	1,500 - 2,000	750 - 1,000
Healthcare expenses	205 - 238	200 - 232	50 - 58
Education expenses	788 - 1,751	750 - 1,668	0
Clothing expenses	258 - 463	252 - 452	63 - 113
Water expenses	168 - 213	164 - 208	41 - 52
Phone expenses	76 - 116	76 - 116	38 - 58
Other expenses	1,045 - 1,256	1,032 - 1,238	356 - 403
Total Expenditure	21,954 - 26,374	21,670 - 25,998	7,477 - 8,465
Net Living Wage	13,895 - 16,692	12,039 - 14,443	7,477 - 8,465
Gross Living Wage	13,900 - 16,700	12,000 - 14,400	7,480 - 8,470

Source: *Bangladesh Cost-of-Living Survey 2020, selection Rajshahi*

Figure 14: Living Wages in Context Rajshahi Region (monthly rates in BDT, lower bound estimates)



Source: *Bangladesh Cost-of-Living Survey 2020, selection Rajshahi*

5 OCCUPATION AND EDUCATION

Box 2 - The Wages and Work Survey Bangladesh – Research methods

In the survey workers were asked what their job title was. For each sector, based on an extensive discussion between BIDS and WageIndicator, a predefined list of most common job titles was developed. The list consisted of 26 job titles in construction, 10 in tea, 21 in RMG, and 26 in leather and footwear. In case none of the titles was applicable, the interviewer could tick 'other'. The survey had also a question about the highest level of education achieved. Here the interviewer had to select the level from a list of 18 categories, ranging from 'no formal education' till 'masters/post graduate'. This Chapter reports the findings.

Occupation

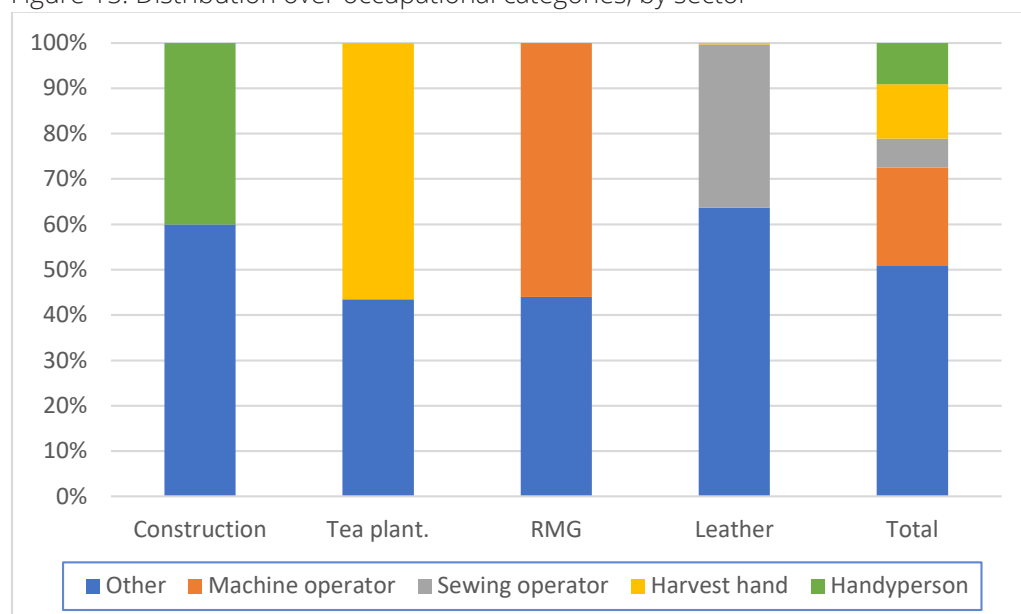
The job titles of all workers could be identified, except for 20 whose job title was not present in the list and hence fell in the 'other' category. Four job titles were most frequent, namely harvest hand in tea gardens and estates (227), handyperson in construction (173), sewing operator in RMG (120) and machine operator knitting in the leather and footwear industry (408 workers). Figure 15 shows that four in ten workers in construction are handypersons, almost six in ten workers in tea gardens and estates are harvest hands, almost six in ten in RMG are machine operators, and almost

four in ten in leather and footwear are sewing operators.

For the coding of job titles, we used ILO's International Standard Occupational Classification, called ISCO08. In ISCO08 occupations are classified by required skill level, comprising of four groups, namely unskilled, semi-skilled, skilled and highly skilled workers. The vast majority of the workers in the survey fall into the category semi-skilled (71%), followed by the category unskilled (28%). Only few skilled and highly skilled workers have been interviewed.

Very few workers report that they have a supervisory job. It is most often reported in the

Figure 15: Distribution over occupational categories, by sector



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, occupation missing 20).

construction sector and hardly in the tea gardens and estates. Related to the incidence of having a supervisory position in these sectors, male workers report this far more often than female workers, and so do workers in their thirties compared to other age groups.

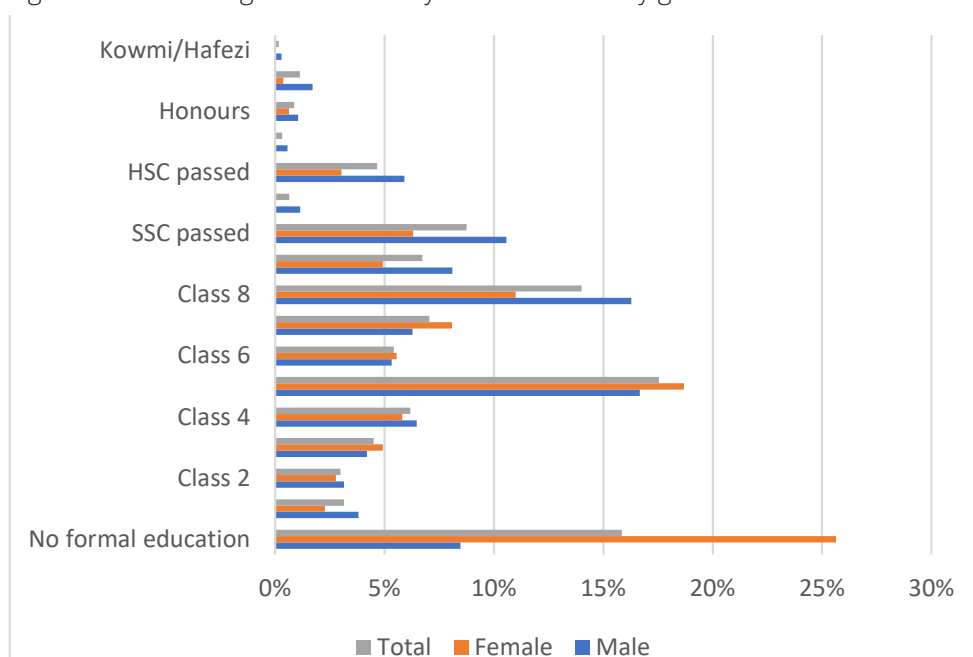
Education

Two in ten workers have no formal education or have only finished Class 1. One in six have finished Class 1 to 4, and one in six has a diplo-

ma of Class 5. Thus, half of the workers in the four sectors achieved at most primary education, which is Class 5 in the Bengali educational system. The remaining half has been educated beyond primary school. Two in six workers have a diploma of Class 6, 7, 8 or 9, and the remaining group have been educated for more years.

Female and male workers vary substantially with respect to their educational attainments (Figure 16). The gender difference is most

Figure 16: Percentage of workers by education and by gender



Source: *Wages and Work Survey Bangladesh 2020* (N= 1894, gender missing 6, education missing 0).

striking for the workers without any formal education. More than one in four female workers have no formal education, whereas for the male workers this is less than one in ten. Class 5 is more frequently attained by females, whereas males have more often attained Class 8, Class 9 or higher.

More than half of the workers in the tea gardens and estates have not attained any formal education, whereas in the three other sectors only a small minority of workers has so, as is shown in Figure 17. In construction almost half of the workers have finished Class 5, whereas in RMG one-third has done so and in textile one-quarter. In leather and footwear almost

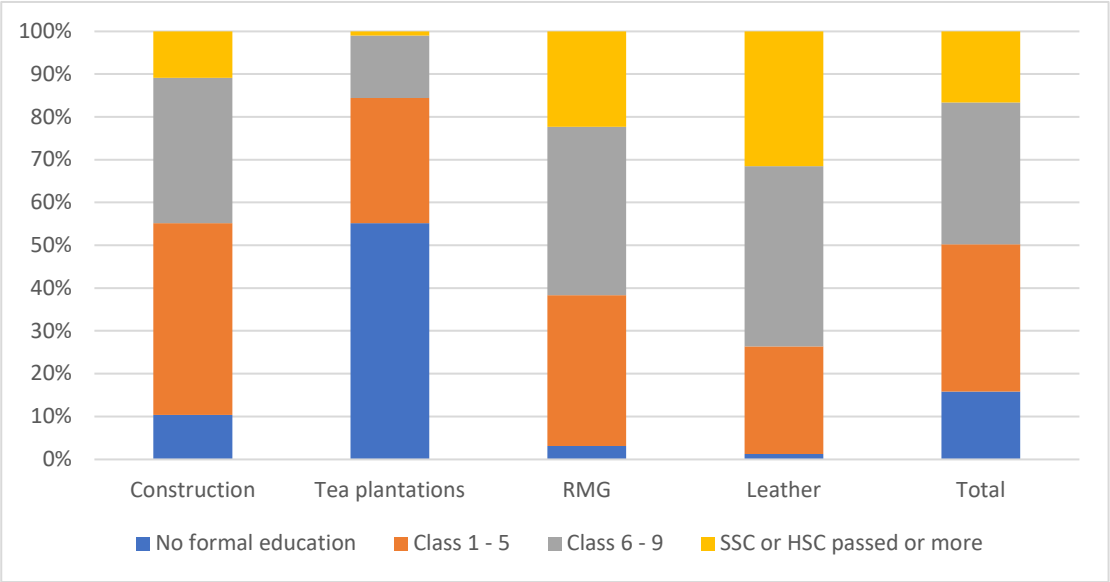
half of the workers have finished Class 9. In this sector the percentage of workers with a SSH or HSC diploma or more is highest compared to the other sectors.

Only a few years of education usually implies that workers have started their first job at a young age. For the male workers this is indeed the case. In construction, workers started a younger age than in the other sectors: they started their first job in majority at age 17. In the tea sector with its predominantly female workforce the pattern is different with an average age of 20 years for starting the first job. Almost half of them started their first job in their twenties and even in their thirties. Hence,

a substantial number of them entered a paid job only after setting up a family or working on their farm. In RMG, six in ten workers entered their first job at age 18 or younger, and four in ten did so in their early twenties. In leather and footwear, hardly any worker entered the

first job before age 15 and the majority entered between the ages 15 till 18. The remaining workers entered their first job between 19 and 27.

