

Ready-made Garments of Bangladesh: Challenges, Prospects and Contribution to GDP

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Abstract: Ready-made garments (RMG) are Bangladesh's fastest-growing and highest-earning industry. It generated vast job possibilities and decreased poverty via socioeconomic growth. Despite its achievements, this industry faces several obstacles to further expansion. This research examines the significance and problems of Bangladesh's ready-made clothing sector. To complete the objective, descriptive research is undertaken using various records. The research shows that since its launch, particularly in the past several decades, the RMG business has contributed considerably via the establishment of physical infrastructure and the development of human capital. As a result, 90% of female workers is found in the workplace of Southeast Asia and RMG contributes through 81% of export income and 14.07% GDP of Bangladesh. Future development will be hampered by issues such as pollution of natural resources, low-skilled labour and inadequate infrastructure, the energy crisis, high interest rates on bank loans and tax rates on the wealthy, a complex social compliance system, political instability, an absence of market and product variety, lack of compliance with the Accord and Alliance agreements, and a lack of integration. To make the industry more effective, acceptable to all stakeholders, and mutually beneficial, public and private sectors must collaborate and coordinate their efforts.

Keywords: Ready-Made Garments Sector, Bangladesh, Contribution, Challenges, GDP Growth Challenges, Diversification.

Introduction

Ready-to-wear (RMG) in Bangladesh has helped boost the country's economy. RMG has become one of Bangladesh's most important export sectors. The industry has contributed to China's economic growth for decades and is now its top exporter. It improved socioeconomic conditions by creating several work opportunities for the

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underprivileged and uneducated females in Bangladesh. Ready-to-wear has helped women achieve economic independence by generating jobs. Bangladesh's RMG industry, which employs rural impoverished illiterate female labourers, is well-known for its low-cost labour and low-quality clothing. As a result, it still has difficulties in creating high-quality goods. Weaved garment production is further complicated by the necessity for expensive, long-delayed raw materials. As a result, a low-cost clothing industry has been formed. Developing technical expertise, training, and innovation, as well as conducting research and development activities, are all low on the priority list for the industry as a whole. As a result, this industry's long-term competitiveness suffers. Humdrum for repeated labour and a lack of workplace enthusiasm are other issues. A number of high-profile incidents, like the Rana Plaza and Tazrinfires disasters, have highlighted the need of worker safety for RMG companies. The Bangladesh Accord on Fire and Building Safety (the "Accord") and the Alliance for Bangladesh Worker Safety (the "Alliance"), in addition to government measures, have both made considerable steps forward. Bangladesh RMG products are thus more costly in the European market, where Bangladesh's primary export destination is fixed. In the consequence of terrorist attacks in America in 2001 and the subsequent economic collapse in 2004, Bangladesh's exports to the United States fell by 13.04 percent (Berik and Rodgers, 2008). Despite its importance to the economy in terms of job creation and revenue production, this industry is confronted with the difficulties, in both outside and inside of the country. RMG's contribution to economic growth, issues it faces, and possible solutions are all explored in this article.

Objective of the Study

The study's primary goal is to determine and examine the impact of the Ready-to-Wear sector in the country's economic growth and the issues it is now experiencing. Here are the study's precise goals, in order:

