

Invisible Workers, Visible Contribution

*A Study of Homebased Women Workers in Five Sectors
across South Asia*

by

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Chapter One

Homebased Women Workers in the Coir Industry (with special emphasis on Sri Lanka)

The Coir Industry - A Brief Overview:

An estimated 300,000 tonnes per year of coir fibre is produced world wide, the bulk of it coming from India followed by Sri Lanka. The industry has two distinct components, the traditional, labour intensive, largely feminized white fibre industry and the more modern, mechanized, export oriented brown fibre industry.

In 1995 the production of fibre products in Sri Lanka was 74,292 tonnes with brown fibre accounting for as much as 90%. Over 78 % of the produce was exported with an export value of US \$ 26.24 million. Introduced by the British at the end of the last century, the modern mill based brown fibre industry has completely overtaken and out paced the traditional coir industry in which home based women workers played a dominant role. Currently only about 10% of the production comes from traditional coir areas in the South while much of production and 85% of the fibre mills are based in North Western and Western Provinces now known as the Coconut Triangle. Thus while highlighting the concerns of women coir workers in Sri Lanka it is important to emphasize that they already constitute a small and declining part of the overall coir sector in the country.

In India, the white fibre industry has continued to predominate and the brown fibre industry has only recently made significant strides. In 1995 the production of 250,300 tonnes was almost equally accounted for by the two industries. About 20% of the output was exported with a foreign exchange value of US \$ 63.78 million. 80% of the coir industry in India is located in Kerala and has a long history of trade union involvement and struggles. The remainder is spread across the other Southern states. The Indian case is interesting in that starting off as a large factory based sector, the sector in response to the struggle for workers rights, has become small scale and homebased over the last fifty or so years, thus diluting the gains of the trade union movements.

(Sources: Mathew (1994), Thampan (1997), Risseeuw (1988), Sruti (1995), CWDS (undated)
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The Production to Consumption Chain and where women are located along it:

Chart 1 delineates the major processes involved in the production through consumption cycle of white fibre industry. Broadly, while the raw material and finished produce trade ends are both handled by male traders almost all labour processes in this extremely arduous industry fall to the lot of women workers. Male family members help with the more rigorous digging and sometimes cleaning of pits. Otherwise, the industry is almost exclusively feminine. Consumption, apart from a small high value segment of mats targeted at the export market, is almost entirely domestic and caters to the local household demand for rope, brushes, brooms, mats and matting at affordable prices.

Figure 1: The Production to Consumption in the White Coir Fibre Industry

In the brown fibre industry the role of women is peripheral and limited to tasks like carrying husks from the husk pile to the mill, carrying the fibre to and fro from fields, drying it out etc., with all mechanized, highly paid jobs being held by men.

The Economic Context

Estimated number of workers:

According to 1981 People's Bank estimates quoted by Risseeuw (1988) there were a total of 26,000 to 30,000 women workers engaged in the different aspects of white fibre production in Sri Lanka. Additionally, the brown fibre industry engaged about 16,000 workers of which 38% or roughly 6000 were estimated to be women taking the total industry count to about 35,000 workers the majority of these homebased workers in rural areas. However, this data is quite out of date and more recent estimates are required. According to observers the number of workers may have declined substantially due to the following factors:

- Emergence of tourism as an important alternate occupation in the South.
- An increasing number of women workers have migrated to the Middle East as domestic workers.
- Increasing levels of education among women, changing aspirations and lifestyles are leading them out of this traditional, arduous, low prestige occupation.

Nothing can however be ventured with any degree of certainty as white coir production levels remain the same and are in fact somewhat higher at around 7000 MT per annum from Risseeuw's estimates based on production levels of 5000- 6000 MT per annum and a micro level study done in 1998 (Jayaweera and Sanmugam) show that coir workers in the

South have educational levels higher than the national average. The issue definitely calls for further exploration.

In India the coir industry employs between 4.91 to 5 lakh workers of which 80% are women. The division of these between home and factory based workers is not indicated in the literature.

(Sources: Risseeuw (1988), Jayaweera and Sanmugam (1998), Sruti (1995))

Wages and Earnings:

Earnings in the sector have historically been very low (Risseeuw 1991) and cheap, female labour has in fact formed the basis for the survival of the industry in its traditional, unmechanized form over decades. The emergence of new technology, factory based production and higher wages have taken place at a parallel level in the brown fibre industry, involving male labour and leaving traditional women workers out of their ambit. Women are involved in a low paying, casual capacity in manual tasks such as carrying husks and separating fibre in the brown fibre industry and earn less than a third of their male counterparts.

A recent survey of 500 coir workers (80% from the traditional industry the remainder 20% from the brown fibre sector) reveals that income levels are low with 77% of the respondents earning less than SLRs. 1000 per month and less than 5% reporting earnings of over SLRs. 3000 per month. A large number are involved additionally in manual labour, petty trading and other supplementary activities in addition to agriculture to meet basic survival needs.

(Sources: Risseeuw (1988), Jayaweera and Sanmugam (1998))

Contribution of women workers to the sector:

No data exists to enable an estimation of womens' workers contribution to the coir sector. Even the approximate number of women still engaged in this traditional occupation is not known with any degree of certainty and recent trends in production and consumption have not been documented.

Trade and marketing set up

Women coir workers are usually bound into an exploitative relationship with local traders dependent as they are on them both for raw material supply and sale of finished goods. Traders normally operate at a profit margin of 60 to 100% and try to squeeze out maximum returns by raising the price of raw husks on the one hand and keeping constant the price of the yarn on the other. However, the workers are by no means a homogenous group and a large degree of differentiation exists between them based primarily on differential resources and different contractual relations with the market. Risseeuw identified six distinct types of workers as below, with an increasing degree of dependence on the traders.

1. Independent producers who own pits with a capacity of 500 to 1000 husks.
2. Those who do not own pits but are only partly dependent on the trader as they have the means to buy soaked husks.
3. Those who alternate between buying husks and obtaining them on credit.
4. Completely dependent coir workers who obtain husks entirely on credit from traders and under obligation to sell the rope back to the same trader.

5. Those who do not own a spinning set and spin rope by hand only. Their relationship with the traders is the same as 4 above but production and profits are even lower.
6. The very poorest who are not considered credit worthy and hire themselves out as labourers in others' pits.

(Source: Risseeuw (1988))

The Social Context

Profile of the coir worker:

The 1998 survey of three coir districts provides some insights about the socio- demographic and economic characteristics of coir workers.

In terms of demographic profile the survey showed that about 57% were in the 35-54 years age group, 32% below 35 years and 12% over 55 years. 81% of the respondents were married and the remainder single, widowed or separated. Women in the southern districts showed educational attainments higher than the national average and over 38% reported to have had over 10 years of schooling.

In terms of ownership and organisation it showed that 23.5% of the 500 respondents had their own pits, 35.8% worked in others' pits, 15% worked as members of organized groups (organized subsequent to Risseeuw's pioneering efforts), 7.4% as members of informal groups and 12.5% worked in a subcontracting modality for agents, collectors and export companies.

(Sources: Risseeuw (1988), Jayaweera and Sanmugam (1998))

Conditions of Work:

The white fibre industry relies on non mechanized labour in processes that are time and labour consuming and entail extreme drudgery. Husks of unripened coconuts are soaked for several months in water pits along river banks in proximity to the sea. These husks are removed from the water by hand, one piece at a time by a worker who has to stand in the water upto the waist or higher for about five hours at a time. The fibre is then cleaned and beaten by hand or a small club till the pith is removed. The fibre is then dried in the sun, and the remaining pith removed by hand or with a simple hand operated machine. It is then separated, graded and spun into yarn either by hand or by a two wheeled spinning machine needing three people to operate it. All these tedious tasks, excepting often the digging of pits (but not cleaning and emptying) are women's tasks.

Women start this work early in life (one-third started before the age of 12 and over half below the age of 15 years) and continue to be engaged in it through much of their lives. According to the survey few women worked beyond 8 hours a day with the majority reporting 4-6 hours a day. Given the intensity of working in the pits and that the work is combined with household duties and sometimes multiple economic activities, it would emerge that the coir workers lives are extremely onerous.

In consonance with the rest of the informal sector, no coverage is available for pregnancy, childbirth and child care. More than half the respondents were unable to withdraw from work to meet their maternal needs and only about a third were able to do so after childbirth. These women adopt a range of strategies to combine child care needs with their economic activities

- e.g. working while children are asleep, entrusting child care to older siblings or extended family

Box 1: Women Workers and the Law in Sri Lanka

Access to Resources

- Schedules in the Land Development Ordinance (1935) applicable in State settlements discriminate against women with regard to inheritance.

Equal Remuneration for Equal Work

- The principle of equal remuneration for men and women has been in practice for professional and middle level employment for several decades.
- Unequal wages for work of equal value in manual labour was eliminated in 1984 in 17 occupations, including tea and rubber in the plantation sector, under the Wages Ordinance Board.
- The informal or unorganized sector with its substantial number of women workers in agriculture, industries and services is outside the ambit of legislation.

Social Security and Benefits

- Laws on maternity leave were amended in 1985 to conform with international standards. the Maternity Benefits Ordinance and the Shop and Office Employees Act guarantee 12 weeks maternity leave and nursing intervals for 6 months for upto 2 pregnancies and six weeks leave for subsequent pregnancies.
- There is no clarity in the labour legislation regarding the minimum age of employment and the prohibition of employment under 12 years does not apply to the agricultural and urban informal sectors and to domestic service.

International Conventions

- ILO Conventions on Equal Remuneration for Men and Women for work of equal value (No. 100), Maternity Protection (No. 103), Labour Statistics (NO. 160) were ratified in 1993.
- In 1984 Sri Lanka withdrew from the ILO Conventions (Nos. 4,41 and 89) prohibiting night work to enable night shifts in Export Promotion Zones.
- The UN Convention on Elimination of all Forms of Discrimination against Women (CEDAW) has been ratified and A Women's Charter of Sri Lanka formulated. However, the provisions are yet to be incorporated in national legislation.
- Sri Lanka has yet to sign the ILO Conventions on Discrimination in respect of Occupations and Employment; on Migrant Workers; and on Homebased Workers.

members, sending children to the fields or pre-school etc. By and large these workers struggle to combine multiple needs without any institutional or state support.

(Source: Jayaweera and Sanmugam (1998))

Occupational health concerns:

Occupational health hazards are rife particularly from working in pits with chronic fatigue, exhaustion, pains and propensity to colds being the most reported fall outs.