Figure 17: Percentage of workers in four educational categories by sector.



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, education missing 0).

6 WORKING HOURS

Box 3 The Wages and Work Survey Bangladesh – Research methods

The survey has several questions related to working hours, resulting in information regarding the number of working days per week, the contractual hours per week and the usual hours, as well as the paid annual leave. This Chapter reports the findings.

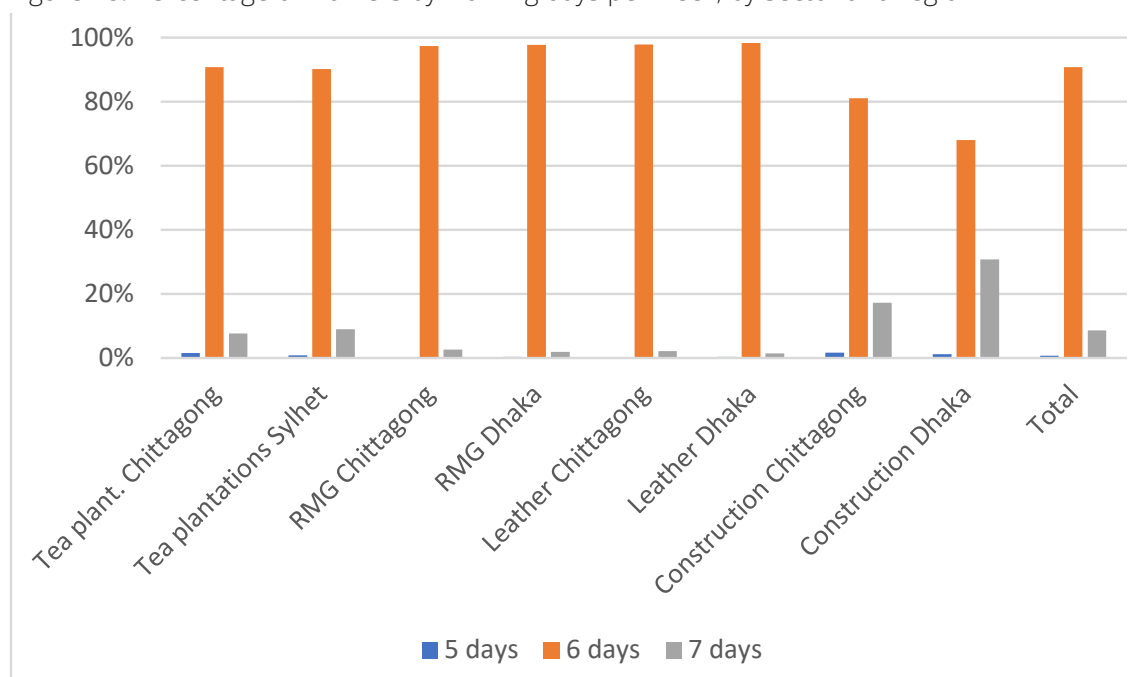
Working hours agreed

Almost all workers in the survey have their working hours agreed with their employer. Just over half of the workers have so in writing and the remaining group has working hours verbally agreed. Only a few percent of the workers have no hours agreed. Workers who work through an intermediary have agreed their hours in writing, whereas those without an employment contract have so verbally. All workers without agreed hours have also no employment contract.

Working days per week

On average the workers in the survey work 6.1 days per week. Nine in ten workers work six days a week, see Figure 18. Working seven days a week is done much more often by male workers than by female workers (13% of male workers and 3% of female workers). In tea gardens and estates a six-day working week is very common, though almost one in ten even works seven days a week. In RMG and leather almost all workers work six days a week. In construction the working week is longest. Two in ten workers work seven days per week.

Figure 18: Percentage of workers by working days per week, by sector and region



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing working days per week 2).

Working hours per week

By law, Bangladesh has a standard working week of 48 hours. The average contractual hours of the workers in the survey are however higher, namely 49.6 hours per week. This is specifically due to the construction sector, where workers on average have contracts for 52.4 hours in Chattagram and 53.5 hours in Dhaka. In contrast, with on average 46.9 hours per week, the contractual hours are lowest in the tea gardens and estates in Chattagram.

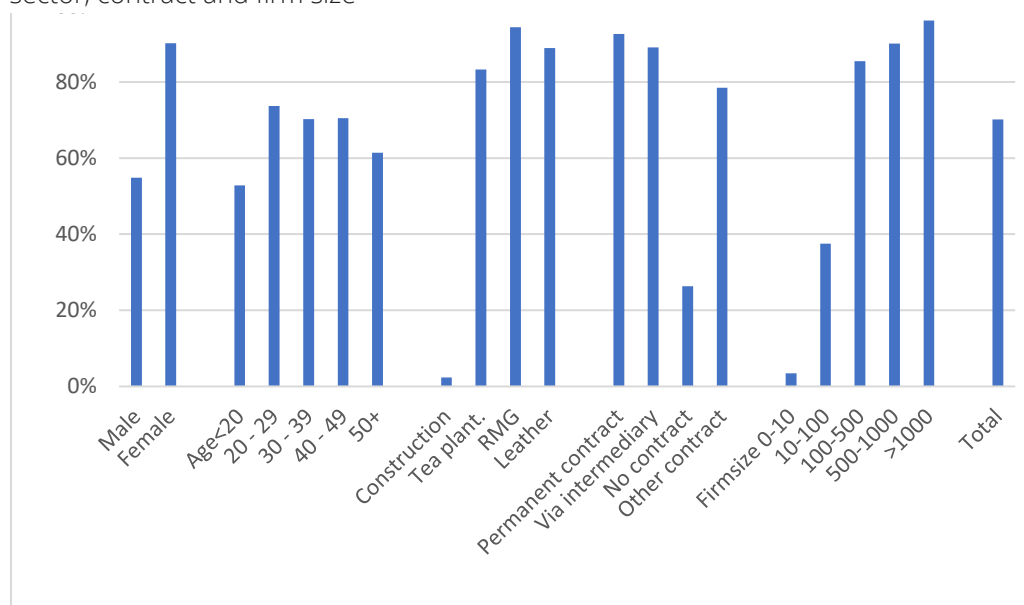
Being asked if they usually work the hours agreed in their contract, seven in ten workers say they do. Hence, this group has no overtime hours. Although the working week is long in the construction sector, workers in this sector hardly make overtime hours. Overtime hours are most often recorded in the RMG sector, particularly in Chattagram, where more than nine in ten workers report that they usually work more hours than contractually agreed. The workers indicating that they work more hours than agreed, have an average working week of 57.9 hours. Longest usual working hours are found in RMG and leather in Chattagram, up to almost 60 hours per week.

Working hours per year

The survey has no questions about the working hours per year, because workers would find them usually too difficult to answer. According to the Bangladesh Decent Work Check 2020¹, an adult worker is annually entitled to one day of paid leave for 18 days of work, though in the tea plantation this is one day of paid leave for 22 days of work.

The survey has a question about annual paid leave. Seven in ten workers report that they can take such a leave and female workers report so much more often than male workers (see Figure 19). Workers younger than 20 of age report so less frequently. Workers in construction hardly report so, but in the other three sectors more than eight in ten workers do. Workers without a contract report less often that they can take a paid annual leave, and so do workers in micro-enterprises and in small companies.

Figure 19: Percentage of workers that can take a paid annual leave, by gender, age, sector, contract and firm size



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing annual leave = 1).

¹See <https://wageindicator.org/documents/decentworkcheck/asia/bangladesh-english.pdf>

7 EMPLOYMENT CHARACTERISTICS

Box 4 The Wages and Work Survey Bangladesh - Research methods

The survey has several questions asking about the employment contract, the work experience and about promotion at the workplace. This Chapter reports the findings.

Four types of employment contracts

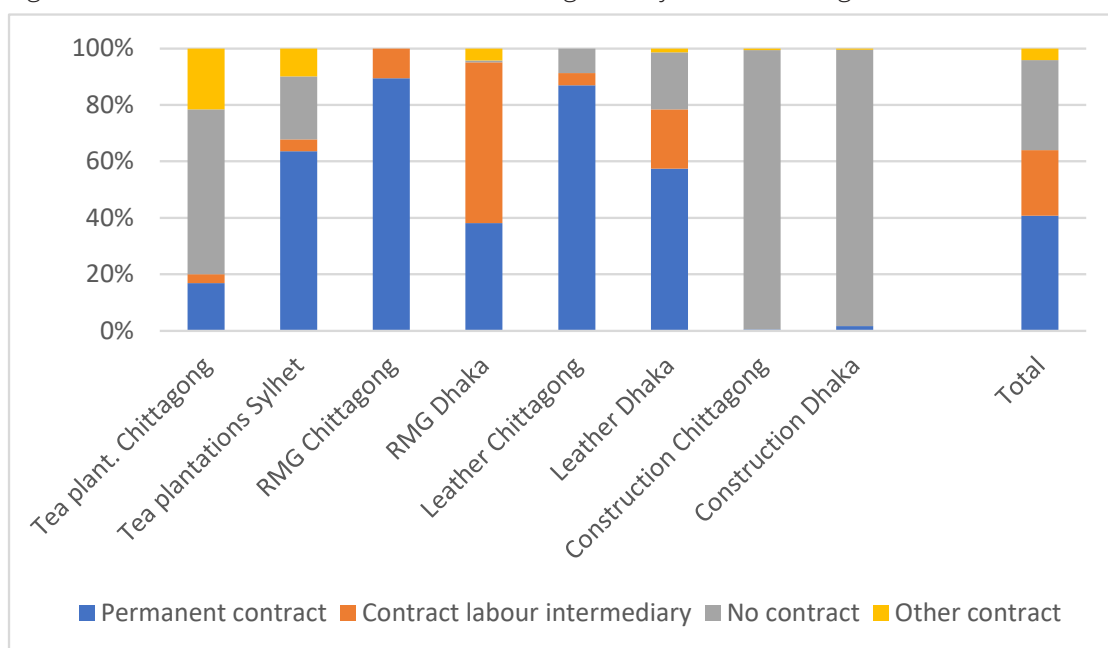
As detailed in Chapter 1, the survey allows to distinguish four types of employment contracts (see Figure 20). Four in ten workers have a permanent contract, more than two in ten are contracted through an intermediary, more than three in ten have no contract, and a small remaining group has another type of contract. Across the industries the contract categories vary widely and to a lesser extent they do as well across regions, as can be seen in the Figure. Whereas almost all workers in construction have no contract, in the leather industry workers have predominantly a permanent contract, specifically in Chattagram. In

RMG the workers in Chattagram mostly have a permanent contract, whereas in Dhaka this

is only the case for four in ten workers. RMG workers in Dhaka are in majority hired through a labour intermediary. Workers in the tea gardens and estates in Chattagram in majority have no contract, whereas in Sylhet they have in majority a permanent contract.