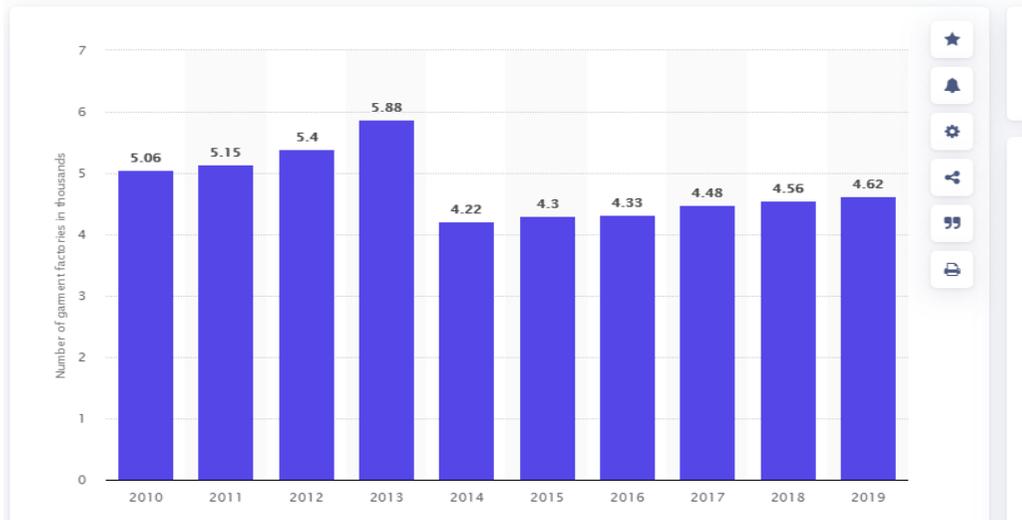
- To portrait the picture of the impact of Ready-to-Wear sector on Bangladeshi economic.
- Identifying the sector's obstacles, as well as to seek solutions to those issues.

Continuous Growth of Factories in RMG Industry

On its first shipment to the United States, Reaz Garments made a profit of \$69,000. The true turning point came in 1979, when Desh Garments Ltd was founded as the country's first 100 percent export-oriented company. This manufacturing facility for apparel was, at the time of its creation, the most advanced and technologically advanced of its kind in the subcontinent (Yunus and Yamagata, 2012). After forming an equity joint venture clothing firm in 1980, Youngone-Bangladesh and

Treximb Ltd. As a result, both the number of manufacturers and the value of exports have increased dramatically. As a direct consequence of this trend, the total number of RMG factories has seen significant growth over the course of the past three decades.

Number of garment factories in Bangladesh from 2010 to 2019
(in 1,000s)



Employees in the RMG Industry

As a result of Bangladesh's RMG industry's growth, the country's labour force, especially for the female employers. The event aimed to increase female participation and self-determination. The RMG industry creates directly opportunity for the employment more than four million people. Table 2 is being shown how the RMG industry's workforce is changing over time.