(Source: Jayaweera and Sanmugam (1998))

The Policy Context

Impact of governmental policies:

Governmental policies in Sri Lanka have tended to concentrate on promoting and supporting with incentives and subsidies the brown fibre coir industry due partly to its export oriented nature and partially to the fact that the livelihood of a large number of male workers is connected to it. Some efforts were made in the seventies and eighties to mechanize the white fibre sector with the introduction of husk crushers and decorticators which provided on loan basis to export focused units. The success of these measures could have lead to the concentration of the economic activity in the hands of the more loanworthy traders and the concentration of spinning around a few units displacing thousands of women workers in coastal villages. However, due to the extremely low wages and margins at which the women operate and the presence of a stable, domestic market which absorbs their produce at reasonable prices the traditional white fibre industry has so far held out in its unmechanized, feminized, homebased form.

Governmental neglect has however covertly affected the industry in the following ways:

- Increasing costs and shortages of raw husks available to the women workers. Large quantities of husks from far and near are sucked into the mechanized sector to keep machines running at optimal levels. This deprives poor women from getting the few hundred husks that they can handle in their small retting pits.
- Also decreased access to basic inputs like water. Distance from home to sources of water supply, lack of paths to rivers and polluted water are some of the problems being increasingly faced by the coir workers.
- Difficulty in access to basic raw materials forces women to either buy extracted fibre from mills and incur additional costs in its purchase and transportation, thus lowering margins further, or to give up their independent, self employed status and to work in the factories as paid labour for converting fibre into yarn which is then sold by factory owners to export firms.
- The access of women to skills, training, new technology and information has been very low, with most relying on training handed down from family members. Apart from a few small scale efforts by NGOs no efforts have been made to develop new products and designs or to expand or tap higher value markets.
- The women's access to credit remains low with few having the collateral to furnish against loans and even fewer having the ability to successfully take and repay their loans. As per

survey results 51% of respondents cited inability to repay as the primary reason for not taking loans while another 10% cited the lack of collateral as the principle constraint.

- Additionally women coir workers have been vulnerable to the impact of market forces set into motion with the liberalization and opening up of the economy. Promotion of tourism, for instance, has had a steadily detrimental effect on the village level coir industry down the south coast. There have been instances where women coir workers have fought courageous but losing battles with foreign and local entrepreneurs and hoteliers to retain their husk pits in the sea and their coir making locations along the beaches.

(Sources: Risseeuw (1988), Jayaweera and Sanmugam (1998), Peiris (1989))

Issues for further study:

Keys gaps in the literature include:

1. Very little is known about what has happened to women's employment levels in the coir sector over the last two decades since Risseeuw's study in the early eighties. The numbers of women workers still engaged in homebased coir production, numbers who have moved to other forms of employment within the coir sector and numbers which have taken to alternate callings or have simply been rendered unemployment, need to be ascertained.
2. The change in the attitudes and perceptions of younger women towards coir work and the desirability of employment in the sector in their eyes needs to be explored further and it needs to be established whether the younger generation is being inducted into the profession in any substantial numbers.
3. The coir sector in India which continues to be white fibre based (though this is changing rapidly) and dominated by women workers needs to be studied further and the experiences and strategies of the women's rights movement of these two leading coir manufacturing countries needs to be pooled together and analyzed for deeper insight into the sector.

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Chapter Two

Homebased Women Workers in the Agarbatti Industry in India

The Agarbatti Industry - A Brief Overview:

The manufacture of agarbattis (incense sticks) is a traditional cottage industry emanating from the Thanjavur region of Tamil Nadu. It has increasingly taken on a national character and is now spread over the states of Karnataka (which is the dominant producer), Andhra Pradesh, Gujarat, Kerala, Orissa and Bihar. There are about 800 registered and 3000 unregistered agarbatti manufacturing units across the country. In 1989-90 the total quantity of agarbatti produced was estimated at 147 billion sticks and total domestic sales were of the value of Indian Rs. 7.1 billion (approx. US \$ 198 million) while exports accounted for an additional Rs. 1.5 billion (US \$ 42 million). Exports are rising sharply in recent years and in 1993-94 their value was recorded at Rs. 4 billion (US \$ 112 million).

(Source: Hanumappa (1996), NCAER (1990))

The Production to Consumption Chain and where women are located along it:

Agarbatti rollers, mostly women assisted sometimes by children, work both at home and in factories. Manufacturers generally contract out the bulk of the production, which is of lower quality sticks, to homebased workers while retaining a few in house rollers for quality control and for higher quality produce. Home based agarbatti workers are given the raw material comprising of bamboo sticks, jigat powder and charcaol by contractors for rolling. The equipment used is a low wooden board 3 sq. ft. in size around which the workers squat rolling the sticks on the board. Rolled raw agarbattis are supplied by the contractors to the factories where the perfuming drying and packaging are carried out. Women workers are also employed in factories as packers. The flow chart describes the production and marketing chain.

The raw material and labour costs involved in rolling raw agarbattis together constitute only 10% of total costs with manufacturers controlling all the high value processes (perfuming 30%, packaging 30% and marketing & overheads 30%) within the factory premises.

The bulk of the consumption is domestic with only 10 -15% being for the higher value export segment. Consumers tend to be concentrated in rural areas and to belong to the lower and middle income stratas.

NCAER (1990))

Figure 2: The Production to Consumption Chain in the Agarbatti Industry

Source: INBAR (1996)

The Economic Context

Estimated number of workers:

No reliable official statistics exist regarding the number of agarbatti workers in the country. The Census of Handicrafts reported 10,934 agarbatti workers across the country concentrated in Bengal, Delhi, U.P , Orissa and Maharashtra. Clearly not much credence can be given to these official statistics as they leave out of their purview the dominant producer states in the South. Reliance has thus to be placed on field observations and rough estimates by industry sources. As per these estimates there are approximately 500,000 agarbatti workers in the country of which 90 % are estimated to be women and about 80% to be homebased family labour. Of these workers half or 250,000 are based in Karnataka the bulk of them around Bangalore and Mysore; another 60,000 or so in Gujarat; 50,000 in Kerala and Tamil Nadu and the remainder distributed across the other states.

(Sources: Kaur (1999))

Wages and Earnings:

In general, agarbatti rollers whether home or factory based are paid on a piece-rate basis. Earnings vary across states with workers in Karnataka appearing to be somewhat better placed in contrast to their counterparts in Gujarat and Andhra, the other two states for which estimates are available. Workers here are paid at a rate of Rs. 9 per 1000 sticks and at an average productivity of 4000 sticks per full working day manage an effective wage rate of Rs. 36 per day. The average worker manages to earn about Rs. 1000 per month. In Gujarat, the rate is much lower at Rs. 5 per 1000 sticks and combined with lower productivity rates yields the workers incomes in the range of Rs. 325 per month. Payment in both these states is reported to be on a monthly based. In Andhra a rate of Rs. 6 per kilo of masala processed (approximately 1100 to 1200 sticks) is reported. Earnings for a family of six were reported in the range of Rs. 400 to 800 for a six day week implying an effective wage of Rs. 12 to 20 per day. Further, if the product is rejected for quality reasons the loss has to be borne by the workers lowering earnings further.

Factory based workers are paid somewhat better rates for higher quality sticks but given the lower productivity have the same effective wage rate. However, they are covered by the social security provisions mandatory under the Factories Act (provident fund, leave, medical and maternity benefits) and are therefore better off. The only benefit reported by homebased workers were a token gift at festival (Diwali) time.

(Sources: Kaur (1999), Krishnamoorthy (1999))

Contribution of women workers to the sector:

Women workers constitute 90% of the workforce of the industry which has an annual production value of around Rs. 8.5 billion.

Trade and marketing set up

The agarbatti industry has a deep penetration through the length and breadth of India with two thirds of its consumers coming from the income segment below Rs. 25,000 and only 3% from the top income bracket. Geographically 35% of the sales are reported from the South, 30% from the West, 18% from the North and 17% from East. Over 60% of the consumers in each of these regions are rural. While the basic process of manufacture is simple and the

costs of basic ingredients low, a great deal of secrecy surrounds the actual mixing of perfumes which give each brand its distinctive character. Other elements of brand differentiation include packaging and advertizing, which together with perfuming account in equal share for 60% of total costs. Another 30% is spent by manufacturers on transportation, marketing, dealers margins etc. Given that as much as 90% of the costs are linked to brand definition and marketing considerations, there is little scope for workers to directly engage in this sector or to seek any sort of independent or self-employed status within the industry. They remain firmly linked to the factories via contractors as piece-rate workers. Even the gains from cooperative formation in such circumstances can be predicted to be uncertain as the crux of the business lies in the market and not the production end.

As the workers are linked to the factories directly or through contractors and their role ends at the raw agarbatti production stage and they do not have any interface with the market little attention has been paid in the literature to the trade and distribution network involving wholesalers and retailers, margins involved etc. Contractors have a mark-up of Rs. 3 to 4 per 1000 (or roughly 25 to 30%) at which they supply to factories and which presumably covers their costs of operations and profits.

(Sources: Hanumappa (1996), Kaur (1999))

The Social Context

Profile of the agarbatti worker:

No detailed survey has been done of the social, demographic and other characteristics of the agarbatti worker. It can be ventured that most are women in the child bearing ages with family responsibilities working with the assistance of young children. Older women workers (above 40 years) prefer factory based employment as this provides them with a modicum of social and employment security. A large number have traditionally belonged to the Muslim community and there is a recent trend for agarbatti centres like Bangalore and Mysore to depend increasingly on migrant workers from Tamil Nadu and other poorer neighbouring states. While the women of the house may be the main worker she is helped by an average of two children. Frequently entire families of 6 to 10 members are engaged in the activity.

Conditions of Work:

Homebased workers engaged in agarbatti making in Bangalore live and work near the factories. Agarbattis are rolled on the pavements and lanes around homes in urban slums. They sit on the floor and roll the agarbattis hunched over low tables bought out of their own resources. Legs are stretched under these low tables. The task is extremely arduous and repetitive. Most workers spend about 4-5 hours per day in this work combining it with their household responsibilities to get an occasional respite from the monotony. While children form a distraction, in general homebased workers have a more conducive work environment than their factory counterparts who sit in rows of workbenches in dingy, ill-lit, sooty surroundings. Thus homebased rollers are able to match in four hours the productivity achieved by factory workers in eight hours due to the congeniality of the work environment and the flexibility in their schedule allowing them to vary tasks.

In Ahmedabad the place of work is generally the home of the worker, typically one 30 sq. m. brick walled room with a corrugated iron sheet roof. In Andhra as well as in other parts common working sheds may be provided to a group of workers. These are very basic with no light, toilet or other basic amenities.

Homebased workers do not receive any benefits apart from their wages in contrast to factory employed agarbatti rollers who receive provident fund, leave, medical and maternity benefits. Factory workers have a six day working week and are entitled to one month's leave with full pay. Medical and maternity benefits are covered under the Employees State Insurance scheme and 12% annual bonus and provident fund are provided for under the provisions of the Factories Act. In comparison, the lot of home workers is pitiable with no provisions for maternity leave, child care support or fall back arrangements during times of illness.

