THE YOUNG WOMEN FROM
RURAL VILLAGES POWERING
AN URBAN INDUSTRY:

A BASELINE SURVEY OF

YANGON'S GARMENT SECTOR WORKFORCE

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EXECUTIVE SUMMARY

In May 2017, C&A Foundation commissioned Enlightened Myanmar Research Foundation and Andaman Research & Advisory to undertake a study of the garment sector workforce. C&A Foundation and its partners recognized there was a lack of a strong quantitative evidence on the demographics and economic standing of garment sector workers. This executive summary provides highlights and key findings from the full report, which seeks to provide a first step towards understanding who Myanmar garment workers are, their lives, and how organizations can work to empower them.

THE STORY OF A PROTOTYPICAL MYANMAR GARMENT WORKER:

The prototypical Yangon garment sector worker is a young woman between the ages of 19 and 21, who has migrated to Yagon within the last two years. She is ethnically Bamar, speaks Burmese as her first language, and can read and write at a basic level having completed grade five. She is from Ayeyarwaddy Region, though many of her friends are from Bago and Rakhine. She is unmarried and lives with several friends/colleagues and one other family member, her older cousin.

This worker is employed by a foreign-owned factory as a sewer. She joined the factory because it offered a decent regular salary for work that was neither physically demanding nor an unpleasant place to spend her days. Her workweek is six days, with her only day off on Sundays. She has been working in this factory for almost one year and if she were to quit, it would be to find a factory with better base pay. She has an ID card but no letter confirming her position and no copy of her contract.

DEMOGRAPHICS OF THE YANGON GARMENT WORKFORCE:

- The workforce is over whelmingly female: 94% of respondents were women.
- Workers are young, with a clear majority between the ages of 16 and 23.
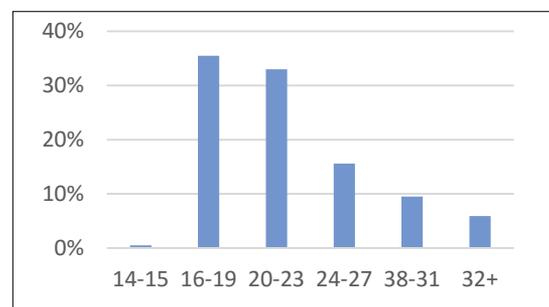
- Most workers are Bamar and are migrants to Yangon, often from Ayeyarwaddy, Magway, or Bago Regions. The largest ethnic minority group of workers are Rakhine (19%).
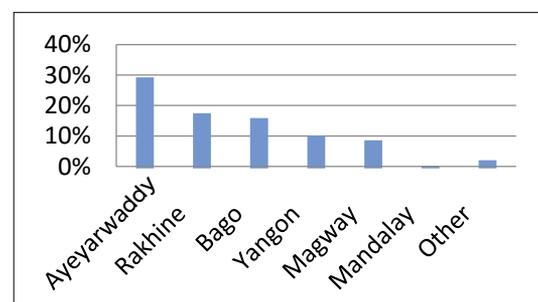
Though she thinks she has a good job and sees garment work as better than most of her other options, life in the factory is not without its challenges. These include the limited breaks, and frequent scolding from her seniors and line supervisors. She feels that this occasionally reaches verbal abuse; she has not experienced any physical or sexual violence. She is concerned that there is no complaint mechanism if she was the victim of more serious abuse.

She got her job through a friend from the same village who had migrated a year earlier and, now that she has her own network, would plan to find a future job through her Yangon friends. For her, the base pay is the most important aspect of a possible new job, though having good managers is also important. It is easy to get a job and if she can demonstrate her ability in the skills test, she will be rapidly employed at any factory. However, for now, she is happy with her current job and is not seeking to leave.

She has heard of unions and thinks that they represent workers in negotiations with management, but does not know much more than that about them. There are none in her factory, and she has only heard some of the more senior employees talking about them. She is not a union member and isn't sure she wants to join because of the limited free time she has outside of work. Nevertheless, she votes, along with the rest of her line, for in-factory representatives who negotiate with ownership on any problems the workers may have.

OCCUPATION FINDINGS:

- Length of service varies, 25% of workers have spent less than 6 months at their current factories and almost half over 1 year.

- For over 50%, their current job is their first garment sector position.

- Half (50%) got their job through a friend and even more (60%) thought their network of friends was the best way to find a new job.

- Base pay is the most important chracteristic of any new job (67%)

- There is a split between those who want to leave the sector and those who like their current job.
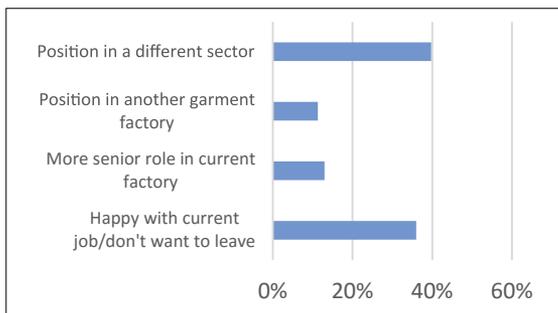
ORGANIZED LABOUR FINDINGS:

- Of the slight majority of workers who had heard about labor unions (54%), understanding remained low, with 56% of them saying they did not know what a union's purpose was.