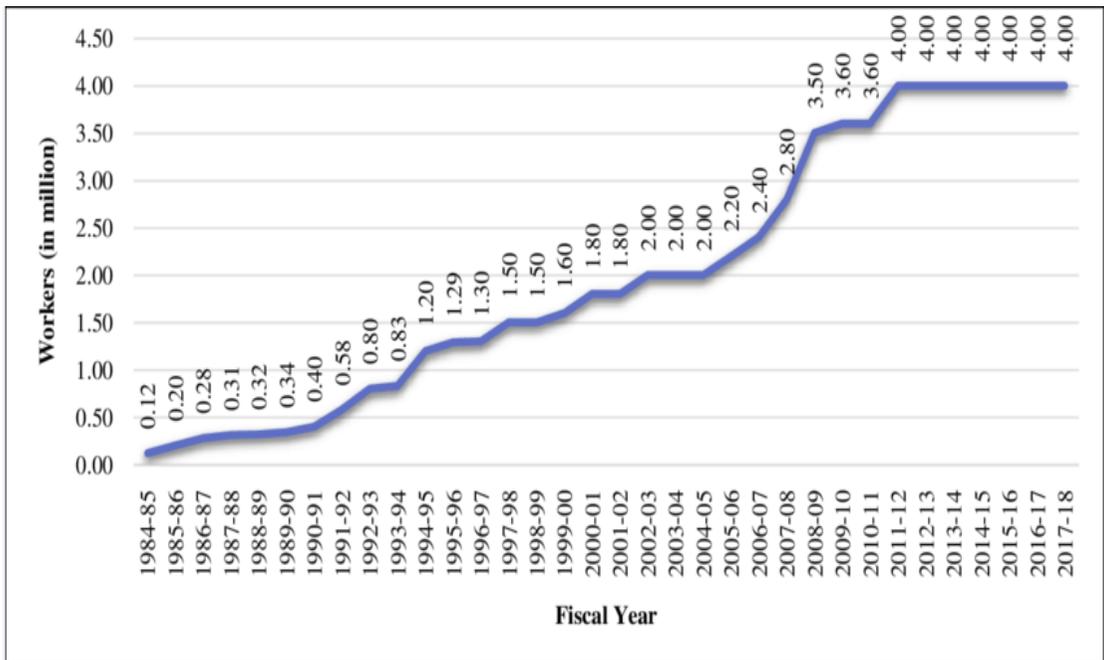


Table 2: Workers Trends in RMG Sector

In the 2012-2013 fiscal years, the number of employees expanded at a higher pace and surpassed 4 million. There was no change in the amount of employment in the following year, though. Nearly 90% of the overall work force consists of women. To begin with, inexpensive female labour was the most important aspect this country's flagship export-oriented sector's early success.

Country	No of Workers	% of Female
Bangladesh	4 Million	90
Sri Lanka	31200	81
India	5.3 Million	38
Nepal	52000	18
Pakistan	912000	15

Source: BGMEA 2015a.

The Export Contribution of the RMG Industry

The contribution of the RMG industry to exports of the nation has grown phenomenally.

The RMG Industry's Importance to Export

Growth in the RMG sector's contribution to the export of the nation has been tremendous.

The Contribution of RMG Sector to Export Arena

The RMG industry's contribution to exports has increased dramatically throughout the years. It has become the country's most important source of foreign currency. RMG has emerged as a significant contributor to economic growth and development during the previous two decades. The garment industry's exports were less than one million dollars in 1978, but they increased to \$31.57 million in 1983-84, \$10.7 billion in 2007, and \$24.49 billion in 2013-14 from those low beginnings. This information is summarized in Table 4.

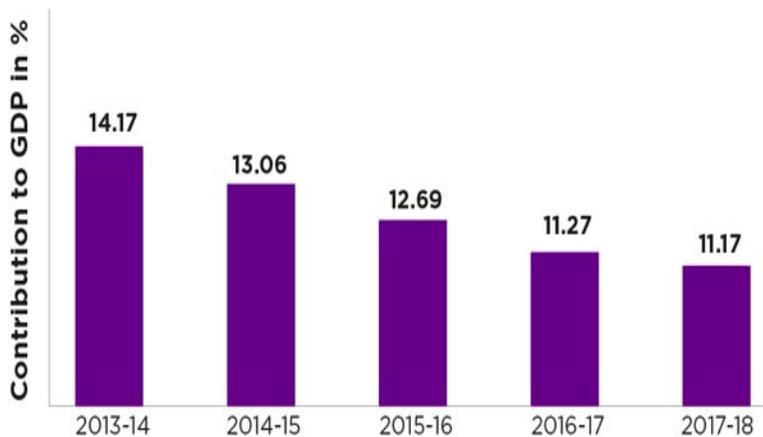


Figure: RMG sector's contribution to GDP from FY 14 to 18.

RMG Export Earnings and Contribution to GDP

As a consequence of the RMG sector's phenomenal expansion, it also made a significant contribution to the country's GDP.

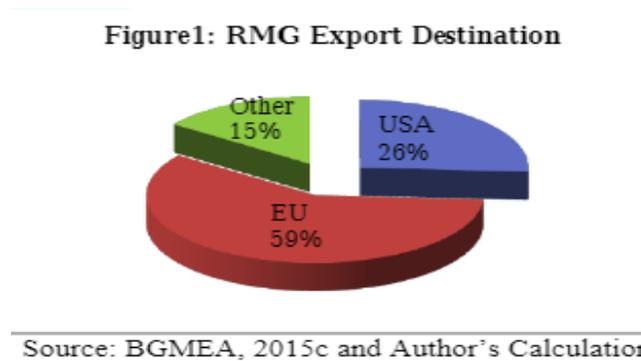
Bangladesh RMG Export to World from Fiscal Year 2015-2016 to 2017-2018