(Source: Hanumappa (1996), Kaur (1999), Krishnamoorthy (1999))

Occupational health concerns:

Agarbatti workers are specially vulnerable to postural and locomotive system problems due to highly confined and repetitious nature of their work as well as to skin problems due to exposure to Phthalic acid esters used in the production of agarbattis.

A detailed health study by SEWA in Ahmedabad in 1988 revealed the following health problems among women agarbatti workers: back pain, blisters on hands, body ache, chest pain, dizziness and exhaustion, eye problems, headache, nausea, neck pain, pain in abdomen, pain in limbs, shoulder pain, white discharge, heavy bleeding, early periods, drying of breast milk and itching or burning while urinating.

In a later comparative study of 4 home based occupations by SEWA, agarbatti workers complained most of back pain and pain in limbs. They also reported the other problems listed above. In terms of gynaecological problems, these workers complained of abdominal pain, irregular menstruation, urinary problems and white discharge. The study reported that no protective or preventive measures were taken by the workers as these could hamper speed and hence earnings and that little medical aid or counsel was available to them.

(Sources: Chatterjee and Macwan (1988), Chatterjee (1991))

The Policy Context

Impact of governmental policies:

In general, the liberalization of the economy and deregulation has had a positive expansionary impact on the agarbatti industry with increased exports, revenues and employment generation. However, certain areas of governmental inattention or anomalous policies hold back the progress of the industry. These are highlighted below:

Box 2: Women Workers and the Law in India

Minimum Wages

- Payment of Wages Act, 1936
- Minimum Wages Act, 1948
Coverage extends to labour in unorganized sectors.

Equal Remuneration for Equal Work

- Equal Remuneration Act (1976)
Applies to a large list of employment classes in the formal and informal sectors specified in a separate Schedule.

Social Security and Benefits

- Maternity Benefit Act, 1961: provides 12 weeks maternity leave and medical support.
- Employees State Insurance Act, 1948: provides health care and cash benefits in case of sickness, maternity and employment injury.
- Employees' Provident Fund and Miscellaneous Provisions Act, 1952: contributory provident fund, pension and deposit linked insurance.
- Payment of Gratuity Act, 1972: 15 days of wages for every completed year of service. Seasonal employees are entitled to 7 days wages for each season.

Applicable only in the formal sector.

Laws for Unorganized Sector

- Contract Labour (Regulation and Abolition) Act, 1970: provides for registration of establishments engaging contract labour, licensing of contractors, provision of welfare and health amenities for workers.
- Beedi and Cigar Workers (Conditions of Employment) Act, 1966: regulates conditions of work.
- Welfare Cess and Fund Acts (Covering workers in beedi, cine and mining industries): provide for collection of cess and creation of funds to administer welfare schemes.

International Conventions

Labour laws in India conform to the following International Conventions impacting upon women workers' rights:

- Equal Remuneration Convention (No. 100)
- Maternity Protection (Revised) Convention (No. 103)
- Discrimination (Employment and Occupation) Convention (No. 111)
- Human Resources Development Convention (No. 142)
- Workers with Family Responsibilities Convention (No. 156)
- Termination of Employment Convention (No. 158)
- Employment Promotion and Protection (Unemployment) Convention (No. 168)
- Employment Policy Recommendation (No. 169)

1. The industry is on an unsustainable growth path vis. a vis. the availability of key raw materials. The species *Maclilus makarantha*, the tree source for jigat powder, has declined considerably in South India and is currently being sourced from Uttar Pradesh. In the absence of targeted programmes to augment this species these supplies too will dry up while demand for jigat is predicted to grow by 50% over the next five years. A 40% increase in the demand for bamboo and 25% for charcoal in the same time frame is also predicted. Supply issues with respect to these are also not being addressed. Already the industry sources its bamboo splints from the far away North East. Shortages of raw material could jeopardize the economic viability of the industry and render thousands unemployed or displaced by substitutes. Efforts by relevant state governments to incorporate the raw material needs of the industry into their forestry and social forestry projects are urgently called for.
2. Currently the industry is taxed at multiple levels e.g. raw material taxes on bamboo, charcoal, jigat and aromas range between 25 to 90%, in addition to which a purchase tax on raw agarbattis and sales tax on the finished produce are levied. There is need to look at the tax structure in toto and determine if the burden of taxation is fair or whether it can be rationalized.
3. Different rates of taxation and differing labour law requirements across states creates an anomalous situation. For instance, Karnataka is the only state where the agarbatti industry falls under the purview of the Factories Act and which consequently has to pay wages somewhat in line with minimum wage requirements (wages for homeworkers have some relationship with and move in tandem with factory wages) and has to provide factory based workers with social security coverage. This along with much lower rates of sales tax in states like Bihar and U.P encourages the industry to migrate to these states to the detriment of the workers' cause. A uniform coverage of the agarbatti industry under the Factories Act in all states is called for.
4. So far the industry has received little R & D support from governmental or private sources. Based as it is entirely on forest based natural resources and manual, labour-intensive, non polluting techniques of production it stands to carve for itself a niche as a 'green' industry. However, support in developing new products (mosquito repellents, air freshners, aromatherapy incense), exploring new markets and developing more sophisticated marketing strategies has not been extended to the industry in any substantial measure. Given its huge employment generation potential this is regrettable. Of course, these efforts must be taken in tandem with measures to expand raw material supplies to fructify in terms of additional employment for the poor.

Issues for further study:

Keys gaps in the literature include:

1. A lack of reliable statistics on the total number of workers in the industry and their distribution, as well as their socio-demographic profile. All that is currently available are rough estimates or orders of magnitude not sufficient to either understand the magnitude of problems faced by the workers or to design appropriate legislative or policy measures to redress them.
2. Due to the homebased nature of the work there is absolutely no data available to gauge the degree of involvement of child labour in the industry, the age of entry of children into the work force, the number of hours spent by them in this work or the impact on their health and educational status.

3. While the factory based sector constitutes only 20% of the agarbatti sector workforce given the geographic concentration of the industry in a few pockets an effective implementation of labour laws and minimum wages can be expected to have some trickle down impact on the homebased sector in terms of keeping workers informed of the value of their work and in keeping some sort of parity in earnings between the sectors. The relationship between wages in the formal and informal components of the agarbatti sector needs to be explored further.
4. Conditions of work in emerging centres of manufacture in non traditional states such as Bihar and U.P need to be studied and compared to those in better regulated concentrations of the industry such as those in Mysore and Hosur in Karnataka. Emperical evidence is needed to verify whether infact the industry is tending to relocate and disperse to other areas to circumvent labour and tax laws and how this is impacting on existing workers.

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Chapter Three

Homebased Women Workers in Bangladesh with special reference to the Garment Sector¹

The Garment Industry - A Brief Overview:

The garment industry of Bangladesh has been rapidly expanding since the late 1970s. During 1977-78 only about Taka 1 lakh was earned from garment exports but by 1990-91 the figure had risen to Tk. 2,700 crores. The industry is the principal export earner for the country and the fourth largest employing sector with an estimated 350,000 workers.

(Source: Bangladesh Garment Manufacturers and Exporters Association (BGMEA) Bulletin)

The Production to Consumption Chain and where women are located along it:

In the garment export sector subcontracting chains are the norm. The principal firm (which has a quota under the MFA) retains the responsibility for quality control and farms out production to smaller firms. These in turn execute some orders and processes inhouse and subcontract others out. While tasks such as manufacture of wovens and knitwear are generally done in factory settings others such as embroidery, cutting and stitching may be distributed to homebased workers. The exact sequence of subcontracting chains and the links between various levels are not clear. It is also not clear what proportion of homebased production is linked to domestic consumption and what to the export sector.

The Economic Context

Estimated number of workers:

As per BGMEA estimates women constitute about 90% of the workforce in the garment sector while others put the percentage at around 80%. Thus there are about 280,000 to 300,000 women workers in the formal and semi-formal sectors alone. No estimates exist of the numbers in the homebased or informal sector but representatives of the Bangladesh Home Workers Association (BHWA) believe that the number could run into crores as entire families in rural areas in some district are engaged in traditional embroidery work. The BHWA's own membership consists of 14,000 workers spread over 5 districts. Another NGO, Bangladesh National Women Lawyers Association (BNWLA), engaged in organizing homebased workers has a membership of 3000 workers spread over 3 districts.

¹ The original terms of reference for this study pertained to homebased embroidery workers. As no relevant literature on the subject could be located this chapter combines information from three sources to construct a rough picture: i. studies on factory based women workers in the garment industry, ii. one or two preliminary (unpublished) studies on homebased workers and those in the informal sector and iii. personal interviews with embroidery workers in the Uttara, Mirpur and Mohammadpur areas of Dhaka as well as discussions with NGOs working with them.

Wages and Earnings:

As per a 1994 revision in the minimum wage schedule garment workers are entitled to a minimum wage of Tk. 930/ month and apprentices to Tk. 500/ month. As per a 1996 survey workers in the factory sector were earning above this level with an average take home wage of Tk. 1450/ month. However, women workers showed a lower earning averaging Tk. 1210 against male earnings of Tk. 1830. Discrimination against women workers in the unskilled class was found to be particularly strong with 42% women (as against 17% men) earning less than the statutory minimum.

Data for homebased workers is available from a 1997 survey of 629 homebased workers across 8 towns. While this survey covered all types of homebased women workers 37% of the sample consisted of embroidery workers and another 18% of tailoring work so it can be taken as broadly representative of the garment sector. As per this study homebased piece rate workers averaged an income of Tk. 21 per day which translates into monthly earnings of less than Tk. 600. Women working at rural production centres run by the Ayesha Abed Foundation (a subsidiary of BRAC) which sells their produce through the Aarong outlets within the country and abroad were reportedly earning Tk. 30 to 35 per day or roughly Tk. 700- 900 per month within the same reference period.

More recent information gathered by the author during a field visit in March 1999 through interviews with embroidery workers across three localities in Dhaka shows that the average worker makes between Tk. 650 to 750 per month. Those with small children and excessive domestic responsibilities may make even less at Tk. 500/ month while the exceptionally skilled earned in the range of Tk. 1000 to 1200 per month. Most workers said they got employment for some 200-240 days in a year while a very small proportion (working with an NGO through an agent) got over 300 days of employment in a year. It is important to highlight that these rates pertain to Dhaka city and the terms of employment in other parts of the country can be expected to be worse off.

Contribution of women workers to the sector:

While no estimates exist in value terms of the contribution of women workers it must be underlined at this juncture that the garment industry which constitutes Bangladesh's front running export earner and one of its largest manufacturing industries is run largely on the labour of women workers in the formal and informal sectors with men comprising barely 10 to 20% of the workforce.