- 35% of workers who had heard about unions reported there were unions in their factory and most had heard about them from co-workers or senior employees (81% combined)

- However, union membership is extremely low: just 15% of those who had access to unions were members, or just 22 out of a 778 person survey (3% of the whole sample).

- Perceptions of unions were also mixed, with only 42% of those who had heard of unions but were not members expressing an interest in joining one. Qualitative findings suggested workers viewed union activities as taking up their limited free time for an unclear results.

Her salary is paid monthly, at the beginning of each month and consists of her base salary plus overtime and any bonuses she may be eligible for. Workers can get bonuses for attendance, punctuality, and skills. While the envelope of cash that she receives comes with a pay slip explaining how it was calculated, it is confusing and frequently she does not fully understand all the parts of her salary. Over the last six months her base salary has not changed, and only one or two of her friends have seen theirs go up.

She almost always works overtime and though she does have the right to say no, she worries that if she refuses too often it will compromise her relationship with her supervisor (and consequently her monthly bonuses) or even lead to her being fired. Also, because her base salary is so low, she wants to work overtime; it is an important contributor to her salary as she normally gets between MMK 25,000 and MMK 50,000 in overtime pay alone. Her bonuses are more variable and smaller amounts; she rarely makes more than MMK 25,000 each month in bonuses.

As she lives away from her parents and extended family, she makes her own financial decisions. Her first priority is paying for her housing, which accounts for a large proportion of her income, and she pays between MMK 30,000 and MMK 60,000 each month, and it has increased recently. Most months, once she accounts for housing, food, and other necessary expenses, the money that remains is sent back to her family.

Occasionally she is able to save some for herself (and when she does she stores cash by hiding it or giving it to her landlord for safekeeping), but this is rare. As the money she remits every month is very important to her family, that is prioritised. Her friends who are a little older tend to save more and she hopes to be able to copy them in the coming years. While her salary is never high enough and she often has to take out small loans from senior colleagues or friends toward the end of the month, she does not have any substantial debts that she has to pay interest on.

PERSONAL FINANCES:

- All workers rely heavily on overtime, (over 90% had overtime pay every month) and feel pressured to accept overtime work, either indirectly or formally from managers. But it is important to their salary: over 75% received more than MMK 25,000 per month.

- Workers are generally financially independent; 60% make their own financial decisions.

- How respondents made financial decisions and what they spent varied by township, likely a reflection of different demographic (age and region of origin) trends.

- While 31% of workers are able to save some money each month, generally by storing cash (62% of savers), 61% remit money to their family. There was also significant township variation for savings and remittances.

- Workers in the middle age brackets (24-27) are the most common to report saving money most months, while younger workers show the highest remittance rates.

- Interest-based debt was held by 34% of respondents, with notable township differences. In qualitative descriptions of debt, workers did not consider short-term loans from friends and co-workers that did not accrue interest to be part of their debt burden.

Finally, she owns a smartphone, one that she bought herself after seeing all her new Yangon friends using theirs. She also wanted to be able to easily speak to her family on a regular basis. Each month she spends about MMK 5,000 on credit, divided between the two SIM cards she has — one from Telenor and one from MPT. She uses MPT to check Facebook as it has a free mode on their network, while Telenor's special offers allow her to call her parents (also Telenor users) without using too much credit. All her friends use either Telenor or MPT and a lot of them also have two SIM cards.

Because she cannot afford to spend more on credit, she is very concerned about the cost of 3G and only turns it on occasionally to download messages from Viber or Facebook updates. Generally, she has 3G on for about an hour. Her and most of her friends have Facebook accounts and everyone with a smartphone has Viber; all the apps on her phone were pre-loaded by the phone store but she does not tend to use other ones. As her factory prohibits phone use, except at lunch breaks, she only uses it in the evening. Most of her time spent on her phone is calling her parents and friends back home, chatting on social media, or watching movies and listening to music shared by co-workers.

MOBILE CONNECTIVITY:

- A large majority, 83%, of workers own a smart phone.

- Most workers spend less than MMK 10,000 per month, but this is a measurable proportion of their income. Half spend less than MMK 5,000.
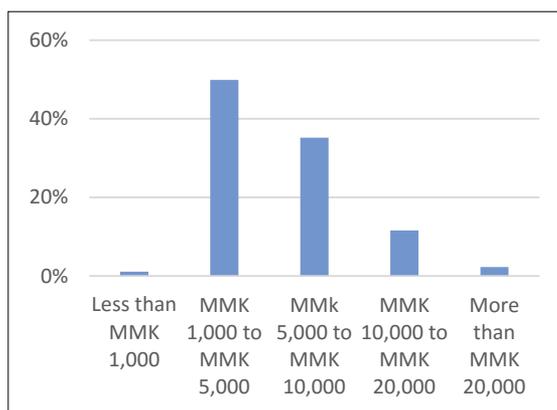
- Workers are concerned about 3G usage: 53% turn it on less than 1 hour per day and 12% never use it.

- A majority of workers have Viber (91%) and Facebook (77%), with most using few other apps.

A NOTE ON METHODS:

For this survey 778 workers were interviewed across two townships in Yangon, Hlaingtharya and Shwepyitha. The sample is representative at the township level.