The answers on employment contracts can be broken down by gender, age, sector and firm size (see Figure 21). Female workers far more often than male workers have a permanent contract, whereas male workers far more often have no contract. Older workers more often have a permanent contract. In construction

Figure 20 Distribution over contract categories by sector and region



Source: Wages and Work Survey Bangladesh 2020 (N= 1894, missing cases for contract = 0)

almost all workers have no contract, whereas in tea gardens/estates, RMG and leather between four to six workers have a permanent contract. In tea gardens and estates three in ten have no contract, whereas in RMG contracts through an intermediary are common. The breakdown by firm size depicts that in enterprises with less than 100 employees it is common to have no contract, while in enterprises with more than 100 employees approximately half of the workers have a permanent contract.

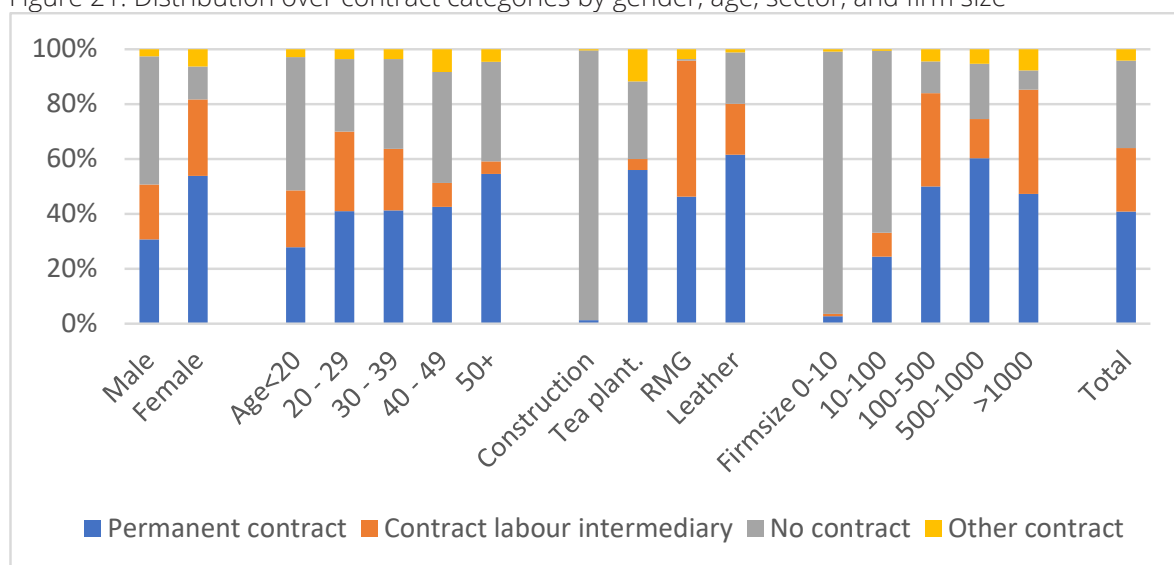
Years of work experience

On average, the workers in the survey have 11 years of work experience. Six in ten workers have less than 10 years of experience. Almost three in ten have been working between 10 and 20 years. The remaining group has been working for over 20 years. Male workers have

slightly more years of work experience than female workers. With on average 17 years of work experience, workers in the tea gardens and estates have the longest experience, whereas with 8 years RMG workers have the lowest.

The interviewed employees have been asked if they had been promoted in their current factory or plantation. Almost half of the employees say they have indeed. Not surprisingly, the workers with the most experience have most often been promoted. Workers in RMG and in Leather report much more often to be promoted than workers in tea gardens and estates and in construction. Male workers have slightly more often been promoted than female workers.

Figure 21: Distribution over contract categories by gender, age, sector, and firm size



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing gender = 6, age = 10, firm size = 2).

8 COVID-19 EXPERIENCES IN FOUR SECTORS

Box 5 Survey questions about absenteeism from work due to COVID-19

The planning of the project Decent Wage Bangladesh phase 1 was seriously hampered by the COVID-19 pandemic hitting Bangladesh. The Wages and Work Survey 2020 had to be postponed till September 2020, and it challenged the question how workers had been affected by the pandemic. For this reason, a set of questions about absenteeism from the job and the reasons for being so were added to the survey, followed by questions how the workers could cope with the related income losses. The survey contains another set of questions about the facilities at the workplace.

Absent from work due to COVID-19

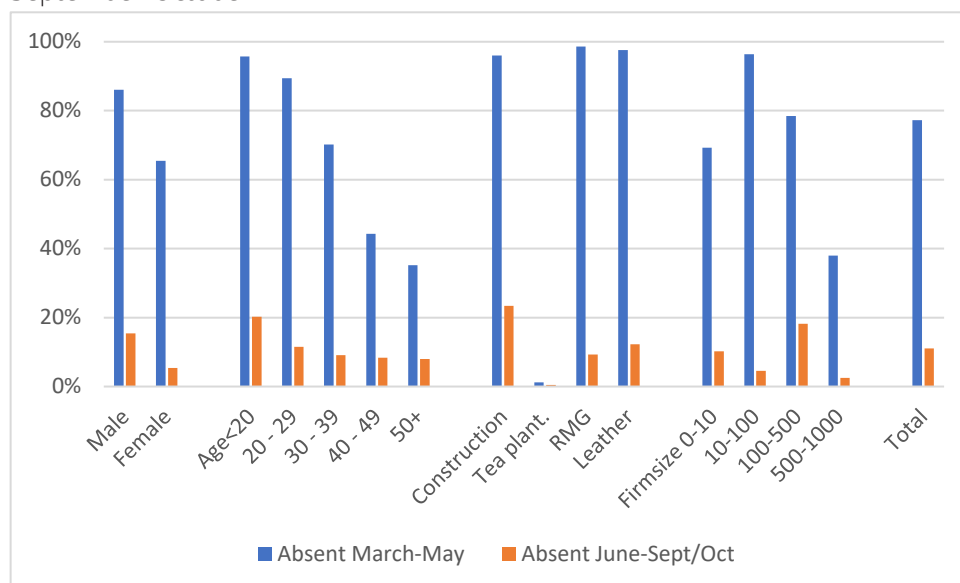
Absenteeism from work was very high in the first months of the pandemic, when the government ordered a lockdown for all industries. Almost eight in ten workers reported that they were absent from the job (Figure 22). After this first period, absenteeism tremendously dropped, namely from 77% in March-May till 5% in June-September.

Female workers were far less absent than male workers, and this is primarily due to the fact that the tea gardens and estates with their highly female workforce did not close. Almost all workers in construction, RMG and leather

reported that they were absent from work from late March to late May 2020.

Almost seven in ten absent workers were so because their workplace was closed, four in ten suffered area-based government restrictions, three in ten were confronted with the unavailability of transport to and from the workplace, and one in ten was called by their employer not to go to the workplace considering the risk of infection. Most absent workers report one reason, some mention two reasons and a very few three or four reasons. Absence because of sickness of family members or oneself was hardly mentioned as a reason to be absent from work.

Figure 22: Absenteeism from work from late March – late May and from June – September/October



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing March-May = 7, June-Sept/Oct = 22)

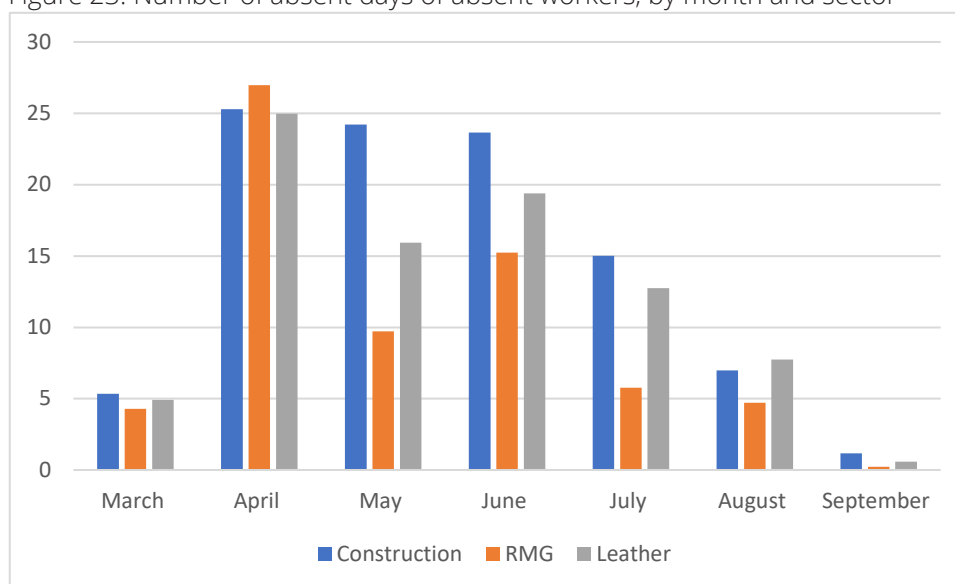
Absent working days due to COVID-19

In April 2020 the workers labelled absent were almost all working days in this month absent, as Figure 23 shows. In construction the number of absent days remained high in May and June, dropped little in July and more so in August. RMG and leather reveal a different pattern. After April the number of absent working days dropped steep in May, to rise in June and drop again in July and more so in August. Compared to RMG, the number of absent days was higher in the leather industry between March and August, with the exception of April when absent days in RMG were just over those in leather. By September the number of absent days had dropped to almost zero in all three sectors.

size. Wage reduction has been applied equally across the various groups. The wage reduction was primarily due to closure of the factory, and only to minor extent because the worker's working hours were reduced. Workers also report that they face reduced earnings because they no longer could work overtime hours.