Million US\$	Woven			Knit			Total (Woven+Knit)		
	2015-2016	2016-2017	2017-2018	2015-2016	2016-2017	2017-2018	2015-2016	2016-2017	2017-2018
EU countries	7,731.96	7,857.02	8,619.61	9,421.40	9,893.58	11,009.41	17,153.36	17,750.60	19,629.02
% of World	52.46	54.59	55.88	70.54	71.92	72.49	61.06	63.06	64.12
Growth%	18.60	1.62	9.71	6.49	5.01	11.28	11.63	3.48	10.58
USA	4,228.62	3,901.94	3,977.70	1,396.30	1,302.06	1,374.37	5,624.92	5,204.01	5,352.07
% of world	28.69	27.11	25.79	10.45	9.46	9.05	20.02	18.49	17.48
Growth%	6.49	-7.73	1.94	6.01	-6.75	5.55	6.37	-7.48	2.85
Canada	575.71	541.49	552.13	422.73	404.81	411.02	998.44	946.30	963.15
% of world	3.91	3.76	3.58	3.17	2.94	2.71	3.55	3.36	3.15
Growth%	5.64	-5.94	1.97	10.15	-4.24	1.53	7.50	-5.22	1.78
Other countries	2,202.46	2,092.14	2,276.81	2,114.99	2,156.79	2,393.71	4,317.46	4,248.93	4,670.52
% of world	14.94	14.54	14.76	15.84	15.68	15.76	15.37	15.09	15.26
Growth%	8.53	-5.01	8.83	12.58	1.98	10.98	10.48	-1.59	9.92
Grand total	14,738.74	14,392.5	15,426.25	13,355.42	13,757.25	15,188.51	28,094.17	28,149.84	30,614.76
Growth %	12.81	-2.35	7.18	7.47	3.01	10.40	10.21	0.20	8.76

Note. Source: EPB, Compiled by: RDTI Cell, BGMEA.

RMG Export Destination

The EU and the US have long been the two most significant destinations for Bangladeshi RMG exports. The vast majority of the country's raw materials and gemstones are shipped to only these two markets.



Accord and Alliance

BGMEA, the Bangladesh Government, international trade unions, the ILO, and multinational brands and merchants have all signed on to the Accord & Alliance, which makes it legally enforceable. After a number of tragic occurrences, such as the Tazrin tragedies and Rana Plaza, RMG sector of Bangladesh has included Accord and Alliance to ensure the safety of all stakeholders. Bangladeshi factories

covered under the Accord and Alliance umbrella as of December 2014 are displayed in the chart below.

	Accord	Alliance
Brand and Retailers	Around 150 retailers mainly from Europe; a few from North America	27 retailers, all from North American.
Program tenure	5 years (2013 – 2018)	5 years (2013 – 2018)
Core program Elements	Safety inspections fire and building safety training sponsored funding for factory improvements.	Safety inspections, safety and Empowerment training, funding for factory improvements.
Factories Covered	All factories under accord totaling 1619.	All factories under alliance totaling 626.

Source: Center for Business and Human Rights, 2014

Threats for RMG Sector

Incompetent employees It is impossible for an industry to thrive and expand without the right mix of knowledge and experience. Despite the industry's expansion, a scarcity of qualified workers is impeding its progress. Women comprise 90% of the workforce of 40 lac, and most of them are uneducated, amateurish and come from pastoral regions. To put it another way, compared to rivals like India (92 percent), Pakistan (88 percent), and Vietnam (90 percent), productivity in the United States is 77%. Because of a dearth of qualified trainers and a shaky training programme (which only included workers and was irregular), training facilities in many firms are not available in-house. For those that do, there are no training aids available, no systematic way to assess and evaluate a company's training needs, and no correlation between training's benefits and the company's bottom line to guide the development of training.