As there was no pre-existing sampling frame, a modified approach was used where wards and neighborhoods with high densities of workers were identified. Following this, field teams used transect walks based on worker hostels to identify respondents.

A team of 20 conducted the research over the course of two months, interviewing only on Sundays—most garment workers one day off.

A series of FGDs were also held with subsection of respondents to add explanatory depth. A total of 13 FGDs were conducted across the two townships.

CHAPTER 1:

INTRODUCTION

The Myanmar garment sector in 2017 is experiencing an inflection moment. Driven by the lifting of economic sanctions in 2011 and 2012, growth has been rapid as regional buyers have expanded their operations and Western brands have returned to Myanmar. A relatively low minimum wage (introduced in 2015) and the major internal urban migration flows have given the garment sector access to the large and inexpensive workforce it needs. These changes have occured as wages in some regional garment hubs, notably Vietnam, have become increasingly expensive and other hubs, such as Bangladesh, present other challenges, including safety and security problems. Despite other ongoing issues facing Yangon, particularly surrounding infrastructure, the sector is expected to continue to expand rapidly, with industry estimates suggesting that it could employ over 1.5 million people by 2020, compared to just 111,000 in 2012.

This growth will be accompanied by the same challenges that workers also face elsewhere in the region: low pay, long hours, challenging and sometimes unsafe working environments have all been reported in several qualitative research reports released in the last 18 months. Unions, labour activists, local civil society groups, international NGOs, and private foundations are now working to ensure the sector's growth rewards workers rather than coming at their expense. This work will be ongoing for years if not decades and will depend on a thorough, and frequently updated, understanding of not just the systemic challenges facing the garment sector workforce, but also who the workers are, their lives, and how they can be empowered by groups seeking to help. The research presented in this report is a first step towards that understanding.

RESEARCH BACKGROUND
In May 2017, C&A Foundation commissioned Enlightened Myanmar Research Foundation (EMReF) and Andaman Research & Advisory (ARA) to undertake a mixed methods study of the garment sector workforce. C&A Foundation and its partners recognised the lack of a strong quantitative evidence base, on which actors seeking to improve the lives and working conditions of garment sector workers could rely on when designing interventions. While there is an increasingly wide array of qualitative reports on the various aspects of the garment sector, more numerical data was needed. As a result, a survey was selected as the primary tool, with a series of focus group discussions added to 'mix' the methods, providing the project with the ability check quantitative findings and probe somewhat further into the rationales behind certain answers provided by the survey.

RESEARCH OBJECTIVES
The project sought to answer four overarching research questions.

1. What are the characteristics of the garment sector workforce, particularly demographics, languages spoken, level of education, and experience?

2. What is the work and labour context for the garment sector workforce, namely how do they engage with management, what challenges do they face, what is their level of engagement and understanding of unions or other labour representation?

3. What is the economic situation facing garment sector workers? How is their salary calculated and what financial decisions do they make about savings, remittances, and debt?

4. How do garment sector workers engage with mobile technology, with a particular view to Myanmar's unique smartphone boom and its role in expanding connectivity?

RESEARCH TEAM AND PROCESS

The research was undertaken by a joint team from ARA and EMReF. ARA led the design of the research, developing the survey tools and focus group discussion guides along with the sampling methodology and a full methods brief is provided in the next chapter. A participatory training week was held with the EMReF field research team of 21 researchers (including four team leaders and one research manager). All field research was then conducted by the EMReF team, who also consolidated the data (both qualitative and quantitative), providing translation support where necessary. Qualitative data (i.e. translated field notes) were analysed by the ARA team amid consultation with EMReF while the EMReF quantitative analysis team worked in partnership with ARA to parse the dataset and develop a coherent narrative. Finally, ARA drafted the report, which was finalised following review from all partners.

GARMENT SECTOR OVERVIEW

The focus of this report does not include the historic trajectory of Myanmar's garment sector or the sector's current size or growth patterns as both subjects have been well-captured in dedicated research. For the sector's history, Toshiro Kudo's work offers a strong analysis; and on the industry's current standing, Impactt Limited's "From Boycott to Boom" is particularly useful. Additional contextual analysis is provided by the work of various civil society and activist organizations, in particular Progressive Voice's 2016 report "Raising the Bottom, a report on the garment sector in Myanmar." All such references are listed in Annex A. Nonetheless, a short overview of the sector is useful to set the context for this study's findings.

In brief, Myanmar's garment sector is not a new phenomenon, and prior to the imposition of the July 2003 Western sanctions, growth was at a rapid pace and employment was over 300,000 workers. Within a year, however, more than a hundred factories closed and at least 50,000 jobs were lost. The sector's growth reversed and, along with almost all manufacturing sectors in Myanmar, stagnated for nearly a decade.[1]

Since the reform period began in 2011/2012, the garment sector has appeared to grow rapidly, although strong sector data remains a key challenge to analysing the industry. However, figures from the Impactt report indicates that employment in the garment industry has more than doubled from 2012 to 2016 (from 111,000 to over 250,000), while the value of garment exports has increased from USD 912 million to USD 1.46 billion from 2012 to 2015. The Myanmar Garment Manufacturers Association (MGMA) has projected strong growth for the industry and estimates that by 2020 the sector could employ 1.5 million people and generate between eight and ten billion dollars in exports. According to 2015 ILO estimates, the garment sector accounted for 16% of all manufacturing activities (although this also includes the informal garment sector).[2]

After many years of being almost entirely dependent on Asian markets, the EU has rapidly become Myanmar's primary market overtaking Japan in 2015 and solidifying its position in 2016. 45% of all Myanmar's garment exports in 2016 were sold to the EU, or approximately $950 million. Japan stands in second place at 31% (or $647 million) and Korea in third (16%).