The workers who faced reduced earnings were asked how they could cope with this (Figure 24). Only a small minority reports to have received cash assistance from the government or from non-governmental institutions (both 4% of those who faced wage reduction). Over two in ten report having received food distribution of the government, and less than one in ten received rations from the employer. A substantial share of the workers with reduced wages borrowed from family or friends (66%), another two in ten borrowed from a micro-finance institution and just over one in ten

Figure 23: Number of absent days of absent workers, by month and sector



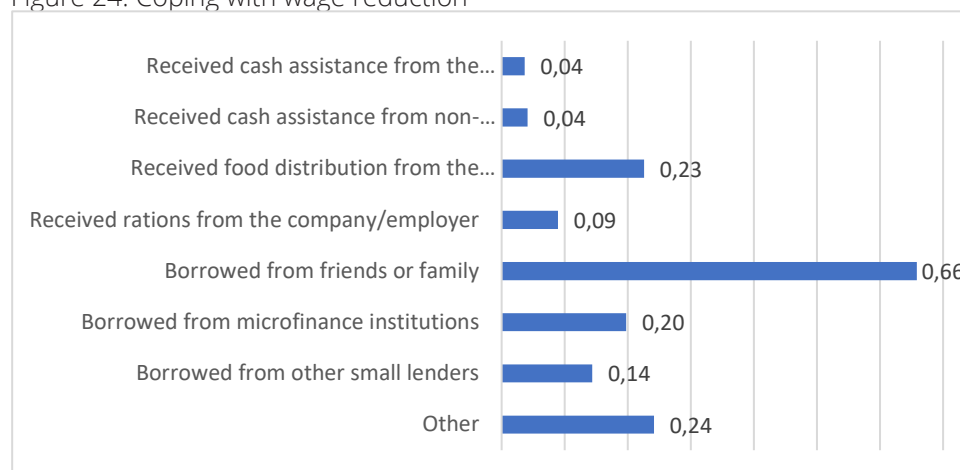
Source: *Wages and Work Survey Bangladesh 2020 (Selection: Absent workers in three sectors, N=1405 for March-May and N=204 for June-Sept/Oct)*

Reduced wages

Did the workers experience reduced wages as a consequence of COVID-19? This question has been asked to all workers, regardless whether they had been absent. The workers who had not been absent hardly experienced a wage reduction, but almost all workers who had been absent faced a wage reduction (83%). Only a few differences can be detected here regarding gender, age, sector, contract or firm

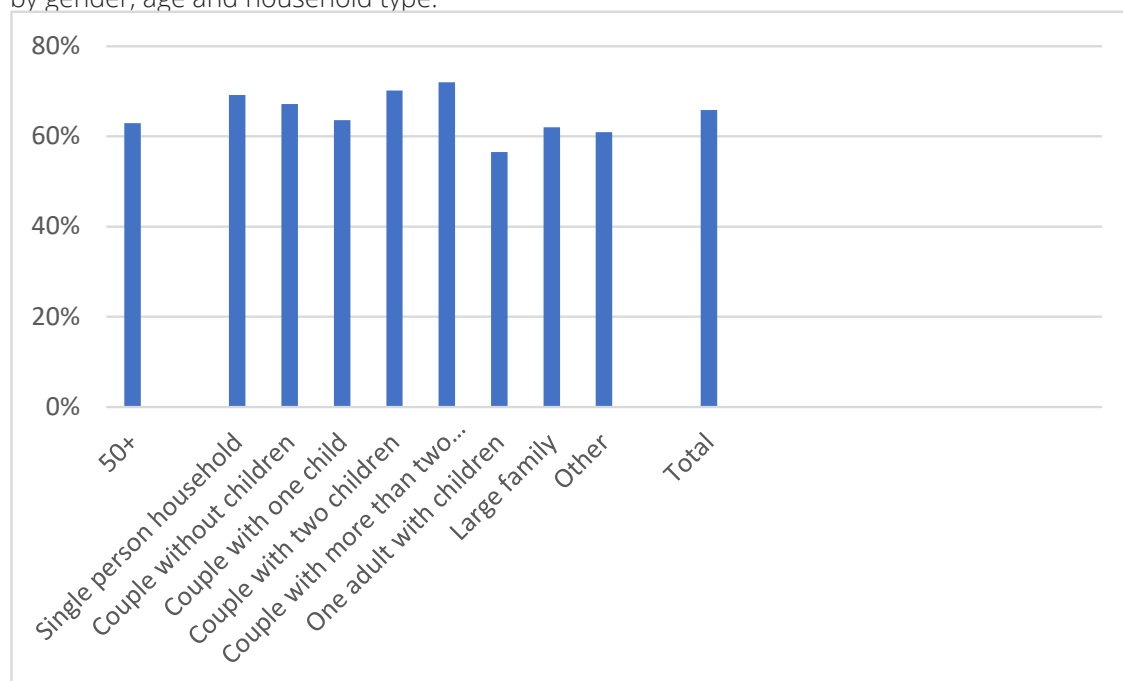
borrowed from other small lenders. Which workers borrowed from family or friends? Male workers have done so more often than female workers, workers aged 40-49 more often compared to other age groups, and couples with more than two children have done so slightly more often than other household types (see Figure 25).

Figure 24: Coping with wage reduction



Source: Wages and Work Survey Bangladesh 2020 (Selection: Only workers who reported a wage reduction N= 1195)

Figure 25: Percentage of workers with wage reduction who borrowed from family or friends, by gender, age and household type.



Source: Wages and Work Survey Bangladesh 2020 (Selection: Only workers who reported a wage reduction N= 1195)

Hygiene at the workplace

A final set of questions related to the hygiene at the workplace. Were COVID-19 risks involved? Questions asked about safe distances, independent work stations and washrooms (Figure 26). Workers are most positive about the safe distance or space in dining seating areas (56% assesses this as a low risk), followed by the independent use of all work equipment, as opposed to shared (46% assesses this as a low risk). Workers were least positive about a safe distance between work stations and number

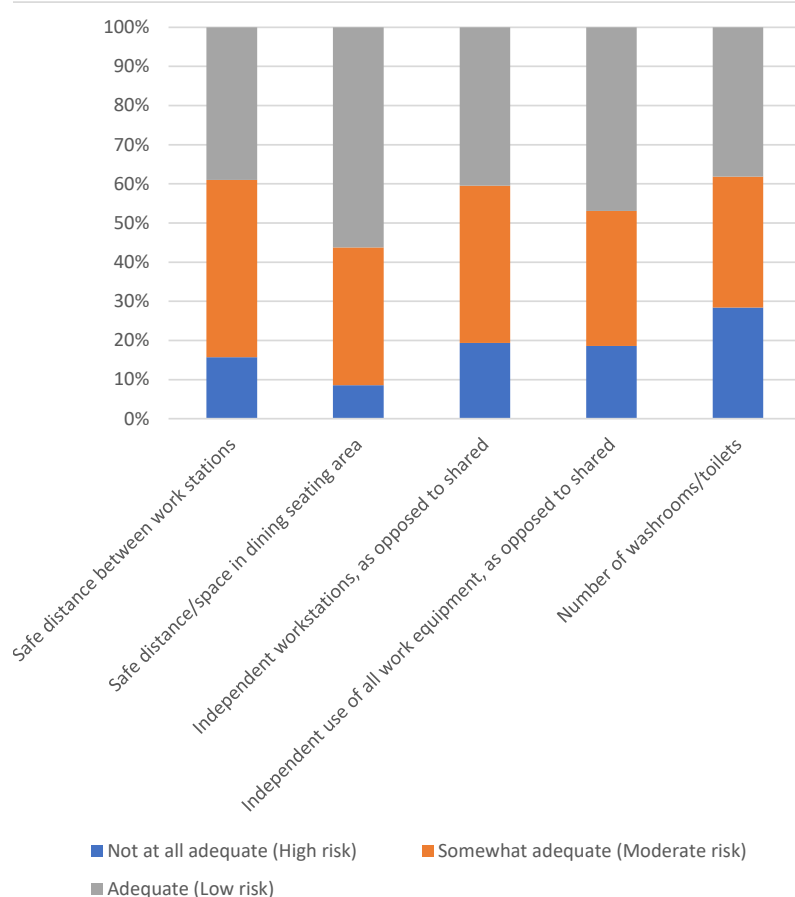
of washrooms/toilets (39% respectively 38% sees this as a low risk). Over two in ten workers assess the number of washrooms/toilets even as a high risk.

A second set of questions asked workers to assess the adequacy of supply of five hygiene facilities (Figure 27). Handwashing facilities are by a large majority of the workers assessed as adequate with a low risk. In contrast, gloves were certainly not adequately supplied, as more than seven in ten workers state that these are not adequately supplied.

Box 6 Interviewers' experiences

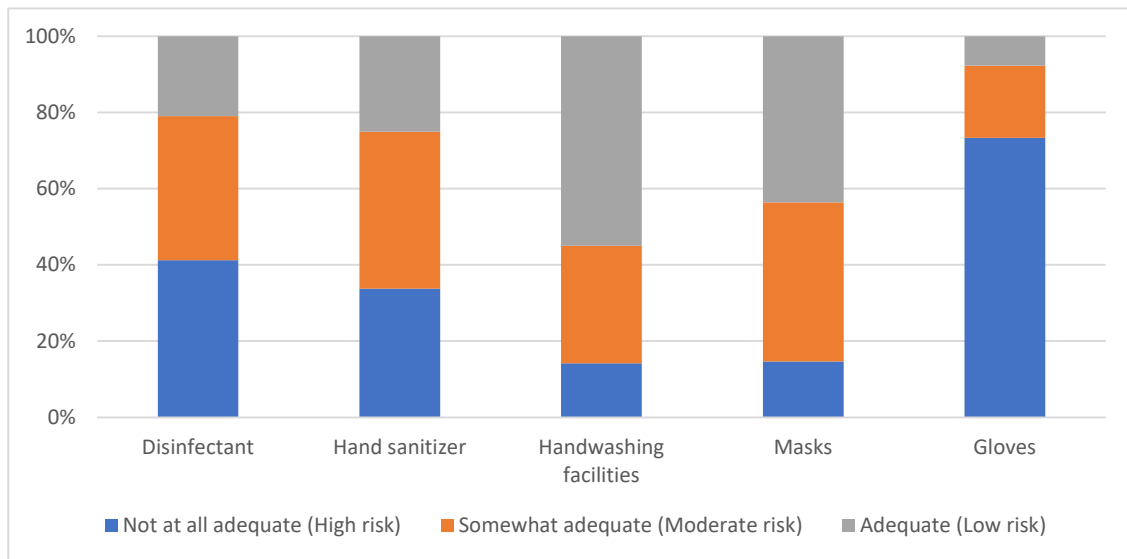
Tea garden workers usually do not wear masks. If visitors wear masks, workers think that the visitors are infected with COVID. This perception is actually common in other rural areas where people usually do not wear masks. Many RMG factories were seen to have taken steps against COVID such as installing handwashing facilities. One factory had about 200-300 taps installed and had hand-sanitizers, soap, masks, and temperature-checks for workers. Two or three other factories also had good hygiene facilities for workers. One of the teams found many RMG workers to be more aware and wearing masks. Yet, another team found that safe distancing and hygiene protocol were impossible to maintain in many factories due to small spaces and nature of work.

Figure 26: Risk assessment of adequacy of supply of five categories of measures



Source: *Wages and Work Survey Bangladesh 2020* (N= 1894, missing Disinfectant =16, Hand sanitizer=18, Handwashing facilities=13, Masks=14, Gloves=136)

Figure 27: Risk assessment of adequacy of supply of five hygiene facilities



Source: *Wages and Work Survey Bangladesh 2020* (N= 1894, missing Disinfectant =16, Hand sanitizer=18, Handwashing facilities=13, Masks=14, Gloves=136)

9 HOUSEHOLD COMPOSITION AND INCOME

Box 7

The Wages and Work Survey Bangladesh – Research methods

The survey has several questions asking about the household of the worker. Did he or she lived with other people in a household and if so, with how many? And were children or stepchildren living in the household? And how many persons in the household contributed to the household income? This Chapter reports the findings.