Insufficient Infrastructure

Lack of infrastructure for utilities and transportation is stifling Bangladesh's RMG industry. Many of Bangladesh's commercial goods are handled at the Chittagong port, which suffers from labor issues, a lack of management, and inadequate equipment (World Bank, 1999). Chittagong port's production and efficiency are lower without a deep-water harbour. Maritime freight has a 10-day lead time. Bangladeshi railways and Dhaka-Chittagong airports have limited capacity.

Energy Calamity

Energy issues like gas, oil, and electricity destroyed the RMG sector investment plan. Basic necessities such as gas, oil and electricity are necessary for industrial growth. Due to the quick fall in output, export supplies were restricted as a result of

load-shedding. Factory owners are forced to employ more expensive alternative energy sources like generators and independent power plants (IPPs) because of the frequent outages. A sudden increase in power price means that the cost of manufacturing increases. The acute gas and electrical shortage, which affected 60 to 70 percent of the plant, prevented the company from accepting export orders from all over the world. Due to a power shortage, the company lost a total of USD 1.6 million a day in output.

Safety Issue

Unplanned industrial structures were used during the beginning of the RMG industry, which resulted in the use of common buildings for factory purposes. As a result, a number of catastrophic collapses occurred, including the Rana plaza and Tazrin events, which resulted in the deaths of thousands of people. As a result, people are more concerned than ever before about their own safety.

Bank Credit and High Rate of Interest

Anywhere in the globe, bank lending is an essential source of development financing. The lower the cost of capital, the faster industrialization moves forward. However, Bangladesh's financing rates have traditionally remained very high, resulting in higher manufacturing costs. Due to the high interest rates on bank borrowing, RMG exporters face harsh competition in the worldwide market Table 6 depicts the loan rate of interest.

Country	2010	2011	2012	2013	2014
Bangladesh	13.0	13.3	13.0	13.0	13.0
China	5.8	6.6	6.0	6.0	5.6
India	8.3	10.2	10.6	10.3	10.3
Japan	1.6	1.5	1.4	1.3	1.2
Myanmar	17.0	16.3	13.0	13.0	13.0
Pakistan	14.0	14.4	13.5	12.0	11.7

Source: The World Bank, 2015

Tax Rate

On June 30, 2014, the tax-exemption period for RMG and knitwear exporters came to an end. Thus, RMG exporters are anticipated to have difficulties in paying higher taxes on their export revenues in the next fiscal year. Involvement in the Community Many western customers have made social compliance in Bangladesh's RMG business a must, and it is now seen as the primary problem in the wake of the tragic Tajrin and Rana Plaza events. As a consequence, in July 2013, the Bangladesh

Labor Law was revised in accordance with the ILO. A new difficulty has arisen as a result of the need to adopt new labour laws in every factory.

Political Crisis

With a score of 92.5, the nation came in sixth place in Asia and 29th overall. Unrest in government, convoluted laws, and a crooked administration are all harming the RMG industry's production and reputation. The European and US CPO reports say that if political stability decreases, they will cut their sourcing from Bangladesh to the fifth position. Political turmoil, strikes, and corruption are the greatest impediments to economic progress. There has been a lot of political instability in Bangladesh, which has had a negative impact on the garment sector and other businesses.

Market and Product Diversification

The Bangladeshi RMG items are mostly sold in European Union along with the United States, which account for 85% of garment exports from Bangladesh. Bangladesh's low-cost product variety and quota system help the EU market thrive. Even with duty-free access to the EU, a new WTO study shows that Bangladesh has not been able completely use this privilege effectively. Germany, the UK, France, and Italy source 80% of the European Union's clothing exports from us. Bangladesh is dependent on a few key clients and needs a new EU market. T-shirts, shirts, sweaters, shorts, jeans, and women's and children's clothing make up the majority of Bangladesh RMG exports. Low-value items with low marginal profitability account for 75% of Bangladeshi RMG exports, according to a recent study. Product diversity is the key to long-term company success in today's globalised and ever-changing fashion industry. As a result, the RMG industry must broaden its range of goods to include not only low-end but also high-end things.