As Myanmar's largest city and economic centre, Yangon is host to the majority of the country's garment factories. According to MGMA there are over 200 factories in Yangon, with a mix of

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[1] Kudo, Toshiro. the Impact of United States Sanctions On the Myanmar Garment Industry 2005

[2] International Labor Organization. Asia-Pacific Garment and Footwear Sector Research Note, Issue 6, November 2016

high-quality and high-volume enterprises focusing on export, and low-quality and low-volume focusing on the domestic market. Many, especially the export-focused factories, are located in the industrial zones that dot the city's northern and western townships, however, there is also increasing interest in the Special Economic Zone at Thilawa given its improved port access and industrial facilities. The townships selected for this study reflects this geography: Hlaingtharya has long been one of Yangon's largest manufacturing townships and there are a large number of factories from various sectors clustered along Shwepyitha's southern border.

CHAPTER 2:
METHODOLOGY

This study utilised a mixed methods approach with a particular emphasis on the quantitative component given the overarching research objective of providing a numerical baseline for the demographics, working lives, economic conditions, and engagement with technology of the garment sector workforce. The specific methodology is outlined in this chapter and was the result of an iterative process that involved internal discussions within Andaman Research & Advisory and EMReF leadership as well as critical feedback from C&A Foundation country team and M&E management. Discussions with survey team leaders helped identify key opportunities and constraints, particularly with regard to how best to identify quantitative survey respondents and arrange focus group discussions.

THE QUANTITATIVE SURVEY

This survey's goal was to provide a baseline understanding of the characteristics of the garment sector labour force in and around Yangon. It sought to gain this understanding by directly engaging garment sector workers and asking them a series of questions about their identity, economic existence, relationships with employers and organised labour, and engagement with technology. Particularly given the questions surrounding their relationship with employers and unions, it was vital that the survey participants felt they could answer confidently without pressure from either managers/ownership or labour activists. As a result, this survey implemented a more challenging sampling procedure than one that would go through factories, brands, or labour groups.

The development of the methodology was, therefore, constrained by the fact that there is no complete sampling frame for the garment sector labour force, i.e. there is no 'list' of all workers from which to identify respondents through a standard sampling approach. As a result, an alternative to 'simple' or 'systemized' random sampling had to be developed. While in rural areas such tools as transect walks, interval sampling, and the 'pencil spin' approach can be substituted, they are not suitable for densely populated urban areas.

The sample was stratified by gender and is representative (at a 95% confidence level, 5% margin of error) for female garment sector workers in each township. Male workers were included, but given their small presence in the industry, the study did not attempt to gain a representative sample. Data on other key demographic indicators, including age, place of origin, and experience in the garment sector, was also collected and analysed (see Chapter 3 on demographic findings) but was not determinative of the sample. A copy of the survey is found in Annex B.

THE SAMPLING PROCESS

The sampling approach used workers' residences (most frequently worker hostels) to develop an evolving sampling frame and identify respondents.

This sampling process was developed in an effort to address two opposing forces effecting on the research. The first was a desire to be able to claim a level of representation that requires a systematic approach to achieve an intra-township cross-section of workers. Based on analysis of the results, specifically the demographics, the selected methodology appears to have achieved this. The second force was the very real challenge of identifying garment sector workers in a context where there are few unifying factors from which to develop a sample apart from their work. Any overly complex field procedure risked being underutilized or incorrectly implemented.

By using local contextual knowledge to access respondents in their homes, which introduced an admitted level of purposive sampling, the sampling process sought to find an effective middle ground.

Ward Selection

Following the determination that the survey would be conducted in Hlaingtharya and Shwepyitha townships given their relative density of garment sector workers, the next step was to identify the particular wards where the research was to take place. This was done in coordination with the team leaders and in consultation with other researchers who had extensive experience working in these communities.

A list of first-choice wards was developed with additional backups. A degree of flexibility was also included to allow the research manager and team leaders to follow 'leads' if new wards or neighbourhoods appeared to be more appropriate based on field experiences. The wards were selected based on a priori understanding of garment sector worker density with the goal of achieving geographic representation from both communities living near the factory zones and those living further away.

Enumeration Practices

Once the target wards were identified, several days of training were held with the survey team and the field work began. Field research was conducted in two phases: Hlaingtharya was conducted over three weeks from 11th of June to 25th of June 2017, and Shwepyitha followed from 2nd of July to 23th of July 2017. Prior to each phase the research team leaders and research manager spent a day in the township introducing the research to the township and ward leaders, and identifying neighbourhoods (wards) with higher densities of garment sector workers.