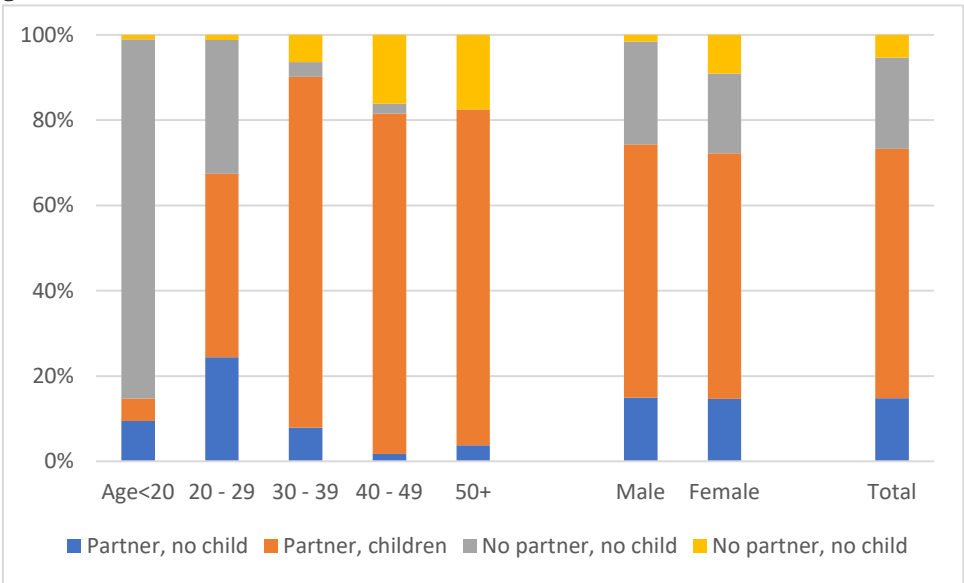
Living with partner and children

As Figure 28 shows, almost six in ten workers live with a partner and one or more children. Workers aged 30 or older live this way much more often than younger workers. Two in ten workers have no partner and no child. Not surprisingly, for young people this is more often the case than for older workers. One in twenty workers live with one or more children but no partner, and more so for workers aged 40 or.

Household size

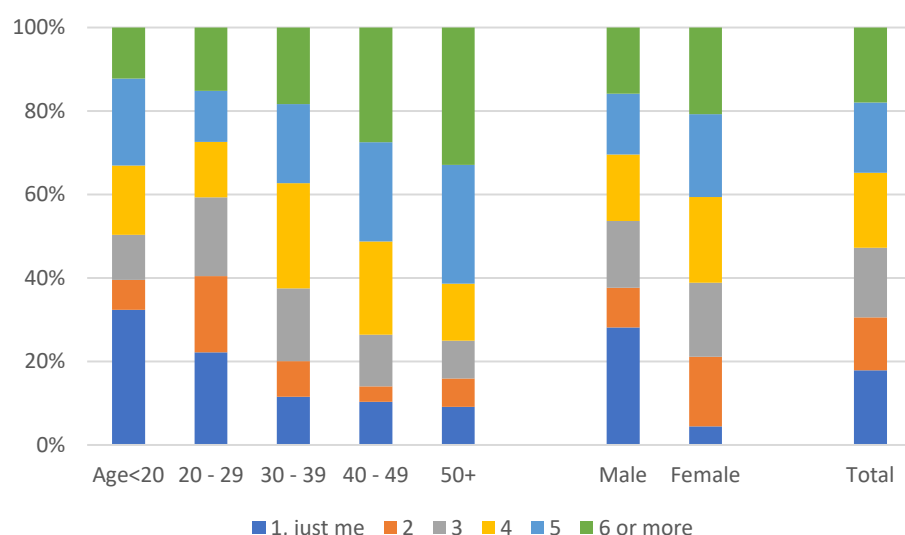
The workers in the survey live in households with on average almost 3.6 members, including themselves. Figure 29 shows that almost two in ten workers live in a single-person household (see bar total: 18%). Approximately six in ten workers live in households with two to five persons. Almost two in ten live in a household with 6 members or more (18%). Large households are specifically common among people aged 40 and over. Male workers live far more often than female workers in a single-person household.

Figure 28: Distribution over household composition, break down by age group, gender and total



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing age =10, gender=6, household members=8)

Figure 29: Distribution over household size, break down by age group, gender and total



Source: Wages and Work Survey Bangladesh 2020 (N=1894, missing age =10, gender=6, household members=8)

Household income

The last questions in the survey targeted at the income of the household: "How many other people in your household have an income from work, benefits or other sources?". The answers show that almost three out of ten workers live in a household where they are the sole earner. More than four out of ten live in a household with two earners. The remaining three out of ten live in a household with three or more earners.

Sending monetary remittances to family members is part of the household expenditure, but is rare among the workers in the survey. Only one in 40 workers does so. Men send remittances more often than women, and workers

in their twenties and thirties do so more often than younger or older age groups. Workers in the Dhaka region send remittances to family, whereas this is not the case by workers in the Chattagram and Sylhet regions.

Receiving remittances from relatives abroad occurs far more often than sending remittances: one in 20 workers reports so, thereby contributing to the household income. Compared to female workers male workers do receive remittances more often. Workers aged over 50 report so more often than younger age groups, specifically compared to young workers. Compared to workers in the Chattagram and Sylhet regions, workers in the Dhaka region receive remittances more often.

10 MINIMUM WAGE

Minimum wage setting

In Bangladesh, as per the Minimum Wage Board Ordinance (1959), a separate Minimum Wage Act does not exist, but there is a specific labour act in place known as the Bangladesh Labour (Amendment) Act 2013. The Minimum Wage Board (MWB), constituted under that Act, is responsible for governing and deciding minimum wage rates. The procedure is that the government sets the Minimum Wage rates based on the recommendations of the Wage Board for certain industries and levels of skill. The Wage Boards are appointed by the government and comprise a chairman, one independent member as well as one representative each of employer and workers engaged in the concerned industry.¹

In making recommendations, the Wage Board considers the cost of living, quality of life, cost of production, commodity prices, business efficiency, inflation rate, economic and social conditions of the country and region and other relevant factors. If any of the above changes (within one to three years), the Minimum Wage Board will be obliged to amend those recommendations. The minimum wage rate of any industry can be revised by the government every five years. The minimum wage rate is determined on the basis of industry and is applicable to all concerned employers. Failure to pay the minimum wage to the workers is a punishable offense, punishable by one year of imprisonment or a fine.²

Basic wages plus allowances

The Minimum Wage Law (2013) defines minimum wage as the basic salary excluding pension and gratuity payments, social secu-

rity cash benefits, severance payments and allowances for travel, accommodation, meals, electricity charges, water service charges and duties, taxes, medical treatment and recreational purposes. The Minimum Wage at national level is 1,500 BDT, and this has not been changed since 2013.

Minimum Wage rates exist at industry specific levels and are further specified by job title and by skill level. The industry-specific Minimum Wage rates include the basic salary plus a house rent allowance, a medical allowance, a travel allowance, and in some cases a food allowance. A housing rent allowance depends on the basic rates. They are 50% of the basic wages in regional cities and 40% of the basic wages in other areas. The medical, food and transport allowances are the same amounts for all minimum wage categories within industries, but across industries these allowances vary. Jointly these allowances contribute largely to the basic wages. The basic wages are increased by a factor 1.5 till almost 2.0 in the total amount earned, as can be calculated from WageIndicator's Minimum Wage Database.

Minimum wages in the four industries

In November 2013, after widespread workers' protests, the government announced lifting the minimum wage for the RMG industry from BDT 3,000, agreed in 2010, to 5,300 per month from 1 December 2013. The basic minimum wage for a garment worker was set at BDT 3,000 with a 5% annual increment on the basic wage, 40% of the basic wage for house rent, BDT 250 for medical expenses, BDT 200 for transport and BDT 650 for food, jointly raising the total minimum wage to BDT 5,300. By 1

1 Source: <https://wageindicator.org/labour-laws/labour-law-around-the-world/minimum-wages-regulations/minimum-wages-regulations-Bangladesh>

2 This paragraph is based on <https://mywage.org.bd/labour-laws/work-and-wages1>.

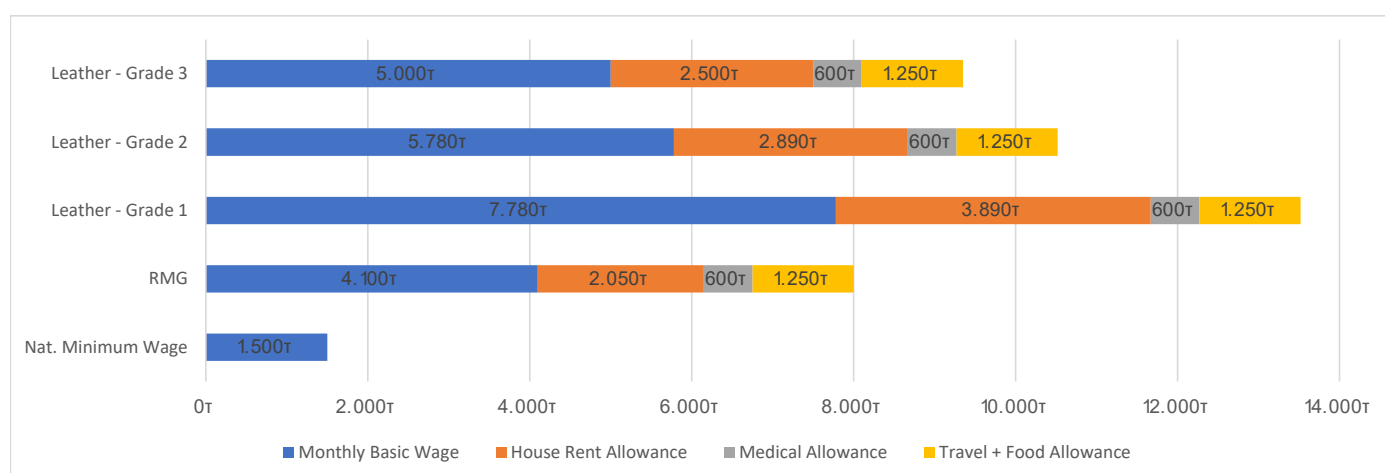
Box 8 Minimum Wages - Research methods

In October 2020 the BIDS team collected the latest Minimum Wage decisions of five WageBoards, namely Textile, Road Transport, Plastic, Rerolling mills, and Leather and footwear. The documents in PDF format were converted into an excel file, were translated, and added to WageIndicator's Minimum Wage Database. This database had already information about the Minimum Wage rates for the RMG industry. The data was used to compare the wages reported in the Wages and Work Survey to the applicable Minimum Wage rates. The data was also used to update the Minimum Wage pages in the Bangladesh website of WageIndicator, see <https://mywage.org.bd/salary/minimum-wage> and in English see <https://wageindicator.org/salary/minimum-wage/bangladesh>.