Trade and marketing set up

The piece rate workers are basically confined to their homes and have limited contact with the outside world and little access to the market. Proprietors or their agents (sometimes older, somewhat better off women, sometimes men known to the family) contact them for making items as per specifications. Designs and materials are provided while the needles and frame are the workers' own. The finished pieces (cushion covers, tablecloths, kurta sleeves and front panels, sarees and duppattas) are collected by the agent and payment made on a monthly basis. The losses for poor quality or rejected samples are borne by the worker. Irregularity and delay in payments are frequent complaints by the workers but they are unable to protest for fear of reprisal in the form of withholding of future work. Attempts by workers to directly sell their produce to shops have not worked because of inability to invest in raw materials, refusal of shopkeepers to deal directly with workers and the fact that shopkeepers take goods on advance and their payments are even more delayed than those

made by agents. 62% of the women surveyed in the 1997 survey believed they were being under paid by their agents but expressed helplessness in tackling this.

It may also be pertinent to mention here that while many NGOs are active in this field, apart from a few cases where they run production centres and are in direct contact with workers, they too appoint agents (who may further have sub agents) and work in the sub contracting mode. Somewhat better wage rates, regularity of payments and more assured supply of work are however available to workers linked to the better NGOs.

The Social Context

Profile of the homebased worker:

The survey of 629 homebased workers showed that 93% were between 16 and 45 years of age, with a mean age of 28 years. The average educational level of the respondents was 4 years with 39% being illiterate, 26% with primary level, 30% with secondary level and 5% with higher level education. The majority of families are migrants from rural areas and 80% had no land resources. One third were wives of labourers and fishermen, whose incomes went towards meeting basic survival needs of the family. Another 50% were wives of tailors, petty traders and servicemen whose earnings constituted important supplementary income for the family while the remainder 17% reported no pressing economic reasons for working. 32% of the surveyed families were below the poverty line with family incomes of less than Tk. 2000 per month. The average family income reported was Tk. 3295 per month with 50% of the families earning below Tk. 3000 per month.

Conditions of Work:

A majority of workers put in 4-6 hours of work in a day. Their conditions of work were observed to be quite pleasant with a group of 4-8 women sitting together in a common compound or under a tree, after finishing their household tasks. Children were playing around and being simultaneously minded by the mothers. This contrasts favourably to conditions described in the literature for factory workers who are subjected to long hours, compulsory overtime, inadequate lunch and toilet breaks, very little leave and badly ventilated working environments with poor toilet facilities.

Occupational health concerns:

A fair amount of research has been done on occupational health hazards faced by factory based garment workers with female workers showing a greater incidence of illness attributable partly to lower wages and less adequate nutritional intakes but mainly to the fact that the most arduous jobs of operators and helpers involving long hours (12 hours) of working at machines and exposure to dyes, toxic fumes, dust and fibre particles were held by women. Only 8% of women workers were found to be holding the top jobs of quality controllers, supervisors and master cutters. The most frequent complaints were of cough, fever and general weakness (including fainting). 54% of women reported deterioration in eye sight after joining the industry and a high proportion (more than 25%) are vulnerable to urinary trouble. The literature also cites deteriorating mental health among women garment workers as an emerging concern. Generally, workers in the garment sector have a productive life spanning only a few years due to the adverse health impacts of working in the industry. On an average workers reported spending Tk. 95 per month on medical expenses.

Box 3: Women Workers and the Law in Bangladesh

Minimum Wages

In July 1994 Minimum Wages of Tk. 930 per month have being fixed for garment workers. For apprentices the minimum wage is Tk. 500 with a provision that after a training period of 3 months the worker should get Tk. 930/ month.

Equal Remuneration for Equal Work

Equality before the law is guaranteed by the constitution Article-27" All citizens are equal before law and are entitled to equal protection of law." Article-28(1)"The State shall not discriminate against any citizen on grounds only on religion, race , caste, sex.Article28(2) Women shall have equal rights with men in all spheres of the State and of public life.

Social Security and Benefits

- Shops and Establishments Act, 1965: regulates working conditions, hours of work, overtime and holidays and leave provisions.
- Employment of Labour (Standing Orders) 1965: covers all undertakings with more than five workers and relates to payment of wages and dismissal and termination procedures, provident fund coverage
- Factories Act, 1965: safe working conditions, canteen and recreation facilities, regulation of work hours, regulation of child labour
- Maternity Benefit Act, 1939: covers pre-natal and post natal leave but employee should have completed at least 9 months service prior to date of delivery
- Workmen's Compensation Act, 1923: payment of compensation for disablement, injury and death by accident.

International Conventions

Ratified:

- Discrimination (Employment and Occupation) Convention (No. 111)

Not ratified:

- Equal Remuneration Convention (No. 100)
- Maternity Protection (Revised) Convention (No. 103)
- Child Labour Convention (No. 138)

While no survey results are available for the homebased sector occupational health concerns can be expected to be milder than those above due to a non threatening, properly ventilated home environment with flexibility with regard to taking breaks or varying tasks. Women embroidery workers interviewed complained of backache, stiffening fingers and poor eyesight as their major problems and further stated that few can work beyond the age of 40 years due to the decline in health status.

The Policy Context

Impact of governmental policies:

1. The complete oblivion of government authorities and policy makers to the existence of homebased garment workers constitutes the biggest hurdle towards ensuring a better deal for these workers. There are absolutely no statistics or records which identify or enumerate these workers and no studies or reports exploring their linkages with and contribution to the formal sector. It is not clear to what extent the export sector relies on homeworkers and to what extent they cater to domestic demand. In the absence of any concrete data on the size and composition of the homebased garment sector, the main markets it caters to and the nature of its links with the formal, factory based manufacturing segment it is not possible to say much on the impact of government policies on this sector.
2. The literature however leads us to infer that governmental neglect of female education has a direct bearing on the status of women garment workers. While about 90% of the workforce in the sector is female only 8% of women workers occupy the higher paid slots in the industry. Labour market segmentation by gender is also obvious from the fact that male workers average a take home pay higher by Tk. 600 per month than women (female wages were 66% of male wages) and that a much larger percentage of women than men report being paid less than the legal minimum. A large part of this can be related to the fact that only 9% of women workers in the sector had more than 10 years schooling while the corresponding figure for males was 36%. While these figures are for the formal sector the situation can be expected further exacerbated in the homebased sector where limited social mobility in addition to low levels of education lead to wage discrimination against women workers.
3. It may also be hypothesized that the government policy of turning a blind eye to labour law violations and poor enforcement of fixed work hours, leave provisions, overtime allowances and decent working and sanitation conditions in the formal sector distort the market equation between factory and home based work. Due to the 'sweat shop' conditions prevailing in the factory sector manufacturers are able to extract greater productivity at lower costs at the expense of workers' health and long term productivity. Thus less work may be coming the way of homeworkers than would if the full costs of factory workers productivity were to be borne by employers.

Issues for further study:

As to date no comprehensive or focused study has been undertaken of homeworkers in the garment sector in Bangladesh, commissioning of such a study at an early date is recommended. The literature on the informal sector suggests that next to domestic service this may be the largest employer of women workers in the informal sector. Such a study would need to explore de novo all the topics highlighted above with a special emphasis on :

- The size, composition, rural-urban and geographic distribution of the sector.

- The main markets it caters to (e.g. domestic, exports, handicrafts etc.) and the main elements of demand (e.g. embroidery work, cutting, stitching, applique etc.)
- The subcontracting chains and how they operate in terms of margins and mark -ups
- The relationship of the homebased sector with the formal sector and the extent of substitution possible between the two
- Strategies for safeguarding minimum wages in the sector and bringing workers under the purview of protective legislation and social security coverage.

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Chapter Four

Homebased Women Workers in the Football (and Leather) Industry in Pakistan²

The Football Industry - A Brief Overview:

The football industry in Pakistan is concentrated mainly in and around Sialkot where footballs have been produced for nearly one hundred years, though exports only began around 1982. Pakistan is the single largest manufacturer and exporter of match grade footballs in the world and accounts for over 80% of total production. It is estimated that the industry earns approximately Pk. Rupees 3 billion in foreign exchange each year. For the 1994 World Cup the country exported 34.6 million footballs.

Starting out originally in a factory setting the industry has become predominantly homebased in the last two decades in response to several factors. Primarily the sharp escalation of international demand in a short time span of twenty or so years resulted in the acquisition of stitching skills by a vast majority of the population in the surrounding areas to take advantage of emerging opportunities. Simplification of stitching techniques and a decline in other economic opportunities reinforced the trend towards home production. The literature also suggests that there may be a connection between the introduction of social security legislation in the 1970s and the move out of factory settings.

Leather tanneries and leather based industries (e.g. garments, footwear, gloves, sports and other goods) contributed about Pk. Rs. 10 billion to the economy in 1994. The industry directly employed 200,000 workers and the value of exports in 1994 was US \$ 719 million.

(Sources: Save the Children (1997), HRCP (1995), Aurat Foundation (1998), LIDO (1994)

The Production to Consumption Chain and where women are located along it:

The production of each football is part of a larger chain with the stitching work itself constituting about 10% of the manufacturing process. The flow chart below details the production to consumption process:

Figure 3: The Production to Consumption Chain in the Football Industry

² The football industry is based on the synthetic material Rexine and it falls under the broad category of the Sports Good industry rather than the Leather Industry. However, since this was not clear at the start of the study data on both industry segments was collected. The chapter has been written with a primary focus on the Football industry but wherever literature relevant to homeworkers in the Leather Sector was available it has also been cited.

The designs and production standards are generally set by overseas buyers and conveyed to manufacturers. Most of the materials are increasingly locally manufactured. There is little direct contact between the manufacturers and the workers. The work of stitching footballs is done entirely on contract basis. Factories hand over unfinished balls to the contractors who then distribute the work to both stitchers at home and in the smaller workshops. The bigger contractors have approximately three hundred stitchers working under each of them. Wages are paid by piece and the margin of the contractors varies between Pk. Rs. 3 to 5. Poor quality work has to be re-done by the workers at their own cost.

Details of subcontracting chains linking homeworkers to manufacturers of footwear and other goods in the leather sector were not found anywhere in the literature.

(Sources: (Sources: Save the Children (1997), HRCP (1995))

The Economic Context

Estimated number of workers:

No estimate could be found of the number of workers in the football industry. The Aurat Foundation study (1998) estimates that a total number of 159,000 women workers may be engaged in the leather sector including football stitching, stitching of gloves, shoe soles and *khussas*. The majority of these are home-based piece rate workers. Very little female labour is engaged in tanneries though smaller tanneries employ child labour (generally young boys from the Christian community) to a significant extent. Female labour is essentially involved in stitching activity related to the manufacture of leather goods. As per one estimate about 40% of footwear manufacture is out sourced by the manufacturers to the informal sector.