The survey process was conducted only on Sundays with the exception of one Saturday that was a national holiday so workers were not at the factories. Hostels were identified based on transect walks across areas identified by team leaders. Once a hostel was identified as having a large number of garment sector workers in residence, the teams would enter and ask individuals if they worked in the garment industry and if they were willing to be surveyed.

While an effort to randomize even at this level was made (such as not interviewing everyone if they were from the same factory, or not interviewing roommates), a priority was placed on achieving strong responses from a cross-section of garment sector workers rather than on complete randomization. This was due to practical and time constraint issues (i.e. restricted to one day per week).

Additionally, there was no attempt to ask ward and township leaders to organise or attend to the team as they completed the field work. In several cases, local leaders did attempt to accompany the team; and for the most part the team leader was able to politely explain the importance of independence. In some cases, however, it was necessary to identify a new ward. These issues are detailed in the section below.

ETHICS & DO NO HARM:

Throughout the field research there were strong do-no-harm and protection safeguards. Wherever possible workers were interviewed outside of the public eye and were always given an option to find a more private space even it was a challenge. Training to this effect was included in the preliminary stages of the project. Enumerators were also trained in research ethics with emphasis on the importance of receiving informed consent and explaining to respondents the survey's anonymous nature. Training was also provided on the importance of transparency, respect for

respondents, and field team safety.

THE SAMPLE:

778 surveys were collected, split evenly between the two townships (389 per township). The distribution of the sample across wards is shown in Table 1. It should be noted that Ward 1 in Shwepyitha is extremely large and stretches along the entire border with the industrial zone area; two field teams were assigned to different parts of this ward.

Table 1: Survey Locations

Township	Hlaingtharya					
Location	Ward 5	Ward 9	Ward 11	Ward 13	Ward 20	Yay Oak Kan Area
Interviews (#)	14	97	97	97	9	75
Interviews (%)	1.8%	12.5%	12.5%	12.5%	1.2%	9.6%
Township	Shwepyitha					
Location	Ward 1	Ward 2	Ward 16	Ward 5	Ward 20	Bone Sha Gone Area
Interviews (#)	190	53	16	115	2	13
Interviews (%)	24.4%	6.8%	2.1%	14.8%	0.3%	1.7%

THE SURVEY TEAM:

The team consisted of 16 surveyors, four team leaders, and a research manager, all from EMReF, with additional support provided by EMReF leadership. The survey team completed the data entry and performed initial data cleaning work. The two-person EMReF quantitative analysis team conducted final data cleaning and developed all data tables using SPSS.

THE QUALITATIVE FOCUS GROUP DISCUSSIONS

OVERVIEW

A series of focus group discussions (FGD) were held to provide additional explanatory power to the evidence base of the quantitative survey. On one of the fieldwork days each team leader was responsible for identifying suitable participants for an FGD. Specifically, they were asked to select those survey respondents who seemed interested in the research and had provided thoughtful responses or appeared interested in discussing their working lives further, without biasing the selection towards workers that were particularly hostile toward management. An effort was made to achieve age and experience diversity within each focus group and to ensure that different factories were represented.

A total of 13 FGDs were held across the research period with 71 participants. All participants had previously been survey respondents—a decision taken in part as it meant they already had an understanding of the research's focus areas and could probe further into the substantive issues. They included a mix of ethnic groups, although a supermajority (as in the quantitative sample, see demographics findings chapter 3) were Bamar, which accounted for 57 of the participants. Eight states and regions were represented as were a variety of job types within the sector ranging from sewing (a slight majority) to ironing and folding. Table 2 shows the breakdown of FGD participants by township.

Table 2: Focus Group Discussion Demographics

Township	Number of FGDs	# of participants	Female Participants	Male Participants	Age (Mean)	Age (Mode)
Hlaingtharya	7	5-6	37 (97%)	1 (3%)	23	19
Shwepyitha	6	5-6	29 (88%)	4 (12%)	24	22

The FGDs were planned to last 90 minutes, but frequently ran closer to two hours. They were generally held locally, where the workers lived, and a private space was used where available (one was held in a trucking garage offered to the team as a base of operations by the owner and one other was held in the office of a local workers' association), however when required the FGDs were held in worker hostels themselves.

The question guide for the FGD was developed to follow similar lines as the survey questionnaire. It was developed as a semi-structured question guide and team leaders, who acted as the FGD facilitators, were encouraged to follow interesting lines of questioning even if they did not adhere exactly to the guide. Two junior researchers took notes.

ANALYSIS PROCESS:
In the days following the fieldwork, the joint notes were typed in Burmese and reviewed/edited/ added to by the team leader based on their memory and own notes. These were then translated by the research manager and provided to ARA, which then coded and conducted a thematic analysis to develop township-specific findings briefs. These findings were then included in the report drafting process to highlight the quantitative results, provide contrasting examples, or provide explanations for certain answers.

CHALLENGES AND LIMITATIONS
Although the methodology outlined above was able to mitigate many of the risks identified in the early stages (such as the challenge of researching only one day a week), there were a number of challenges faced by the field teams when completing both the qualitative and quantitative research. Further, a relatively rapid study of this nature faces limitations when it comes to its explanatory power.