Coverage of Accord and Alliance

The Accord and Alliance have now become one of Bangladesh's most significant concerns in the garment sector (Islam, 2015). Each organisation is run by European and American clothing businesses, merchants, and importers. As a result of this agreement and alliance, the RMG sector in Bangladesh would be more secure and stable. As a result, it's a tremendous task to follow all of the rules and regulations for fire and building safety set out by Accord and Alliance. Accord and Alliance conditions sometimes need joint efforts and large financial investments, such as renovation of infrastructure, moving and relocation of factories, and significant investments in fire protection equipment. Trade in raw materials has presented Bangladesh with two major challenges: first, the country must get raw materials at a

reasonable price, and second, the RMG sector must compete in a quota-free trading environment with formerly prohibited nations (Rock, 2001). Longer lead times and dangers of sourcing due to Bangladesh's dependence on imports have been identified. When purchased from India or China, the typical lead time for woven fabrics is 15 days, but it takes just seven days on average for fabrics made in Bangladesh to be ready (Berg et al., 2011).

Prospects and Problems of RMG

Unionization of Western World labour began in the 1950s, when workers formed trade unions. Increased compensation and other benefits for employees resulted in a higher cost of manufacturing because of these and other reforms. Retailers began looking for cheaper venues to produce their goods. For businesses looking to relocate, developing countries like Hong Kong, Taiwan, and South Korea offered attractive economic policies and a non-unionized and highly disciplined workforce that could create high-quality goods at lower rates. In 1974, the Multi Fiber Agreement (MFA) was signed in attempt to limit the amount of RMG goods imported into industrialised nations from developing ones. Export quotas might be imposed on nations that exceeded the limits set by bilateral agreements by the developed countries. Because of these limitations, manufacturers began looking for nations with low-cost labour that were not subject to quotas. RMG investment began flowing into Bangladesh at this point in time. The Korean Daewoo Company provided free training to select Bangladeshi citizens in the early 1980s. After returning to Bangladesh, several of these employees cut off their links with the factory they had worked for and formed their own businesses. The RMG business, which is 100% export-oriented, has grown tremendously in the previous 15 or so years. In 1978, there were only nine export-oriented garment manufacturing units that earned export revenues of less than a million dollars, according to the United Nations. A few of these factories manufactured clothing for both the local and international markets, some of which were very modest in scale. For example, Reaz Garments, Paris Garments, Jewel Garments, and Baishakhi Garments are all modestly sized but historically significant boutiques. In Dhaka, Bangladesh, Reaz Garments was founded in 1960 as a tiny tailoring shop called Reaz Store. For the first 15 years of its existence, it was solely available in the United States. A Paris-based corporation purchased 10,000 men's shirts valued French Franc 13 million from M/s Reaz Garments Ltd. in 1978, and the company's activities were extended into the export market. It was the first Bangladeshi company to export clothing directly to the United States. Founded in 1979, Desh Garments Ltd was the first garment industry non-equity joint venture. Daewoo Corporation in South Korea was