December 2018 the total monthly minimum wage was raised to BDT 8,000. Since, the rate has not been increased.

For the four industries in this report industry minimum wages are issued for RMG and leather, but not for tea and construction. WageIndicator's Minimum Wage database has industry-specific minimum wage rates for seven industries and these are available on its webpages in [English](#) and in [Bengali](#). As is the case in many other countries, minimum wages in Bangladesh are based on the concept of

skills, here for six of the seven industries but not for the RMG sector. The rates for Leather were revised as per 2 September 2020. Whereas RMG has one minimum wage rate, Leather has minimum wage rates for three skill levels, from the most skilled in Grade 1 to the least skilled in Grade 3. Figure 30 shows the total monthly rates for the national minimum wage at BDT 1,500, for RMG at BDT 8,000 and for Leather at BDT 13,520 for the most skilled grade and BDT 9,350 for the least skilled grade.



Source: WageIndicator Minimum Wages Database, October 2020

11 COLLECTIVE LABOUR AGREEMENTS

Collective bargaining in Bangladesh

Legally registered trade unions are entitled to bargain collectively with employers as a Collective Bargaining Agent (DTDA, 2020). According to DTDA, the law only allows wall-to-wall (entire factory) bargaining units. According to their annual reports, the Ministry of Labour and Employment (MOLE) registered six Collective Bargaining Agents in the fiscal year 2018- 2019 and 16 in the fiscal year 2017-2018. The application of Collective Bargaining Agreements (CBAs) is relatively new, and the number of CBAs is rising from 16 signed in 2017/2018 to 57 signed in 2018, and another six in 2018/2019 (DTDA, 2020). The Action, Collaboration, Transformation (ACT) initiative aims to promote social dialogue. Similarly, the Laudes Foundation initiated practical guidelines and examples to promote collective bargaining (Saltmarsh, 2019).

Number of CBAs collected and representativeness

As introduced in Chapter 1, the project *Decent Wage Bangladesh* aimed to contribute to the knowledge and research pathway and one of the five studies undertaken was an inventory of collective agreements. In 2020 BIDS team and WageIndicator collected CBAs from two sectors, namely 13 CBAs from the Leather sector and 14 from RMG. In the Construction sector CBAs were found to be non-existent, most likely due to the highly informal nature of the sector. CBAs are available in the Tea sector, but were not provided timely to the BIDS

research team despite assurance of sharing by the sector's trade union representative. The collected CBAs do not comprise all CBAs in the two sectors. For the Leather sector these are sectoral CBAs, but for RMG they are firm-level and only issue-specific, thus dealing with specific topics as is specified below.¹

For RMG and leather the CBA sample can be compared to the factories sampled in the *Wages and Work Survey 2020*. The CBAs in the leather sector are for the tanneries mainly within the Dhaka region, including Dhaka City and surrounding districts. No CBAs could be obtained for the Leather factories operating outside the Dhaka Division. The leather factories sampled for the *Wages and Work Survey 2020* were most in the Dhaka Division and included 80% of the leather factories from the Dhaka Division. Thus the collected tannery CBAs may be said to cover a large proportion, if not the majority, of all CBAs in the leather tannery sector. In RMG the sampling for the *Wages and Work Survey 2020* was similarly sampling a proportion of factories, and more than 84% factories were in Dhaka region. The collected RMG sector CBAs are also from Dhaka region, so these may also be said to cover a large proportion, if not majority, of CBAs in the RMG sector.

Coding and annotating of the CBAs

The coding/annotation of the CBAs in the WageIndicator's CBA tool called COBRA was done by the BIDS project team following detailed instruction from the WageIndicator team. The

¹ A total of 27 CBAs were collected, of which two Bengali ones were collected by WageIndicator and the remaining 25 were collected by BIDS. Two of the 27 CBAs were in English. Both were made with the company Apex Holdings Ltd. and were two separate agreements regarding two separate decisions on the concerned workers of the factory. A total of 25 CBAs are in Bengali and 2 in English.

Box 9 Collective Bargaining Agreements (CBAs) -Research methods

All the workers' federations listed in the Bangladesh-IndustriALL website were contacted by BIDS team over phone and email. Three federations managed to help provide the CBAs, namely Bangladesh Garments, Textile & Leather Workers' Federation (BGTWLF), Bangladesh Textile and Garments Workers League (BTGWL), and Tannery Workers Union. The President of BGTWLF visited the BIDS office with hardcopies of 6 RMG CBAs, five of which were made with individual companies/ factories, and one was made with the RMG industry association BGMEA and the Ministry of Labour and Employment regarding resolution of general worker grievances in Ashulia area of Dhaka. These 6 CBAs were allowed to be scanned (photographed) by BIDS. The President of BGTWLF also agreed to a short interview on the spot, explaining their activities and sharing brief background for some of their recent collective agreements.

BTGWL sent their CBA copies to BIDS in two rounds. In the first round they emailed copies of 4 of their RMG CBAs, and in the second round they emailed copies of 5 more RMG CBAs. Unlike BGTWLF, BTGWL did not have most of the digital copies with them, but had to collect them from their individual trade unions before emailing to BIDS. All the CBAs sent by them were photographs, which were retyped by BIDS.

The Tannery Workers Union was also reached through the IndustriALL website. Their CBAs were collected in three rounds, the first two rounds via email, and in the third round one of the BIDS-appointed supervisors for the wage survey visited the union office in Dhaka and got scanned copies of the CBA. The tannery CBAs proved to be a great help since only their CBAs were found to be full CBAs rather than factory-specific and issue-specific ones.

CBAs in Bengali were first typed in Microsoft Word using "Unicode" format, which enables character recognition on all platforms. These were then converted to HTML format by the WageIndicator team and uploaded to the server for annotation.

COBRA allows to code whether a topic is addressed in the CBA by answering questions in a questionnaire. The relevant text is then annotated by selecting the relevant clauses. In most cases, entire paragraphs had to be annotated mostly because the relevant sentences spanned most of the paragraph, but also because the entire paragraph needs to be read to understand the answers to the particular questions.

The CBA's can be viewed online at <https://mywage.org.bd/labour-laws/collective-agreements-database>

Appearance of CBAs and their signatories

The collected RMG CBAs, except for one (Romana Fashion), are all one-to-two page long and are on very specific matters for individual factories. Hence they do not have any renewal dates (except the one by Romana Fashion). The signatories of these CBAs are the factory/company representatives, the workers' representatives from the workers' federation or trade union, and in some cases some of the afflicted workers. Most of the collected CBAs which have worker signatories do not separately mention the names of the worker signatories, but include only their signatures.

In contrast to RMG the leather tannery CBA's are long-texts CBAs that include many of the provisions listed in the COBRA tool. These agreements are between a primary leather and leathersgoods exporters' association of

the country (BFLLEA), and the tannery workers union, and are renewed every two years. Such CBAs, including the signatories' names at the beginning as well as at the end of the document, are between 11-14 pages long. The RMG CBA for Romana Fashion as mentioned above resembles a more complete CBA and is effective for a 2-year time period, but is not as exhaustive as the tannery sector CBAs.

The Leather sector CBAs start from the year 2000 and are available till 2018. They are renewed every two years effective from January 1st of the year. The tannery CBA for 2020 had not been renewed as of the time of writing this report, although the demands had been submitted in writing by the union to the industry association in February 2020 (according to the union representative). Once the CBA is renewed, however, all agreements will be effective from January 1st, 2020, like the other renewals which are also signed at later dates but are effective from January 1st of the agreed year.

For the Tea sector in Sylhet there is one main trade union (similar to the tannery workers union in Dhaka), hence the Tea sector CBAs may be expected to be exhaustive CBAs. As said, the team could ultimately not obtain the CBAs upon multiple attempts of follow-up. But these CBAs may be expected to be received in future.

Topics included in the CBAs

For RMG CBAs, if the particular issue resolved through the CBA was wage-related then the clauses are included for paying all arrears from the specified date. For the tannery CBAs, wages are agreed-on in each renewal, including wages and increments for permanent and temporary workers, wages for newly hired permanent workers, wage breakdown for permanent workers, overtime and night duty wages. Although the date of signing of the CBAs (both for RMG and tannery) are later dates, the agreements state that the wages and arrears would be paid from the earlier date as agreed-on in the CBA.

Since the RMG CBAs are factory and issue-specific, they include topics such as the following:

- rehiring of workers released from work over specific issue,
- clearing termination pay for discharged workers,
- rehiring of pregnant women workers,
- re-opening of factories and maintaining peace and order after picketing,
- withdrawal of legal cases against picketing-workers by factory authority,
- non-discrimination toward earlier protesters or picketers once settlement has been signed,
- payment of all dues by the agreed-upon date(s), etc.
- The Leather tannery CBA topics usually include the following:
 - annual increment for permanent and temporary workers,
 - wage scale for newly-hired permanent workers,
 - wage breakdown for permanent workers including house rent, travel allowance, medical allowance,
 - night duty allowance,
 - overtime wage,
 - monetary allowance for snacks during work hours, and meal allowance,
 - severance pay, pay in lieu of notice, and provident fund,
 - annual bonuses and leaves,
 - making temporary workers permanent,
 - occupational health and safety, formation of safety committee, and payment/coverage of treatment costs or damages due to workplace injury,
 - facilities for female workers as per Labour law,
 - working hours,
 - leave for participating in trade union activities,
 - barring the use of child labour and contract workers, and
 - contribution to worker welfare fund.

Gender discrimination is found in daily wage increments of temporary workers for previous years of 2002-2008 (with the exception of 2004 which does not explicitly mention gender in the temporary workers' wage increment clause). For the years 2002, 2006, and 2008, female temporary workers received lower

daily wage increments compared to their male counterparts. For 2002 no wage increment amount was mentioned for female temporary workers but it was stated that their increment would be decided based on evaluation of their work. From 2010 onward, however, all temporary workers irrespective of gender receive equal daily wage increment.