(Sources: Aurat Foundation (1998), IPEC-Sudhaar (1998))

Wages and Earnings:

Courtesy a steady and bouyant demand in the world market and Pakistan's pre-eminent and unchallenged position in it, earnings in the football stitching segment are high compared to other work in the home based sector. Depending on quality workers get paid between Rs. 18 to 35 per piece. On an average families produce 6 to 7 balls per day and earn between Rs. 150 to 250 a day. Earnings per adult worker are in the range of Rs. 75 to 100 a day and there is no difference in rates paid to men and women at the home level. Average male

earnings however tend to be higher as more men work in stitching centres (only 2% of stitchers in centres are women) where prevailing rates are higher. For the more skilled workers there is a steady year round supply of work (except for 2 months in the monsoons) while for the others its availability is more sporadic. Higher quality and consequently better paid work is concentrated in and around Sialkot while lower grade ball manufacture is farmed out to the rural hinterland, where earnings are thereby lower.

Piece rate work related to the stitching of gloves, khussas and foot soles in the leather sector is extremely poorly paid. As per the survey done by Aurat Foundation women in Faisalabad reported earning Rs. 0.75 per dozen gloves, translating to an earning of Rs. 3.75 per day for a production of 60 pairs a day. Further such work was only available for about 2 days in a week. Similarly, homeworkers in Multan reported an earning of Rs. 5/ day in making soles and Rs. 13 / day in khussa embroidery work. Further there was a paucity of work opportunities and work was available for between one to four days in a week. Clearly the earnings of workers in these sectors are well below minimum living wages.

(Sources: Save the Children (1997), HRCP (1995), Aurat Foundation (1998))

Contribution of women workers to the sector:

There is no clarity in the literature regarding the contribution of women workers to the sector. The 1997 Save The Children report estimated on the basis of a survey of 428 households across 30 villages that 58% of the workforce involved in football stitching was female. Assuming a 10% share for stitching in an annual football production value of Rs. 3 billion would put women workers' contribution equivalent to Rs. 17.4 million per annum. However, a later (to be published) report by Save the Children which covered 1,155 households across 18 villages suggests that female participation rate may be lower at around 34% and that women workers may be contributing about 22% of the output of completed balls. It is not clear how much of this variation can be explained by differences in sample size and estimation methods between the two studies and how much by an actual decline in the number of women workers due to an increasing degree of stitching in centres (as against home production) in the wake of international pressure against child labour.

(Sources: Save the Children (1997), Save the Children (forthcoming))

The Social Context

Profile of the football worker: Men, women and children all constitute a significant part of the workforce engaged in football stitching. The 1997 Save the Children survey report suggests that 23% of family earnings in stitcher families come from the labour of children. This tallies also with HRCP estimates that some 20 to 25% of the labour involved in the process is that of children. Of the adult labour force 58% were women and the remainder men. A subsequent survey however shows that while women tend to be partially involved in the work, men engaged in the industry tend to be full time workers with a proportionately larger share in the production. Of the entire football stitcher work force about 70% stitch the complete football while the remaining 30% are involved in process stitching stages. Of the complete stitchers 50% are men and only 20% women while women constitute 21% out the 30 % involved in process stages. The study also reports that a significant number of girls (13.6%) are reported to be stitching in the age group 7-13 years, as against only 2% of boys in the same age group.

In terms of socio-economic profile, about 80% of the sample surveyed used child labour and the remainder 20% did not. The former group had a mean family size of 7.9 and mean household income of Rs. 2,927. 66% of the households had monthly incomes below Rs. 3000 and only 6% had incomes above Rs. 5000. 68% of the families were landless and 83% reported being under debt. The profile of the second group was somewhat better with a mean monthly income of Rs. 4,554, fewer families under the Rs. 3000 level and a lesser degree of landlessness and indebtedness.

(Sources: Save the Children (1997), Save the Children (forthcoming)), HRCP (1995))

Conditions of Work:

The work involves stitching together cut and shaped pieces of the football. The most common design contains 32 such panels. The edges of the pieces are earlier perforated through which the needle is passed, the thread is then pulled by both hands to fasten the stitch. After stitching most of the pieces together, the ball is turned inside out and the last pieces are then stitched on. The ball is then sealed using a complicated “blind stitch” requiring considerable skill and dexterity. A full time stitcher would put in approximately 8-10 hours of work each day while family labour (women and children) may put in equivalent or lesser number of hours depending on the number of family members available for the task.

The HRCP study points that while the working environment in workshops was found to be dreary and poor lighting could possibly strain eyes, in the home setting workers usually worked in open courtyards or in the shade of trees outside their homes. Consequently they did not look as fatigued or bored as their counterparts in the workshops. These observations tally with those emerging from the agarbatti and garment sector studies.

The study of homeworkers by Aurat Foundation does however point out that living quarters in urban areas range between 50-150 square yards and those in rural areas between 150-250 square yards and given that these accommodate families of 6-10 members, their use as work space encroaches on precious living space for the family.

(Sources: HRCP (1995), Aurat Foundation (1998))

Box 4: Women Workers and the Law in Pakistan

Minimum Wages

- Minimum Wages Ordinance, 1961

so far coverage does not include any informal sector work

Equal Remuneration for Equal Work

- Guaranteed via Article 25 (Fundamental Right) of the Constitution which decrees that there shall be no discrimination on the basis of sex alone and upholds the principle of affirmative action for women.

Social Security and Benefits

- W.P Maternity Benefit Ordinance, 1958: entitles a woman worker who has worked with a concern for a minimum of 4 months to a maximum of 12 weeks paid leave. It protects against dismissal during maternity leave.
- Factories Act, 1934: specifies that a woman's work hours cannot exceed 48 hours/ week, forbids night work for women in factories and further specifies hours of work. It bans carrying of heavy weights and operating particular machinery for women workers.
- W.P Shops and Commercial Establishments Ordinance: covers basic safeguards for workers concerning working hours, holidays, time and condition of payment of wages, leave and termination conditions.

Applicable only in the formal sector with 10 or more employees

Laws for Unorganized Sector

Currently there is no legislation covering workers in the informal sector.

Note: The overall legal position of women in Pakistan has deteriorated over the last 10-15 years due to the prevalence of Islamic Laws specifically the Qanoon-e-Shahadat and Haddood laws.

Occupational health concerns:

Not much insight is available from the literature on occupational health hazards faced by adult workers in the football sector. Child stitchers report back and knee pain from sitting with the clamp for holding football pieces between their knees and bending forward to stitch. They also report eye strain and headaches and the development of callouses on their hands. The seriousness of these hazards depends on the hours spent stitching, the extent of breaks taken and the conditions (e.g. degree of light and ventilation) of work. In the home situation these risks are largely minimized: women and children rarely stitch for hours without breaks but fit this around other household activities such as feeding animals, cooking, fetching water and fodder, taking care of younger children and recreation.

(Source: Save the Children (1997))

The Policy Context

Impact of governmental policies:

1. There is little discussion in the literature with respect to the impact of governmental policies on the sector. However, government policies have been largely supportive of export based industries and both the football and leather products sectors have been expanding and it can be reasonably presumed that employment and incomes in these sectors have been favourably impacted upon.

2. There is a large gap in the coverage and actual enforcement of labour laws between the formal and informal sectors. This encourages certain anomalies in the production structure e.g. large footwear firms often out source a substantial portion of their production to the informal sector to circumvent labour laws, while continuing to market or export under their own labels. Governmental agencies turn a blind eye to these practices whereas a more rigorous application of the law could result in some benefits being passed on to informal sector workers associated via sub contracting chains to formal sector manufacturers.

3. It is not clear what the government stance has been vis a vis the international outcry against child labour in the football industry, which has undoubtedly impacted negatively on the industry in the short run. The international movement against child labour is forcing onto the industry a more factory based, male dominated work force profile from its existing homebased, family labour orientation. This may not necessarily impact positively in terms of family welfare. The government perhaps needs to take a stance highlighting these aspects while at the same time playing a more proactive role in terms of launching well targeted programmes in the area to provide incentives to enhance the participation of children in schools and other welfare measures directed at rooting out the need for child labour.

Issues for further study:

1. While the break up of male, female and child workers in the football industry is available from survey results there are no estimates available of the total labour force involved in the sector. For the leather sector very rough estimates based on broad assumptions are available. More reliable estimates based on some sort of enumeration or sampling are required as is a break up in terms of various activities e.g. stitching soles, covers, gloves etc.

2. The impact of the international anti -child labour campaign on availability of work to women stitchers needs to be studied and quantified.

3. There is a move by some international agencies to promote sex segregated work centres for women workers with facilities such as transport etc. The attitude of women to these centres need to be ascertained and their feasibility explored both in relation to conservative social attitudes prevalent in Pakistan and in terms of women to participate in such alternate arrangements given their domestic and child care responsibilities.

4. The impact of the progressive masculinization of the football industry in terms of decreasing incomes available to women and children need to be studied further from the angle of changed expenditure patterns and declining expenditure on nutrition, health and other family consumption needs which women prioritize higher than men.

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Chapter Five

The collection and trade in medicinal and other herbs in Nepal (with special emphasis on the role of women)

Herb collection and trade - A Brief Overview³

Approximately 100 species of medicinal, aromatic and other herbs are collected on a regular basis from forest lands in the middle hills and high mountains of Nepal and traded to India. The trade is historical, finds reference in ancient Sanskrit literature and may date as far back as 3000 years ago. Current estimates put the volumes harvested at between 10,000 t to 15,000 t per year and the value of trade equivalent to US \$ 8.6 million per annum at 1993-94 prices - four per cent of the total contribution of forestry to the national economy.

The Production to Consumption Chain and where women are located along it⁴

It is estimated by one source that 99.9% of the production of medicinal and aromatic plants in Nepal is from wild sources and a minute 0.1% from cultivated sources. However, while this may be representative of the higher altitude districts, in the central region a sizable proportion of the total production of tree based products like ritha and cinnamon is cultivated on private terrace risers. Local processing and direct export out of Nepal are minimal and various estimates suggest that between 90% to 98.5% of the produce finds its way to Indian wholesalers, who distribute it between the Indian processing industry, retail trade and export. Figure 5 describes the production to consumption chain for the herbal industry.

There seems to be some sort of gender segregation prevalent vis. a vis. the collection of herbs but the exact arrangements differ from region to region. According to Sinha et al. (1993) women and children are exclusive collectors of ritha (*Sapindus mukorossi*) and churi (*Madhuca butyricea*). Men and women participate equally in Timur (*Zanthoxylum armatum*) collection and men provide the principal labour input in the collection of *Parmelia* lichens, cinnamon bark (*Cinnamomum tamala*) and jatamansi (*Nardostachys grandiflora*). In contrast Hertog (1997) found the collection of *Parmelia* lichens to be in the hands of women in Salyan district. As a broad generalization it may be ventured that collection of more accessible plants is done by women and children supplementary to collection of fuel, fodder and animal bedding while special collection forays in remote and difficult locations is undertaken by organized groups, mostly male.

Post harvest operations such as cleaning, sorting, grading, drying and packing, to the extent that they are done, are carried out mostly by women. Trade is predominantly in the hands of men, who may be retaining a large share of the profits consequently.