CHALLENGES
- Teams faced challenges in engaging with a number of ward-level officials. In some cases, officials were overly involved about the research and sought to direct the research teams to specific sites or keep them away from other areas. In other cases, there was a hesitancy to allow the research to take place and formal permission documents from township- level authorities were requested. In the former cases, the team leaders and research manager were generally able to dissuade assistance, though the teams were occasionally accompanied by a ward representative for the first portion of the research day. In the latter cases, changing the ward was identified as the best option and the new ward's leadership was generally accommodating. There was, however, a lot of reluctance to allow foreigners to participate in the research, which necessarily limited field visits by ARA staff.

- The use of worker hostels as the basis for the sampling frame did risk under sampling non-migrant workers, but was determined to be acceptable. The results suggest that, compared with some other studies, the sample included a lower proportion of workers native to Yangon. However, in exchange they are able to offer greater insight into the challenges facing those who have migrated.

- The qualitative side presented two main challenges. The issue of inexperience among the note-takers, affected the early focus groups in particular. Additional training was conducted by

the team leaders and ARA to ensure that everything that was said, was captured.

■ Second, the breadth of material and the desire of the team leaders to cover all topics meant that the focus groups did not always go as deep as they would have preferred. 90-120 minutes is not much time to cover the broad range of topics included in the question guide, so while participants were never cut off, there was less follow-up on certain question areas.

■ The monsoon presented some logistical difficulties, but these were overcome thanks to the perseverance of the survey team.

LIMITATIONS

■ Absolute randomization was not possible for this study, primarily due to time limitations. If a stricter randomization model had been enforced (combining transect walks with a Kish grid), it is unlikely that each enumerator would have completed more than a handful of surveys per day.

■ The scope of this research means that a number of important issues could not be examined These include:

o A focus on workers in domestically-owned, smaller-scale factories. There are fewer of these factories and they are more scattered, therefore requiring their own approach.

o A focus on the informal garment sector, which accounts, according to the ILO figures, for as much as 70% of all Myanmar garment sector workers (though much of this industry would be outside of Yangon). A dedicated study on the informal sector utilizing a different set of methodologies would be required. ILO defines the informal sector as any firm in the sector that employs less than 10 workers.

■ Thematically, the study was also limited given the primary goal of developing a cross-sector baseline. This meant that no set of issues was examined in great depth, with most specific topics covered in just a handful of questions. These particular limitations included:

o Decision not to collect specific income data because the challenges associated with such collection (high variance, differences in how income is understood, issues of collective vs. individual income, among others) outweighed the benefits, particularly when the opportunity cost (i.e. removing other questions) was included.

o Due to the brevity of the interview sessions, developing a level of trust with respondents for investigating challenging subjects such as abuse in the workplace, which was not necessarily possible. As a result, such issues may be underreported.

o Given the lack of pre-existing survey data, a small number of questions 'missed' when developing answer brackets. As a result, 90% or more responses were in a single category, limiting the ability to provide insight on the differences between workers. These experiences may be used to improve future research.

CHAPTER 3:
DEMOGRAPHIC FINDINGS

The survey's sample size and sampling methodology is representative for the two townships where it was conducted, allowing this demographic analysis to make statistically valid claims. It is, however, important to acknowledge the two methodological decisions (made in the interest of practicality and based on the reality of field work in urban Yangon), that may have impacted who was included. The first is that while a range of wards were sampled in an effort to obtain as broad a picture as was possible, not all wards in each township were included (see Table 1 chapter 2). As detailed in the methodology chapter, wards where previous research indicated a high proportion of garment workers were selected. Due to the nature of migration patterns and tendency of ethnic groups or groups from similar ex-Yangon locations to cluster together, there is a chance some groups could have been under-sampled.[3] Second, the use of worker hostels as the 'hubs' from which to identify workers could likely have biased the sample somewhat towards those types of workers who live in them, e.g., workers who live independently, migrants, and workers without families. However, as the findings presented here tend to correlate with data from other research, these factors do not appear to have create significant distortions.

ADDITIONAL NOTES ON FINDINGS:
Several terms are used throughout the presentation of the survey findings that require clarification. First, there is the term 'senior', which appears frequently in discussions of workers' sources of information: ranging from unions to complaint systems to salary information. The word generally used in Myanmar language is a htet lugyi, translated here as senior, and meaning a respected colleague who is almost always more experienced and generally older than oneself. Second, a number of questions, especially those dealing with finances, were asked in reference to 'normal' time periods, e.g., 'are you able to save in a normal month'. Given the vagaries of garment sector workers' lives, this method was used to simplify responses, and was defined to respondents as 'average' or 'most common' or with more specificity if the respondent asked. For example, in a question on savings it would have been clarified as 'a month without any major one-off expenditures'.

IDENTITY
The gender split in the research sample lends credence to the existing assumption among NGOs and others working on the garment sector that the workforce is primarily female. Of the 778 interviewed, just 45 or 6% were men, with a somewhat greater proportion in Shwepyitha. As a result, while figures presented throughout this study are generally for the sample as a whole, they reflect what is essentially a female sample. Where there are notable gender differences, with 6% of male respondents skewing the answers in different directions, a specific gender analysis is presented, though male responses are clearly indicative rather than statistically significant.