Coverage by a collective labour agreement

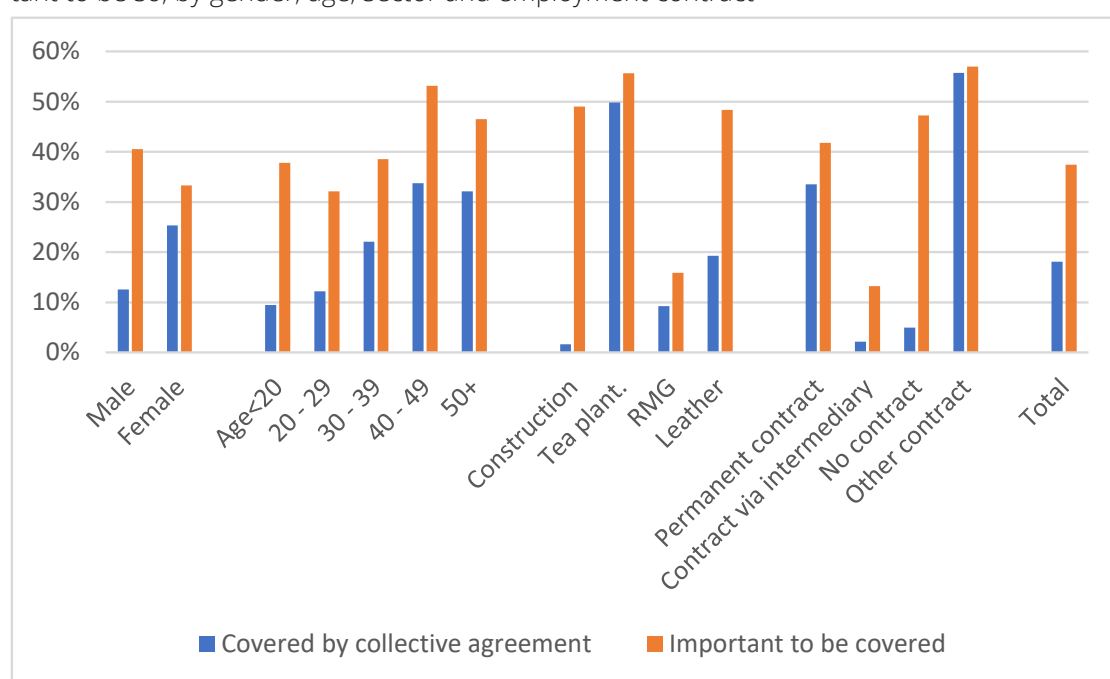
The *Wages and Work Survey 2020* had two questions about collective labour agreements. It was asked whether the worker was covered by an agreement and whether the worker thought it would be important to be so (see Figure 27). Almost seven in ten workers answer that they are not covered by an agreement. The remaining group equally answers that they are covered, or they don't know an answer to this question. Hence, in 2020 in the four sectors the coverage rate is 18% for all surveyed workers and 34% for those with a permanent employment contract. For an impression of the developments over time, in its Social Dialogue Indicators study the ILO estimated the collecti-

ve bargaining coverage rate to be 5% of the wage earners and 1.1% of total employment in 2006 (Hayter and Stoevska, 2011).

Almost four in ten workers, however, think that it would be important to be covered by an agreement, whereas six in ten doesn't think so. The workers who are covered say in great majority that coverage is important. A very small minority (2%) has no opinion about this topic. The workers who are covered judge three times more often that it is important to be covered compared to the workers who are not covered.

Compared to male workers the women are twice as often covered by a collective labour agreement, but the male workers more often think that it is important to be covered. In the tea gardens/estates more than half of the workers are covered, followed by two in ten in the leather sector. By contrast, coverage in the RMG sector is less than one in ten, and in construction it is almost zero. In construction half of the workers answers that it would be important to be covered. half of the workers answers that it would be important to be covered.

Figure 31: Percentage of workers covered by a collective agreement and thinking it is important to be so, by gender, age, sector and employment contract



Source: *Wages and Work Survey Bangladesh 2020* (N=1894, missing bargaining coverage = 305 (including those who don't know), coverage is important = 54)

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APPENDIX 1: SAMPLING AND FIELDWORK

The sampling approach and the fieldwork are described in great detail in *Appendix to Wages in Bangladesh, Sampling and fieldwork of the Wages and Work Survey 2020*. Amsterdam, WageIndicator Foundation.

This report is available online, see <https://wageindicator.org/Wageindicatorfoundation/projects/decent-wage-bangladesh-phase-1>

APPENDIX 2:

WAGES AND WORK SURVEY

WageIndicator Salary Survey
Interviewer: what is your number or name?
Please select your number or name
Please type in your name
In which region and city do you do the interview?
The government and social partners discuss the Minimum Wage in Myanmar. Therefore they like to know about the actual wages of many workers and employees in Myanmar. Please share your wage information for this purpose.
Are you prepared to cooperate in the survey?
Yes
No
Do you want to tell why you don't want to do so?
No
I don't have time
Other reasons
Interviewer: If respondent told you, please write down
Interviewer: What is the gender of the respondent?
Female
Male
Other
Interviewer: How old is the respondent approximately?
<20
20 - 29
30 - 39
40 - 49
50+
Do you have a paid job?
Yes
No
The Salary Survey is not for persons who don't have a job.
What are you?
Employee
Self-employed
Other
What is your status of employment?
Salary Paid Employee
Daily Wage labourer
Weekly Wage Labourer
Other
What are you mainly?
Seasonal worker

Casual worker
Paid apprentice
Paid family worker
Other
Other
Do you have one paid job or more?
One job
Two jobs
Three or more jobs
If you have more than one job, please answer with reference to your main job.
Do you have a paid job besides your own business?
Yes
No
Do you have a written employment contract with your employer?
Yes
No
Do you have a permanent contract?
Yes
No
Do you have a fixed-term contract?
Yes
No
What is the duration of your contract?
Daily arrangement
2 days - 1 month
1 - 3 months
3 - 6 months
6 - 12 months
12+ months
What kind of employment contract do you have?
If more options are applicable, tick the option that comes closest
A fixed term contract of less than 12 months
A fixed term contract of 12 months or more
A temporary employment agency contract
Casual contract
No contract
Other type of contract
How many people are employed at your place of work?
Applicable to your establishment
1 - I work alone
2 - 4
5 - 9
10 - 20
20 - 50
50 - 100
100 - 200

200 - 500
500 - 1000
1000 - 2000
2000 - 5000
5000 or more
Is your organisation established in more than one location?
No
Yes, in one city/municipality
Yes, in 1 region
Yes, in 2 or more regions
Yes, throughout the country
Yes, throughout the country and abroad
Yes, but only abroad
What is the main activity of the organization where you work?
What is the type of the enterprise you are employed in?
Government
Local private
Joint ownership (Local/Foreign)
Foreign
Other
What is the type of motif of the organization?
Profit organization
Non-profit organization
What is the legal status of the enterprise where you are employed in?
Private single ownership
Joint ownership
Private limited company
Public limited company
Government/Nationalized
Co-operative society
Other
How old are you?
At what age did you start working?
How many times have you changed jobs since?
Never
One time
More than once
At what age did you start working with your current employer?
At what age did you start your business?
What is the highest level of education you have attained?
What is your occupation?
Interviewer: write in the name of the occupation
Have you been promoted?
No

Yes
Do you have a supervisory/managerial position?
Yes
No
How many people work directly under your supervision?
If the number of people varies, please enter the average.
1
2
3
4
5
6
7
8
9
10 or more
Please enter a number between 10 and 10000
What is the proportion of male of your co-workers who work in your position?
0 % (no male co-workers)
Below 20%
Between 20% to 40%
Between 40% and 50%
Between 50% to 60%
Between 60% and below 80%
Between 80% and below 90%
More than 90% (almost all are males)
Do you work full-time?
Yes
No
How many days a week do you usually work?
1
2
3
4
5
6
7
ALERT: When you work full-time, it is likely that you work at least 3 days per week. Please check your answers.
Are your working hours agreed with your employer?
Yes, in writing
Yes, verbally
No
Not applicable

How many hours per week do you work under the terms of your contract?
Do you usually work the number of hours laid down in your contract?
Yes
No
How many hours a week do you usually work (normal + overtime hours)?
If you work overtime, how is this compensated?
Paid as normal hours plus premium
Paid as normal hours
Paid as time-off
Not compensated
Do you receive your salary per month?
Yes
No
On what payment period was your last wage based?
1 week
1 day
Other
On what payment period was your last wage based?
4 weeks
2 weeks
1 hour
1 year
Other
What was your last net wage?
Please only write the number without dots and/or commas
What is the basis of your tax payment?
Salaried Income per month
Other benefits provided by employer
Honorarium
Others
Does this amount include any allowances or bonuses?
Yes
No
Did you receive any of the following bonuses in the past 12 months?
Holiday allowance
End-of-year bonus, Christmas bonus, Festival bonus
Extra month payment
Profit share
Other annual bonus
Yes
No
Thinking about your earnings from your main job, what do they include
Basic fixed salary/wage
Piece rate or productivity payments
Transport arrangements (lease car, company car, commuting costs)

Free food or food voucher
Benefits in kind (vouchers or discounted goods and services)
Yes
No
Not applicable
Does your employer provide the following?
Food
Housing
Clothing
Transport
Yes
No
More about your wage
Did you receive your last wage on time?
I have asked for a pay raise in the past 12 months
I have received a pay raise in the past 12 months
My wage varies from month to month
I think it is important that my wages are covered by a collective agreement
Yes
No
Not applicable
How did you receive your last wage?
Into a bank account / by cheque
Cash in hand
In kind
Combination
Do you yourself or your employer contribute to your social security?
Pension fund
Unemployment fund
Disability fund
Medical insurance
Yes, my employer
Yes, myself
Yes, both
Yes
No
I don't know
Does your employer pay contribution to pension or pay gratuity for you?
Yes
No
I don't know
Which social security benefits do you have?
Paid annual leave
Paid sick leave
Medical benefits

Yes
No
From late March to late May 2020, were you absent from work for a long period or the entire period, due to COVID-19?
Yes
No
If yes, then what was the main reason for your not going to work during the period from late March to late May 2020?
My workplace/company was not in operation
I was not called by my employer after the company resumed operation
I was called by my employer but did not go to work considering the risk of infection
I was sick
One or more of my family members were sick
Unavailability of transport
Could not go due to area-based government restriction
Other (specify)
Yes
No
Not applicable
If "Other", please specify your reason for not going to work during late March to late May 2020
From June 2020 till now, have you been absent from work for a long period or the entire period, due to COVID-19?
Yes
No
If yes, then what was the main reason for your not going to work from June 2020 till now?
My workplace/company was not in operation
I was not called by my employer after the company resumed operation
I was called by my employer but did not go to work considering the risk of infection
I was sick
One or more of my family members were sick
Unavailability of transport
Could not go due to area-based government restriction
Other (specify)
Yes
No
Not applicable
If "Other", please specify your reason for not going to work during June 2020 till now
How many days were you absent from work in each of these months due to COVID-19, excluding general weekends and government holidays?
March 2020
April 2020
May 2020
June 2020
July 2020
August 2020