Figure 5: The Production to Consumption Chain in the Herbal Industry⁵

³ Source: Edwards (1996)

⁴ Sources: Edwards (1996), Hertog (1997), Olsen (1997), Sinha et. al. (1993)

⁵ Source: Edwards (1996)

The Economic Context

Estimated number of workers⁶

Karki (1995) provides an estimate of 100,000 people finding direct employment in the non timber forest produce economy. The division between men and women is not available but given that women play a more predominant role in the agrarian economy in the hills of Nepal and India (with men often migrating to jobs in the plains) the share can be expected to be higher than 50% with women, along with children, constituting anywhere between 60 to 80 percent of the workforce involved in this activity.

Wages and Earnings⁷

A few estimates of earnings from non timber forest products collection are available from select catchments. Olsen (1997) estimates that in Gorkha district average income from collection can range between Np. Rs. 50-200 per day compared to Np. Rs. 20-30 for agricultural activity. However, earning opportunities are present for only a few months after the monsoons and not throughout the year. Hertog (1997) estimates average annual income from herb gathering to be in the range of Np. Rs. 2000 per household in Salyan district, while an earlier 1991 estimate by the King Mahendra Trust for Nature Conservation estimates an average cash income of Np. Rs. 3000 per household for the Koshi hills region. These amounts while small in absolute terms are nevertheless very important to rural households as they may constitute as much as 50% of all cash income available to them. In a survey of 100 women in Monipur by FAO/ SIDA two-thirds reported forest product collection as their only source of cash income.

Contribution of women workers to the sector:

Though there is considerable literature on the non timber forest products economy in Nepal none of it is gender specific. Oblique references in the literature suggest that most specialist collectors (i.e. collectors of high altitude high value products) are men, with women along with children forming the generalist category of collectors who do this work incidental to other tasks such as fuel and fodder collection and whose domain are the lower value herbs. The literature however also mentions that groups of single, young women may also engage in specialist collection but there is no indication of the extent of participation. Low value products are estimated to contribute about Np. Rs. 130 million per annum at 1993-94 prices or 35% of the total value of trade and this can be pegged as a low level estimate of the contribution of women. In addition to this women also participate in the collection of some easily accessible but high value products like chairata and lichens and are critical to the post harvest drying etc. and transportation of high value herbs collected by the men.

Trade and marketing set up⁸

A multi-tiered trade set up connects harvesters in Nepal with consumers in India and across the world. After harvest the produce is portered to collection points on road-heads from where it is loaded on to lorries for transport to India. In the more remote districts the collection points are the domestic airstrips. Between the source and the markets in India the raw materials are normally handled by four levels of intermediaries. The first three - village

⁶ Karki (1995)

⁷ FRSC (1993), Hertog (1997), Kadel et. al. (1996), Olsen (1997)

⁸ Sources: Edwards (1996), Olsen (1997), Sinha et. al. (1993)

traders, road head traders and Terai traders, each handling progressively greater volumes - are Nepali. From the Terai traders the produce is passed on to numerous agents and buyers from India.

A vast network of village traders spread across the countryside constitutes the first level of the marketing chain. While some of these traders function independently most are agents of road head traders, who supply them with monetary advance which in turn are distributed to collectors. The relationship between harvesters and village traders is particularly close and governed by rules of kinship and mutual trust. The trade at this level is rarely exploitative and the village trader earns only a fair return on his investment.

At the next level village traders and independent harvesters sell to road head traders, who in turn deal with the visiting Terai traders. Often road heads are also district centres and coordination with the District Forest Officers and obtaining of necessary permits and passes is done at this level. Trade at the road heads is believed to be very competitive and Olsen (1997) estimates that these traders do not have margins above 3%, if that much, after deducting all costs and stand in considerable risk of making occasional losses.

Trade at the next level is concentrated in the hands of a small and powerful group of Terai traders, who function somewhat oligopolistically by preventing new entrants and maintaining price levels. Olsen (1997) puts the average net margin at this level at as high as 31.5% and argues that these traders maintain their position by controlling price information from India and by functioning as a passive oligopoly.

At the final level are the Indian traders based in Delhi, Calcutta, Bombay, Hyderabad and a few smaller north Indian towns. Calcutta and the perfumery town of Kannauj are important destinations for produce from Nepal due to their proximity. At each centre there are wholesalers and commission agents who buy from the Terai traders and sell to the indigenous medicine and essential oil industries and to the retail trade in crude herbs. Export to other countries is also routed through the Indian trade network with direct international flights proving uneconomical except in the case of a few very high value products.

While the popular perception is that the trade in herbs is very exploitative and collectors get a minuscule proportion of the final price more in-depth research does not bear this out. Edwards' research shows that for Chairata harvesters get about 50% of the final raw material price while Olsen (1997) calculates that for six main traded products the collectors' average net margin is 46.6% of wholesale prices in the Delhi market. Given the difficult mountainous terrain and the prohibitive costs of transportation and distribution these are not unreasonable. The country could however, enhance its returns from its herbal resources in the form of greater employment and profits by value added processing and direct overseas exports.

The Social Context

Profile of the herb gatherer⁹

As per the literature those who collect non timber forest products are often from poorer ethnic groups, partly because traded herbs - especially high value ones - come from remoter, high altitude locations where poverty is endemic: Sherpa, Limbu and Rai in east Nepal, Gurung and Magar in the centre, poorer Brahmin and Chettri in the west, and Tamang groups throughout. In the Terai the Tharu, who are frequently poor, collect a range of forest products whereas in the Siwaliks these are collected by landless Chepang who depend upon

⁹ Source: Edwards (1996)

them for their livelihood. The majority of non timber forest products in the Annapurna region are harvested not by the resident Gurung farmers but by poorer, landless, Tamang immigrants. Numerous poor Nepali collectors from the far western development region also harvest from the neighbouring Garwhal Himalayas in India.

Conditions of Work and Occupational health concerns

Given the rural context and independent nature of collection activity little emphasis is placed in the literature on these aspects. A lot of the gathering activity has no special time allotted for it and is done incidental to other subsistence foraging. Specialist gathering activity is done in a communal fashion over a week -ten day period and may have ritual and social significance attached to it in addition to its economic dimensions. To a certain extent child labour is an issue but given the remoteness of the regions concerned, the lack of educational opportunities available and the general agrarian structure of the economy it is more an academic than a real one. Some occupational health problems related to traversing long distances in the hills and to portering huge loads may be hypothesized but the literature is silent on their prevalence or extent.

The Policy Context

Impact of governmental policies¹⁰

While stated government policies play a great degree of emphasis on promoting the fair and equitable utilization of non timber forest products for maximizing the income and returns to resource poor collectors and on decentralization and devolution of forest management powers to local bodies, the actual laws and their implementation go contrary to the interests of the poor. These have been highlighted variously in the literature (see also Box):

1. The devolution of forest management functions to formal Forest User Groups has resulted in the displacement of women and marginal farmers who were the decision makers in the informal, local dispensation. Hertog (1997) highlights that before forest management responsibilities were formalized and handed over to state sponsored committees women made day to day decisions on forest management. But women's role in informal decision making is being undermined by the new organizations as most of them are illiterate and unable to take on the positions of officebearers or to engage in book-keeping etc. Thus leadership and financial control are passed on to men in the process of setting up of new institutional mechanisms aimed at decentralization.

2. With the overt aim of ensuring sustainable harvesting of non timber forest products the 1993 forest legislation makes it mandatory for all collectors, whether individuals or traders, to obtain collection permits from the District Forest Officer specifying the area and collection volumes. Given the large number of collectors involved the scheme is administratively unfeasible and unlikely to ever achieve its purposes of regulating harvests at sustainable levels. What it does accomplish

¹⁰ Hertog (1997), Olsen (1997)

Box 5: NTFP Collection and the Law in Nepal

Various successive laws restrict collectors control over medicinal and aromatic herbs:

Forest Products (Sales and Distribution) Rules 1970:

- Collection permits needed south of Mahabharat range.
- transport permit needed before taking produce out of district
- royalty payments imposed

Forest Act 1993

- except private forests utilization only as per government approved plan
- license for removal, sale, transportation and export in government forests
- royalty fees enhanced substantially
- forest personnel empowered to conduct searches, impound goods, undertake arrests, conduct investigations and file cases.
- severe punishments including confiscation, fines, imprisonment upto five years

Forest Rules 1995

- right to collect, sell and distribute may be auctioned to highest bidder
- powers of District Forest Officer extended to community forests
- trade in species not mentioned needs sanction from government
- government empowered to impose bans on collection, use, sale, distribution and export of any forest product

International Legislation

- In March 1994 India introduced negative list of exports of number of plants and their derivatives. Among them are several of the most important species supplied from Nepal and this has had a negative impact on prices to Nepali collectors.
- The Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) has had limited negative impact on collectors' income from one species.

however is to provide the forest bureaucracy with tools for harassment of and extraction of bribes from poor collectors ignorant or uncompliant of the law.

3. Legislation on the transportation and export of non timber forest produce and requirements relating to the payment of royalties discriminate against individual sellers and small traders and in favour of larger traders from the Terai and India. As District Forest Officers do not accept royalty payments from small operators these are forced to sell their produce within the district even if better prices may be available outside. Also royalty rates which are meant to be ten percent of market price tend to be irrational given the wide disparity in prices across regions and years, and need to be reviewed.

4. The imposition of export bans on nine species believed to be vulnerable or endangered has not succeeded in curtailing exports as this is done surreptitiously and under false names (or names of species not banned). However, by curtailing the legal market available to sellers and by introducing additional costs associated with their smuggling it does depress prices and collectors' incomes. Also it is argued in the literature that these bans are not adequately justified or necessary even in terms of biodiversity conservation.

5. While some changes are evident in recent times, by and large governmental policies have been neglectful of promoting indigenous industry and value added processing within the country, which would have resulted in greater employment and incomes. Also direct exports to other countries, though likely to be economically feasible only for a limited number of high value products, need to be more actively explored and supported.

Issues for further study:

From the perspective of this study the key gaps in the literature include:

1. No precise estimate exists of the number of collectors and the break up into men, women and children thereof. The degree and extent of participation of each of these in the overall economy of the sector also needs to be established.

2. The issue of segregation of product collection by gender is eluded to in the literature and needs to be explored more fully. Similarly, there is the segregation of tasks by gender as well. The extent of discrimination against women collectors and the impact of both these factors on women's earnings and family expenditure patterns merits closer attention.

3. The impact of recent government initiatives to promote Forest User Groups on women's control over forest resources and role in decision making needs to be documented further and examined with a view to introducing mitigative measures.