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[3] For more on migration patterns see: The World Bank. A Country on the Move, January 2016

Figure 1: Worker Ages
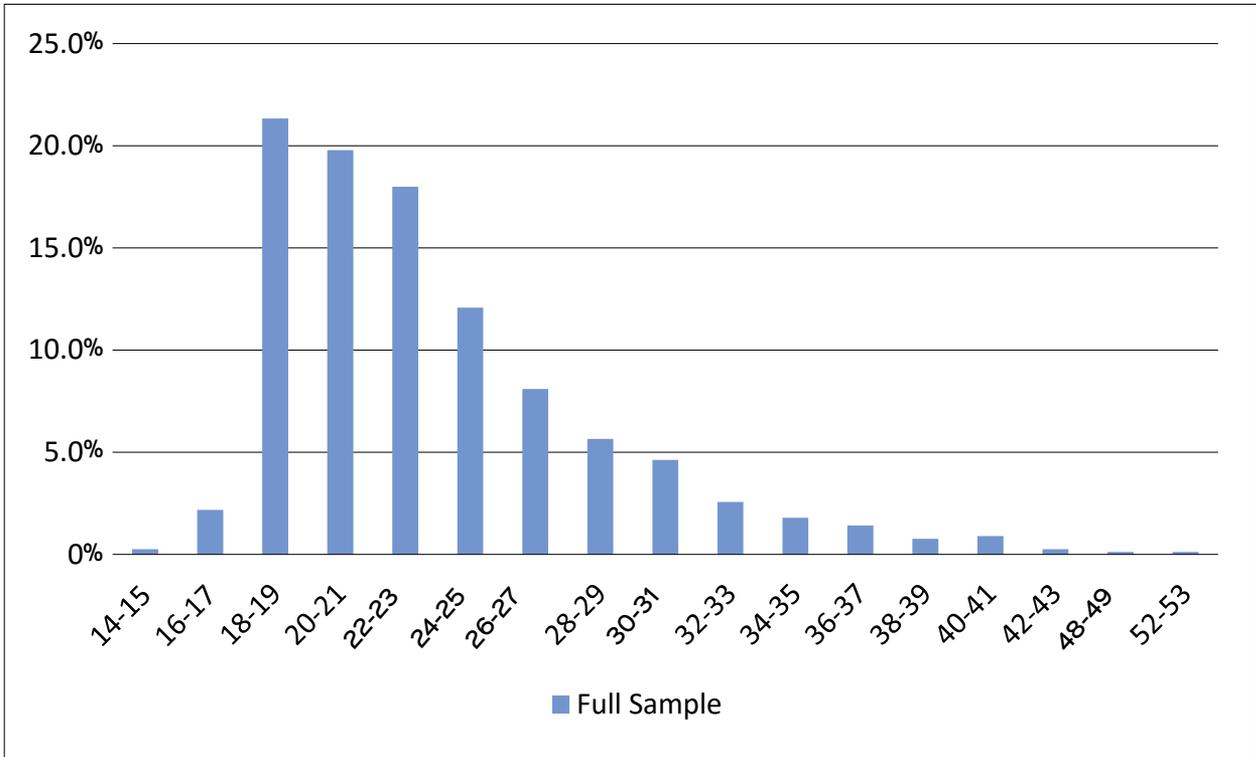
Figure 2: Age Range by Township
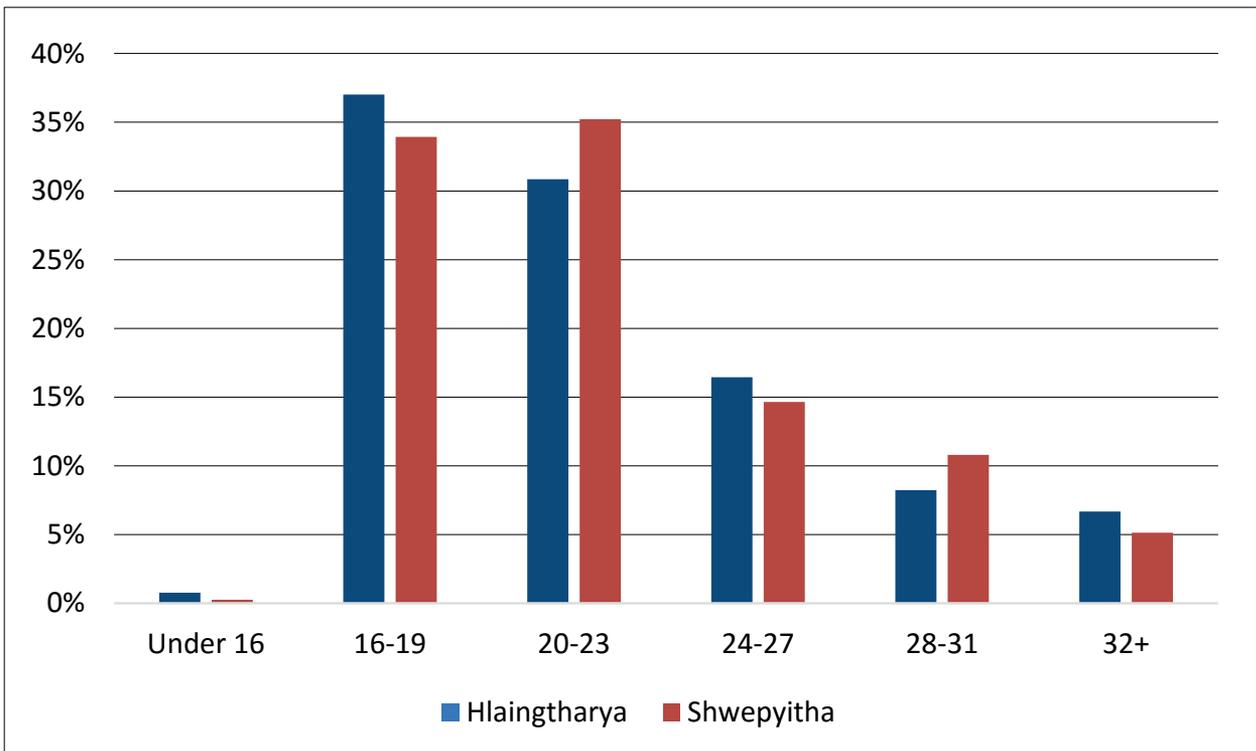
The age of workers across the sample is shown in Figure 1 and broken down by township in Figure 2. It shows that a clear majority of workers are between 18 and 23 (almost 60% of all workers fall within that bracket) and that over 80% are between 16 and 27. There are a tiny number of workers below 16 (just 2 out of the full sample) or even between 16 and 17 (2.2% or 17) reflects that while concerns about age verification remain, the efforts of industry bodies and increasing ties to international buyers with high standards for age enforcement suggest that child labour (i.e. under 16) is relatively uncommon.[4] The presence of older workers (12.6% over 30) also suggests that while the sector is dominated by young women, there are positions held by those with years of experience.