a technical and commercial partner of Desh. Furthermore, it was one of the first companies to focus only on exports. By the beginning of 1980, it had 120 operators, three of whom had had their training in South Korea. Youngones Corporation founded a South Korean-Bangladeshi joint-venture apparel business in 1980. The new company, Youngones Bangladesh, is majority-owned by Bangladeshi investors, who own 51% of the company's stock. It sent padded and non-padded coats to Sweden in December 1980. They quickly learn global clothing markets and marketing. They learned how to support RMG exporters. Bangladesh has become more appealing to foreign customers as a source of raw materials. Foreign purchasers offered loans to suppliers in many instances as part of specific agreements in order to take advantage of this low-cost source. Local banks contributed to the equity capital in certain situations. With the introduction of back-to-back letter of credit, the issue of working capital was substantially alleviated, as well as the importation of quality fabric, the fundamental raw material of the business. The government paid a lot of attention to the RMG sector. At the end of 1982, there were only 47 clothing factories in the United States. As many as 587 clothing manufacturers opened in 1984-85, which was a major turning point in the industry. In 1999, there were 2,900 RMG manufacturers, which was a 50 percent increase from the year before. Bangladesh is one of the 12 largest clothing exporters in the world right now, ranking sixth in terms of T-shirt shipments to the United States and fifth in shipments to the European Union. About 22% growth has been seen in the business since 1990. Jute and jute products dominated Bangladesh's exports until 1980, accounting for more than half of the country's overall export revenue. RMG exports overtook jute and jute items in the late 1980s to become the country's top export item. Bangladesh's Readymade Garments Industry has only existed for a short time. Despite this, the story is full of intrigue and suspense. One of the most recent chapters in this saga is the fight to gain workers' rights in the United States. We've put up a timeline that traces the RMG industry's history from its modest beginnings to the current day.

Future of RMG in Bangladesh

RMG's demand in the domestic market is growing as the quality of life rises. As the second biggest clothing exporter, Bangladesh accounts for only 4.83 percent of the entire global export, compared to China's 37.35 percent. Because of its economies of scale and enormous manufacturing capacity, China has a competitive edge in terms of unit pricing, but Bangladesh has the benefit of low labour costs. In Bangladesh, an RMG worker's monthly salary is \$100, but in China, it is \$300. As a result, Bangladesh has the lower labour cost advantage. As a result, Bangladesh has a big

opportunity to enhance its global market share in the garment industry because of a large difference between Bangladesh and China's world share.

The rising quality of life in China, coupled with an increasing focus on high-tech, high-priced capital equipment, has driven up the per-unit cost of manufacturing. As a result of the rise in unit price, Chinese clothing has become less appealing to global garment customers. Those prospective customers may move on to Bangladesh in the near future. Additionally, Bangladesh is attempting to diversify its economy by entering new markets. The clothing export share to unconventional countries was 15% in 2013-14, in addition to increases in the traditional markets of the EU and the US. Labor costs in Bangladesh are lower than in many other nations, which may draw in global consumers. Companies in the EU and the US want to increase their present procurement of clothing from Bangladesh by 25-31 percent in Bangladesh by 2020. During the next five years, giant Swedish retailer H&M plans to increase its Bangladesh garment volume to US\$3 billion. By 2020, the global clothing market is expected to be worth \$650 billion. The RMG market in China is valued at \$310 billion. There is a lot to discover about Bangladesh. The Dhaka Apparel Summit of 2014 set a goal for Bangladesh to export RMG worth \$50 billion by 2021.

Recommendations

- ✓ The proposals that follow are based on the belief that the RMG sector may serve as a catalyst for the country's aspiration to reach middle-income status as quickly as possible.
- ✓ Multimodal transportation facilities, sound infrastructure, and continuous energy supply are to be established via public-private partnerships.
- ✓ Furthermore, the BGMEA should lead the way in developing new product concepts as well as enhancing the efficiency of its workforce.
- ✓ In order to decrease corruption and preserve a trade-friendly climate, civil society and other socio-political players must take the necessary steps.
- ✓ Investment-friendly fiscal and monetary policies need to be implemented to ease the burden of current and future investors.
- ✓ Workers' welfare, safety, and health should be a top priority for RMG owners, and purchasers can assist improve the supply chain's efficiency by investing in the backwards-industrial economy.

Conclusion

Bangladesh's RMG sector has emerged as the country's primary source of employment, revenue, and foreign currency. RMG has not been able to reach its full potential due to a variety of issues, including a shaky infrastructure, a lack of resources and a supporting environment, ineffective management and a lack of industrial integration. Bangladesh's economy may achieve its goal of becoming a middle-income economy if it manages these variables via joint effort.

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