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Chapter Six

A Summary of Main Findings and Key Issues

Women play a key economic role in the sectors under consideration

In almost all the sectors surveyed women were found to be playing a key role in the production process:

- The agarbatti industry contributes roughly Rs. 8.5 billion (US \$ 240 million) annually to national income in India, had an export value of US \$ 112 million in 1993-94 and employed approximately 500,000 workers. 90 % of the labour in the industry is supplied by women, 80% of them homebased workers.
- The garment industry in Bangladesh contributes over Tk. 2,700 crores (US \$) per annum to the economy, is the country's principal export earner and fourth largest employer. 80 % of the labour used by the industry is that of women workers.
- Pakistan is the single largest manufacturer and exporter of match grade footballs in the world and accounts for over 80% of total world production. It is estimated that the industry earns approximately Pk. Rupees 3 billion in foreign exchange each year. An estimated 58% of football stitchers in the industry are home based women workers.
- The medicinal plant and other non timber forest products trade from Nepal has an estimated annual value of Rs. 500 million (US \$8.3 million). The sector employs over 100,000 people and contributes around 4% of the share of forestry to the national GDP. While no data is available on the gender division of labour in this sector forest product collection is predominantly the work of women.
- Women held a very important position in the coir sector in Sri Lanka historically but there has been a decline in their participation in this activity following the modernization of the industry. Currently, they constitute no more than an estimated 10 % of the work force. However in India, which is the dominant producer of coir in the world (the industry earns foreign exchange in the range of US \$ 63.75 million per annum) women are the predominant source of labour. The industry employs between 4.91 to 5 lakh workers, of which 80% are women.

Major problems faced by homebased workers

Occupational and Wage Discrimination against women workers is pervasive

Discrimination against women takes place in two distinct ways: 1) they are relegated to the lower paid work within the sector, with better pay work being the domain of male workers and 2) they are oftentimes paid less for the same work as their male counterparts.

Instances of occupational discrimination found in the sectors studied include:

- While female labour dominated the coir industry in Sri Lanka for centuries as long as the work was manual and arduous, with the emergence of the modern, export oriented mechanized brown fibre industry with higher paid jobs the coir industry was almost totally masculinized and women hold only peripheral, lowly paid jobs in the brown fibre segment.
- In the agarbatti industry in India female labour is engaged primarily in the tedious and physically onerous rolling activity and to a smaller extent in packaging. The high value task of mixing perfumes is entirely a male preserve, as are the administrative, supervisory and sales positions.
- In the football industry in Pakistan men hold the more regular and better paid jobs. Only 2% of the workforce in stitching centres (where wages are higher than home wages) are women. Even in the home segment men occupy the better earning slots: of the entire football stitcher work force about 70% stitch the complete football while the remaining 30% are involved in process stitching stages. Of the complete stitchers 50% are men and only 20% women while women constitute 21% out the 30 % involved in process stages.
- In the garment sector in Bangladesh the most arduous jobs of operators and helpers involving long hours (12 hours) of working at machines and exposure to dyes, toxic fumes, dust and fibre particles were held by women. While women constitute 80% of the workforce only 8% of women workers were found to be holding the top jobs of quality controllers, supervisors and master cutters.
- While no firm data is available on this aspect the literature from Nepal suggests that the collection of higher value high altitude herbs is almost exclusively the preserve of males while women collectors are dominant in the lower value segment of forest produce. Also trading is done predominantly by men who consequently control income from collection.

Instances of wage discrimination emerging from the study:

- Female wages were found to be 66% of male wages in the garment industry in Bangladesh. Discrimination against women workers in the un-skilled class was found to be particularly strong with 42% women (as against 17% men) earning less than the statutory minimum.

Low Wages:

Except for the football sector in Pakistan earnings in all other sectors were found to be abysmally low:

- A survey of 500 coir workers in Sri Lanka (80% from the traditional industry the remainder 20% from the brown fibre sector) revealed that income levels are low with 77% of the respondents earning less than SLRs. 1000 per month and less than 5% reporting earnings of over SLRs. 3000 per month. A large number are involved additionally in manual labour, petty trading and other supplementary activities in addition to agriculture to meet basic survival needs.
- Interviews with embroidery workers across three localities in Dhaka shows that the average worker makes between Tk. 650 to 750 per month. Those with small children and excessive domestic responsibilities may make even less at Tk. 500/ month. This is well below the minimum wage of Tk. 930/ month fixed by the law for garment workers.

- In the agarbatti sector earnings vary across states with workers in Karnataka appearing to be somewhat better placed in contrast to their counterparts in Gujarat and Andhra. Workers here manage an effective wage rate of Rs. 36 per day and on an average manage to earn about Rs. 1000 per month. In Gujarat, the rate is much lower and combined with lower productivity rates yields the workers incomes in the range of Rs. 325 per month. In Andhra earnings for a family of six were reported in the range of Rs. 400 to 800 for a six day week implying an effective wage of Rs. 12 to 20 per day.
- Piece rate work related to the stitching of gloves, khussas and foot soles in the leather sector in Pakistan is extremely poorly paid. As per a survey done across a few cities women in Faisalabad reported earning Rs. 3.75 per day for a production of 60 pairs of gloves a day; homeworkers in Multan reported an earning of Rs. 5/ day in making soles and Rs. 13 / day in khussa embroidery work. Clearly the earnings of workers in these sectors are well below minimum living wages.
- Results from surveys done in various parts of rural Nepal show that on an average households earn Rs. 2000-3000 per annum from the collection and sale of medicinal and other herbs from forests. The collection work of course is seasonal and not carried out throughout the year.

Terms of payment are insecure

This issue arises due to the exclusive reliance of home workers on their agents and middlemen for work. Some of the common problems reported across sectors were deliberate miscounting, rejection of finished goods, penalizing workers for bad quality work while retaining the goods, cheating in weighing etc. Since a large segment of home workers are illiterate they have no accurate written records and can rarely argue successfully about deductions. Their wages are also paid irregularly and in some cases only partial payments are made to keep the worker tied to the employer. In some instances (e.g. football stitching and medicinal herbs) the interaction with the contractor or trader was handled by men in the family. While this reduces cheating it also reduces the access of women to their own earnings.

There is a paucity of work available

While work availability was found to be somewhat regular and adequate in the case of football stitching and agarbatti, women workers in the other sectors faced a great measure of employment and income insecurity. Embroidery workers in Bangladesh reported getting work for about 200-240 days in a year and piece-rate stitchers in the leather sector in Pakistan reported availability of work as varying between one to four days in a week. Coir workers in Sri Lanka also reported the need to be engaged in multiple economic activities to make ends meet. This lack of availability of work weakens greatly the position of home workers vis a vis their employers. They are unskilled and therefore easily replaceable. Any pressure, protest or demand regarding wages, irregular payments or unfair practices carries the threat that the work will go elsewhere and hence is avoided by the workers.

Social security needs are not met

Homebased workers who constitute 80% of the workforce in the agarbatti industry do not receive any benefits apart from their wages in contrast to factory employed agarbatti rollers who receive annual bonuses, provident fund, leave, medical and maternity benefits. In the garment sector in Bangladesh the law provides for medical and maternity benefits, protects against unreasonable termination of services and makes provision for leave. In comparison, the lot of home workers is pitiable with no provisions for maternity leave, child care support

or fall back arrangements during times of illness. Similarly, respondents in a survey of coir workers in reported that no support system or facilities were available for pregnancy, childbirth and child care. More than half the respondents were unable to withdraw from work to meet their maternal needs and only about a third were able to do so after childbirth. These women adopt a range of strategies to combine child care needs with their economic activities - e.g. working while children are asleep, entrusting child care to older siblings or extended family members, sending children to the fields or pre-school etc. By and large homebased workers struggle to combine multiple needs without any institutional or state support. Moreover, the working life span is relatively short for these workers combining as they do the multiple burdens of housework, child bearing and piece rate work, with few workers retaining the health to carry on working beyond the age of 45 years. No old age pension or savings income is then available to them as support through their unproductive years.

Women's' work is invisible

The complete oblivion of government authorities and policy makers to the existence of homebased workers constitutes the biggest hurdle towards ensuring a better deal for these workers. There are absolutely no statistics or records which identify or enumerate these workers and no studies or reports exploring their linkages with and contribution to the formal sector. In none of the countries or sectors under the purview of the study were reliable official statistics available on the number of home based workers extant. Employers and industry associations also do not keep records and downplay the numbers involved to circumvent existing and possible labour legislation. Even where focused attempts are made at the household or micro study level to gauge women's' involvement and contribution to the economy social attitudes conspire to keep a veil on women's contribution. Women themselves do not perceive their work as valuable or worth reporting and male household members are dismissive of women's' contribution in order to preserve the culturally acceptable image of males as principal breadwinners for the family.

In most industries child labour is an intrinsic part of the home based work situation

The participation of children to a greater or lesser extent is an inseparable part of the home work situation. SEWA suggests the assumption of two adults and two children as one production unit while working out minimum wages for the homebased sector. This seems validated by whatever evidence is available from the sector studies. Studies from Pakistan show that 20-25% of the labour involved in stitching is children and that they contribute about 23% of total family income. In the agarbatti industry in India while the woman of the house may be the main worker she is helped by an average of two children. Frequently entire families of 6 to 10 members are engaged in the activity. Women coir workers in Sri Lanka surveyed also reported that one-third of them started working before the age of 12 and over half of them did so below the age of 15 years. Children (especially girl children) also assist their mothers in tailoring and stitching activities (though not so much embroidery which requires more skill) and young children in the hills are part of family forays into forests to gather wood, fuel and plants of economic value.

Why women continue to be trapped in this low income trap:

Lack of Social Mobility

Social attitudes through much of South Asia, especially in Pakistan and Bangladesh, look down upon and ostracize women who move out of the home setting. In these circumstances home based work is the only income opportunity available to many women workers. Restrictions on movement and on inter-acting with outsiders further leaves these workers

with little knowledge of markets and prices and little ability to function outside the highly circumscribed boundary of their relationship with a particular agent or employer.

Lack of Education and Skills

Lack of education and any formal training or skills in their trade puts women workers at a disadvantage and unable to raise their status. Illiteracy makes them vulnerable to cheating and mal practices while the low skilled nature of work makes the threat of replacement a constant one. As per a survey of home workers in Bangladesh the average educational level of the respondents was 4 years with 39% being illiterate and another 26% with only primary level education. For Pakistan survey data is available on a city wise basis and shows illiteracy levels of 55% in Lahore, 75% in Faisalabad and Sialkot and 95% in Multan in the homemaker segment. Data is not available for educational levels of home workers in India and Nepal but there is little reason to believe that it would look very different.

Women in the southern coir districts of Sri Lanka showed educational attainments higher than the national average and over 38% reported to have had over 10 years of schooling but ironically this had not translated into a better position for them within the coir industry. Instead educated women have responded by moving out to higher status employment.