September 2020
Compared to before the COVID-19 outbreak, approximately what percentage of your earnings has been reduced during the period from late March 2020 till now?
What are the main reasons for your income loss during this period from late March 2020 till now?
My working hours were reduced
The employer has reduced my wage for the same hours of work
I have no option to work overtime
I no longer get allowances/bonus that I used to get before the COVID-19 outbreak
Yes
No
Other (specify)
How did you cope with the income loss?
Received cash assistance from the government
Received cash assistance from non-government organizations (NGOs)
Received food distribution from the government
Received rations from the company/employer
Borrowed from friends or family
Borrowed from microfinance institutions
Borrowed from other small lenders
Other (specify)
Yes
No
If "Other", please specify in what other way you coped with the income loss
Please indicate the level of adequacy for the following hygiene-related provisions in your workplace environment, in terms of COVID-19 precautions
Safe distance between work stations
Safe distance/space in dining seating area
Independent workstations, as opposed to shared
Independent use of all work equipment, as opposed to shared
Number of washrooms/toilets
Not at all adequate (High risk)
Somewhat adequate (Moderate risk)
Adequate (Low risk)
Not applicable
Please indicate the level of adequacy of supply for the following hygiene facilities in your workplace
Disinfectant
Hand sanitizer
Handwashing facilities
Masks
Gloves
Not at all adequate (High risk)
Somewhat adequate (Moderate risk)
Adequate (Low risk)
Not applicable

Are you covered by a collective agreement (about wages)?
Yes
No
I don't know
How satisfied are you with your pay?
Highly dissatisfied
Dissatisfied
Neutral
Satisfied
Highly satisfied
With how many people do you live in your household?
1, just me
2
3
4
5
6 or more
With whom do you live in your household?
Spouse / partner
One or more children
Other people
Yes
No
Do you have children?
Yes
No
How many children live in your home?
0
1
2
3
4
5
6 or more
How many people in your household have an income from work, benefits or other sources?
0
1
2
3 or more
In the past 12 months did you receive any financial support from relatives abroad?
Yes
No
In the past 12 months have you send monetary remittance to your family?
Yes

No
What is the name of the organization where you work?
Thank you for completing the wage and work survey.
What is gender of respondent?
Woman
Man
Other
Respondent's cooperation during the interview

APPENDIX 3: COST-OF-LIVING SURVEY

Cost of Living Survey

Find out what prices are in your neighbourhood and we will tell you your living wage.

Feel free to skip the items for which you don't know the price

REGION:

	QUANTITY	PRICE
Milk (regular, pasteurized and prepackaged)		
Loaf of Fresh White Bread		
Flat bread or pita		
Rice (cheapest available)		
Rice (of standard quality)		
Bulgur		
Local Cheese		
Cream		
Chicken Breasts (Boneless, Skinless)		
Bovine Meat (Beef)		
Mutton and Goat Meat		
Pork Meat		
Poultry Meat		
Dried Fish		
Fish, Seafood		
Freshwater Fish		

Bananas		
Apples		
Lemons, Limes		
Orange or other citrus		
Pineapples		
Mango		
Tomato		
Bell pepper or sweet pepper		
Carrot or other non-green vegetables		
Kale		
Spinach or other leafy green vegetables		
Cabbage		
Onions		
Potato		
Plantains		
Sweet Potatoes		
Yams		
Starchy Roots (Beet, Celeriac, Radish)		
Cassava		
Bottle of water		
Beer		
Bottle of Wine (Mid-Range)		
Eggs		
Tofu		
Soyabeans		
Yogurt		
Beans		
Peas		
Lentils		
Chickpeas or other pulses		
Pasta		
Cereal flour		
Coffee		
Tea		
Groundnuts (Shelled Eq)		
Sunflowerseed or palmkernels		
Olives		
Salt		
Sugar (Raw Equivalent)		
Cereals		
Maize		
Butter, Ghee		
Honey		
Sunflowerseed oil		
Regular cooking oil		

Transport items

	QUANTITY	PRICE
Trip to the nearest city (applies to rural areas only)	-	
Monthly pass (for the use of public passenger transportation in urban places)	-	
Gasoline		

Housing items

	PRICE
How much is the monthly housing cost of an apartment for one person (one room, kitchen and bathroom) in your city/region?	
How much is the monthly housing cost for an apartment for a family (two bedrooms, one living room, kitchen and bathroom) in your city/region?	
How much is the monthly housing cost for a single room (in an apartment sharing kitchen/bathroom with others) in your city/region?	
Housing cost includes the payment for the following services (indicate all that applies):	YES/NO
Rent (applies to tenants only)	
Mortgage payments (applies to owners only)	
Electricity	
Heating	
Water	
Garbage collection	
Routine maintenance and repairs	
Cooking fuel	
Taxes on dwelling	
Internet connection	

Estimate what are the minimal monthly expenses of a family of 2 adults and 2 children on following items (please be as accurate as possible)

	PRICE
Food	
Drinking water	
Acceptable housing	
Transportation (assuming the use of public transportation)	
Personal and health care	
Education (assuming that children attend public school)	
Clothing and footwear	
Other essential expenses	

Thank you!

APPENDIX 4: COLLECTIVE LABOUR AGREEMENTS

N	Title of the Collective Agreement	Starting Date/ Date of signing
1	Tripartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), Tannery Workers' Union, and the Office of the Joint Labour Director of Arbitration (01 January 2010-31 December 2011) - 2010	2010.01.01
2	Tripartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), Bangladesh Tanners Association (BTA), and Hazaribag Tannery Workers' Union, (01 January 2008-31 December 2009) - 2008	2008.01.01
3	Tripartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), Bangladesh Tanners Association (BTA), and Hazaribag Tannery Workers' Union, (01 January 2004-31 December 2005) - 2004	2004.01.01
4	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), and Hazaribag Tannery Workers' Union, (01 January 2002-31 December 2003) - 2002	2002.01.01
5	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), and Tannery Workers' Union, (01 January 2000-31 December 2001) - 2000	2000.01.01
6	Tripartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA), Bangladesh Tanners Association (BTA), and Hazaribag Tannery Workers' Union, (01 January 2006-31 December 2007) - 2006	2006.01.01
7	Memorandum of Understanding between The Finery Limited, Bangladesh Textile and Garments Workers League (BTGWL), Department of Inspection for Factories and Establishments, and Bangladesh Garment Manufacturers and Exporters Association (BGMEA), 2nd July 2020	2020.07.02
8	Memorandum of Understanding between Milina Fashion Co. Ltd., Bangladesh Textile and Garments Workers League (BTGWL), and Industrial Police, 23rd June 2019	2019.06.23
9	Memorandum of Understanding between Creative Woolwear Ltd., Bangladesh Textile and Garments Workers League (BTGWL), and workers' representatives, 20th January 2020	2020.01.20
10	Memorandum of Understanding between Alps Apparels Ltd., Bangladesh Textile and Garments Workers League (BTGWL), and Bangladesh Garment Manufacturers and Exporters Association (BGMEA), 11th May 2020	2020.05.11
11	Memorandum of Understanding between Allion Apparels Ltd., Bangladesh Textile and Garments Workers League (BTGWL), Workers, and Department of Inspection for Factories and Establishments, 14th October 2020	2020.10.14
12	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA) and Tannery Workers' Union, 28th April 2014	2014.01.01
13	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA) and Tannery Workers' Union, 28th April 2012	2012.01.01
14	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA) and Tannery Workers' Union, 16th July 2018	2018.01.01
15	Bipartite Collective Bargaining Agreement between Bangladesh Finished Leather, Leathergoods and Footwear Exporters' Association (BFLLEA) and Tannery Workers' Union, 19th June 2016	2016.01.01
16	নষিপত্তনিমা Memorandum of Settlement between Romana Fashions and Workers' Representative, 11th April 2017	*

17	মালিকি শ্রমকি সমঝোতা স্বাক্ষর Memorandum of Understanding between Globus Garments Ltd. and Workers, 15th September 2020	2020.09.15
18	সমঝোতা চুক্তি Memorandum of Understanding between Lily Apparels Ltd., Department of Inspection for Factories and Establishments (DIFE), and Bangladesh Textile and Garments Workers League (BTGWL), 15th October 2020	2020.10.15
19	সমঝোতা চুক্তি Memorandum of Understanding between Papyrus FastQ (BD) Ltd., Department of Inspection for Factories and Establishments (DIFE), and Bangladesh Textile and Garments Workers League (BTGWL), 29th September 2020	2020.09.29
20	সমঝোতা চুক্তি Memorandum of Understanding between Classic Fashion Concept Ltd., Bangladesh Garment Manufacturers and Exporters Association (BGMEA), Workers' Representatives, and Workers, 22nd August 2020	2020.08.22
21	সমঝোতা চুক্তি Memorandum of Understanding between Swiss Tex Ltd., Bangladesh Textile and Garments Workers League (BTGWL), Green Bangla Garments Workers Federation (GBGWF), and workers of Swiss Tex Ltd., 29th June 2020	2020.06.29
22	গারমেন্টস শলি়প সকেটররে সার্বকি শ্রম পরিস্থিতি পিৰ্যালোচনার জন্য় অনুষ্ঠিতি ত্রপিক্ষীয় সভার কার্যববিৰণী Tripartite agreement between Bangladesh Garment Manufacturers and Exporters Association (BGMEA), Ministry of Labour and Employment, Jatio Sramik League, and IndustriALL Council, to review labour situation in garments sector, 23rd February 2017	2017.02.23
23	সাউদার্ন নীট ওয়্যার লঃ কর্তৃপক্ষ ও শ্রমকি ইউনিয়ন (সবিএি) এর মধ্যযে গত ১১-৩-২০১৮ ইং তারখিে স্বাক্ষরতি সমঝোতা স্মারক। Memorandum of Understanding between Southern Knitwear Ltd. and Worker Union (CBA), 11th March 2018	2018.03.11
24	Memorandum of Understanding between Apex Holdings Ltd. and Bangladesh Garment, Textile & Leather Workers' Federation (BGTLWF), 24th September 2017	2017.09.24
25	CBA-03-Bipartite-Apex_Holdings-Memorandum_of_Settlement-BGTLWF - 2017.docx	2017.09.24
26	ত্রপিক্ষীয় সমঝোতা স্মারক Tripartite Memorandum of Understanding between Tanzila Textile Ltd., Bangladesh Garments, Textile & Leather Workers' Federation (BGTLWF), and Bangladesh Garment Manufacturers and Exporters Association (BGMEA), 5th September, 2020	2020.09.05
27	দ্বি-পাক্ষকি সমঝোতা। এয়াডমস এয়াপারলেস্ লমিটিডে কর্তৃপক্ষ ও BGTLWF এর মধ্যযে দ্বি-পাক্ষকি সমঝোতা স্মারক Bipartite Memorandum of Understanding between Adams Apparels Ltd. and Bangladesh Garments, Textile & Leather Workers Federation (BGTLWF), 19th October 2020	2020.10.19