Lack of Market Information

Lack of ability to approach the market directly is a large part of the reason why women workers are bound into exploitative work relationships. In most of the sectors studied women do only a part of the work and are not familiar with the entire process. For instance both the football and garment industries are export oriented and work on the basis of designs and specifications supplied by overseas buyers, beyond the reach of workers. Similarly, in agarbatti production while the basic process of manufacture is simple and the costs of basic ingredients low, a great deal of secrecy surrounds the actual mixing of perfumes which give each brand its distinctive character. Other elements of brand differentiation include packaging and advertising, which together with perfuming account for 60% of total costs. Another 30% is spent by manufacturers on transportation, marketing, dealers margins etc. Given that as much as 90% of the costs are linked to brand definition and marketing considerations, there is little scope for workers to directly engage in this sector or to seek any sort of independent or self-employed status within the industry. They remain firmly linked to the factories via contractors as piece-rate workers. In the case of the medicinal plant trade in Nepal as well, 98% of the produce is exported to India which in turn either converts it into value added products or re-exports to the world market. Local sellers have little knowledge of and no access to their final consumers.

Lack of Assets and Credit taking ability

Extreme poverty, lack of assets and inability to access or take credit characterize the home workers situation. In India much of the labour involved in the agarbatti industry in Bangalore is from migrant families with no local standing. In Bangladesh too survey results point to the fact that the majority of homemaker families are migrants from rural areas and 80% have no land resources. 32% of the surveyed families were below the poverty line with family incomes of less than Tk. 2000 per month. Similarly survey findings for football stitchers families in Pakistan showed that mean household income was Rs. 2,927 and that 68% of the families were landless and 83% reported being under debt. The study for Sri Lanka also showed that only 23.5% of women coir workers had their own pits. As per survey results of 500 respondents 51% cited inability to repay as the primary reason for not taking loans while another 10% cited the lack of collateral as the principle constraint.

Lack of legal cover

With the exception of India where some gains have been made in terms of ensuring minimum wages to workers in the unorganized sector and in setting a precedent by offering social security coverage to home workers in the bidi and cigar industry (even here implementation is an issue), the legal situation of homeworkers in all other countries remains very bleak.

Lack of awareness of rights /organization/ unionization

Women's groups, NGOs and agencies involved in organizing home based workers and advocating their cause are in a nascent stage in most of the countries in South Asia. Even in India where SEWA has spearheaded a very successful movement and waged successful struggles for workers in key sectors, given the spread of the country and the large number of sectors and workers involved a daunting distance remains to be traversed.

Some advantages:

The foregoing analysis, while largely true, misrepresents the situation to the extent that it implies that all women are bound to the homework situation by the *lack of viable choices*. For many women homework constitutes the employment of *first choice* due to certain advantages it offers. It is important to highlight these, without minimizing the travails of the homeworker, so that while redressing the problems of the sector it does not happen that features valued by the workers are lost in the move towards greater regulation of the sector.

Enable the combination of multiple roles

For a significant number of women workers their maternal and domestic responsibilities remain the first priority for their time and attention and wage employment at home is part of a strategy to better discharge these responsibilities. Employment within the home is desirable because it enables a combination of the multiple roles of mother, homemaker and income provider and to replace it with employment outside the house would constitute an inferior option for such workers. In Pakistan, in the wake of international protest against child labour, some manufacturers have set up model sex segregated factories for women workers with to and fro transportation facilities. Even so recruitment rates have been low and women's participation in the football industry seems to be on the decline. In the bid to regulate child labour women's employment may have become a casualty.

Ease of entry and re-entry

A study of garment workers in Bangladesh showed that the majority of formal sector garment workers were unmarried young women while that of agarbatti workers in India showed that women above forty constitute the majority of workers in the factory sector. Homework seems the domain of women in the 20-40 age group as entry and re-entry after a break are in the control of the worker. Women typically join at an early age as helpers to their mothers or other family members, work for a few years before marriage, discontinue work for 2-5 years in the early stages of marriage, resume it again normally under pressure to make ends meet and continue to do so till their health permits or younger family members take over.

Better, more flexible working conditions

Findings from at least three of the sector reviews point to the fact that homeworkers may be better placed compared to their counterparts in factories in relation to conditions of work:

- Agarbattis are rolled on the pavements and lanes around homes in urban slums. Even so, homebased workers have a more conducive work environment than their factory counterparts who sit in rows of workbenches in dingy, ill-lit, sooty surroundings. Thus homebased rollers are able to match in four hours the productivity achieved by factory workers in eight hours due to the congeniality of the work environment and the flexibility in their schedule allowing them to vary tasks.
- Embroidery workers: A majority of workers put in 4-6 hours of work in a day. Their conditions of work are quite pleasant with a group of 4-8 women sitting together in a common compound or under a tree. Children are simultaneously minded by the mothers. This contrasts favorably to conditions for factory workers who are subjected to long hours, compulsory overtime, inadequate lunch and toilet breaks, very little leave and badly ventilated working environments with poor toilet facilities.
- Football industry: While the working environment in workshops was found to be dreary and poor lighting could possibly strain eyes, in the home setting workers usually worked in open courtyards or in the shade of trees outside their homes. Consequently they did not look as fatigued or bored as their counterparts in the workshops.

The evils of occupational health problems and sexual harassment at work are also somewhat contained in the homework situation. The seriousness of health hazards depends on the hours spent stitching, the extent of breaks taken and the conditions (e.g. degree of light and ventilation) of work. In the home situation these risks are reduced: women and children rarely work for hours without breaks but fit piece rate work around other household activities such as feeding animals, cooking, fetching water and fodder, taking care of younger children and recreation.

These observations should not be taken to imply that all is well with the working conditions of homeworkers. Studies by SEWA, Aurat Foundation and others point out that living quarters of these workers are modest and given that these accommodate families of 6-10 members, their use as work space encroaches on precious living space for the family. The need for loans and assistance to expand and improve their houses is a high priority for home based workers.

The Way Ahead

Given their extremely disadvantaged current status policy makers, governments and representatives of homeworkers need to adopt a comprehensive strategy to make a dent in solving the problems of this sector. A three pronged approach is suggested here: administrative measures covering those things which can be accomplished with the current laws through extending the reach, expanding the scope or making more effective the implementation of existing projects, schemes and programmes of governments; organization and empowerment of workers into an effective bargaining position and pressure group vis a vis employers and legislation to bring these

Table 1: Addressing problems of home based workers: matrix of policy options

Problem/ Approach	Administrative/ Governance	Organization/ Empowerment	Legislation
Occupational discrimination	• Greater educational opportunities	• Awareness for among	raising women

	women.	workers of their rights	
	<ul style="list-style-type: none"> Easily accessible, relevant and affordable skills development training Better access to credit facilities 		
Wage discrimination	<ul style="list-style-type: none"> Effective implementation of equal wage laws where they exist 	<ul style="list-style-type: none"> Awareness raising among women workers of their rights 	Promulgation of equal wage laws
Low wages	<ul style="list-style-type: none"> Effective implementation of existing minimum wage laws 	<ul style="list-style-type: none"> Collective bargaining Cooperative formation 	<ul style="list-style-type: none"> Extending minimum wage legislation on the lines of legislation for bidi workers in India, to other key informal sector work e.g. garments, agarbatti, coir
Insecurity of Payment		<ul style="list-style-type: none"> Collective action and protest by workers 	<ul style="list-style-type: none"> Make registration by individuals/ concerns hiring homeworkers mandatory as also maintenance of records of workers by them Extending the coverage of laws relating to payment of wages to include home based piece rate workers
Insecure availability work	<ul style="list-style-type: none"> Skill upgradation Increased self employment opportunities 	<ul style="list-style-type: none"> Cooperative formation 	
Unmet social security needs	<ul style="list-style-type: none"> Design and implement innovative social security schemes for informal sector workers e.g. on the lines of the insurance scheme introduced by SEWA 		<ul style="list-style-type: none"> Coverage of key sectors in each country by legislation on the lines of the Bidi Workers Act and Cess and Welfare Fund Act.
Invisibility of women's work	<ul style="list-style-type: none"> Include in national census Special sector specific enumeration projects Empower women's groups and reputed NGOs to identify and register homebased workers and give them identity cards 	<ul style="list-style-type: none"> Lobbying and awareness raising in national and international fora Networking of homeworkers organization 	<ul style="list-style-type: none"> Make registration and maintenance of records by employers of homeworkers mandatory.

Child labour in the home	<ul style="list-style-type: none"> • Improve access to good quality, relevant, education • Well targeted programmes aimed at providing working children opportunities for recreation, learning and self development e.g. as done by Sudhaar in Lahore, ADITHI in Bihar • Provision of crèche and child care facilities to enable those workers who choose to work outside the home, to do so. 	<ul style="list-style-type: none"> • Negotiating for higher wages to make need for child involvement redundant
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workers within the purview of national labour laws. Table 1 contains a policy matrix detailing how the problems of the sector can be addressed using a combination of these approaches. The three main elements of strategy are also discussed separately below:

- Better governance and delivery of existing programmes of governments can go a long way towards improving the lot of home workers. This would include among other things, improving the access of women to education and to appropriate vocational and skill development training; improving the access to credit facilities; better access to child care and good quality education for children of these workers; better implementation of minimum wage and equal wages for equal work legislation where it exists; more effective design and administration of national census surveys to net in home based workers and their contribution; special drives to enumerate, identify and register workers in select industries with a high concentration of home workers.
- Labour reforms world wide have historically been achieved through workers' struggles and representation to industry and government. The impetus for reform in this sector also must come necessarily from workers themselves and this can only be achieved by organization and empowerment of home workers as a collective force. Awareness raising among women workers of their rights and role; lobbying with policy makers and industry; collective bargaining and wage negotiation; forming workers cooperatives to provide alternate marketing channels; and networking and building solidarity among different constituents of the home working industry are all essential elements of strategy. Governments can play a supportive role in this arena by giving recognition to agencies advocating home workers' causes and by giving legal status to trade union activity for this segment of the economy.
- Efforts to organize home workers and to obtain better access to existing services and programmes can only succeed in reaching a limited number of the whole population of such workers. Provision of legislative cover is the only measure which can extend to all workers, though their ability to access it will be constrained in the absence of the first two elements of strategy. A multi pronged, flexible approach to achieving legal protection for

home workers is recommended. While in the long run a comprehensive bill covering all homeworkers may be targeted for, this cannot be an immediate reality in all of the countries under discussion. In the interim identification of key industries with a concentration of home workers and promulgation of legislation on the lines of the bidi industry in India can be a significant step. This legislation levies a compulsory cess on these industries to create a fund which administers social security benefits. Minimum wage protection is also afforded. An another important step would be making mandatory the registration of homeworkers by employers and extending the coverage of existing laws relating to timely payment of wages, bonuses, provident fund etc. to home workers who have long standing contractual relationships with a single employer.

In summation, simultaneously and consistently pursued these approaches have the potential to mitigate the conditions of homeworkers and provide to them fair, decent and gainful conditions of work. The most pressing needs at this juncture seem to be of political will and commitment from policy makers to address the concerns of this large but hitherto neglected constituency.