Across both townships, the workforce was predominately ethnically Bamar, accounting for 75% of the sample. The second largest ethnic group was Rakhine (19%), which is unsurprising given the large waves of migration from Rakhine to Yangon found by both qualitative and quantitative studies in the western state.[5] Hlaingtharya was marginally more diverse than Shwepyitha, with small but measurable populations of both Karen (4%) and Chin (1.3%).

Figure 3: Worker Ethnicity
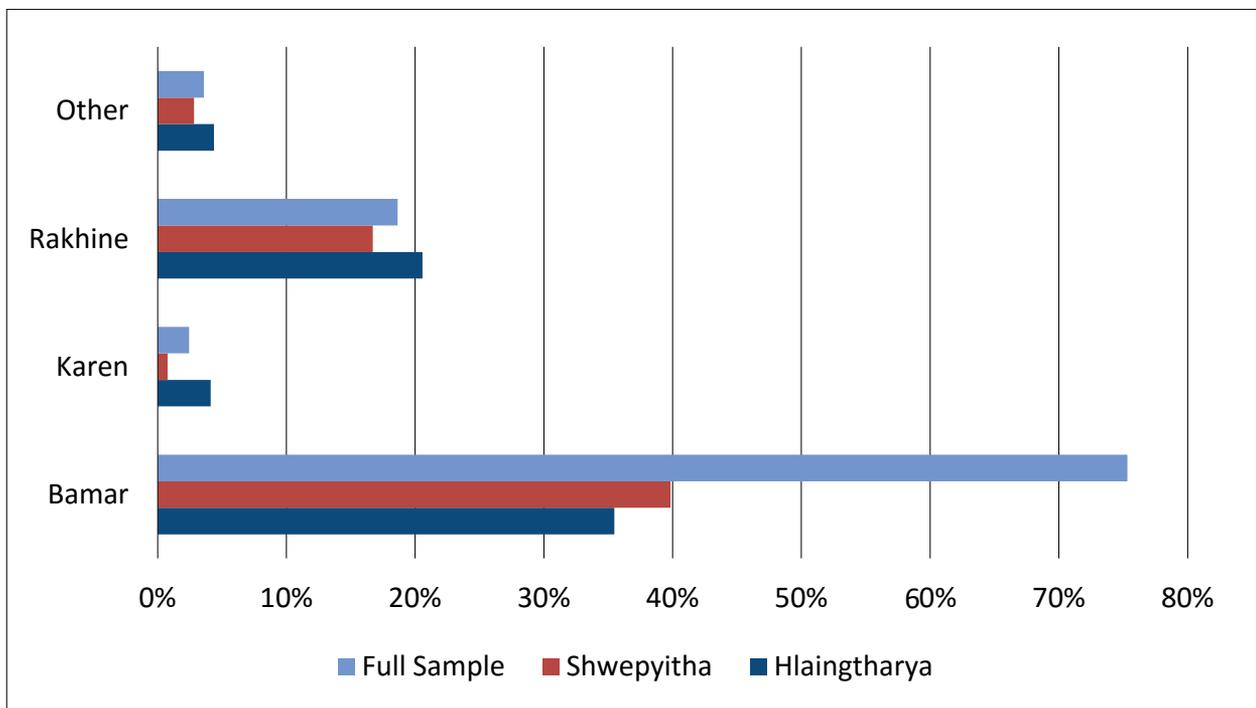
[4] Business for Social Responsibility, Child Labor in Myanmar's Garment Sector 2013

[5] For example: The World Bank. Rural Livelihoods and Social Change in Myanmar: QSEM Round 5, January 2016

Figure 4: Workers' First Language
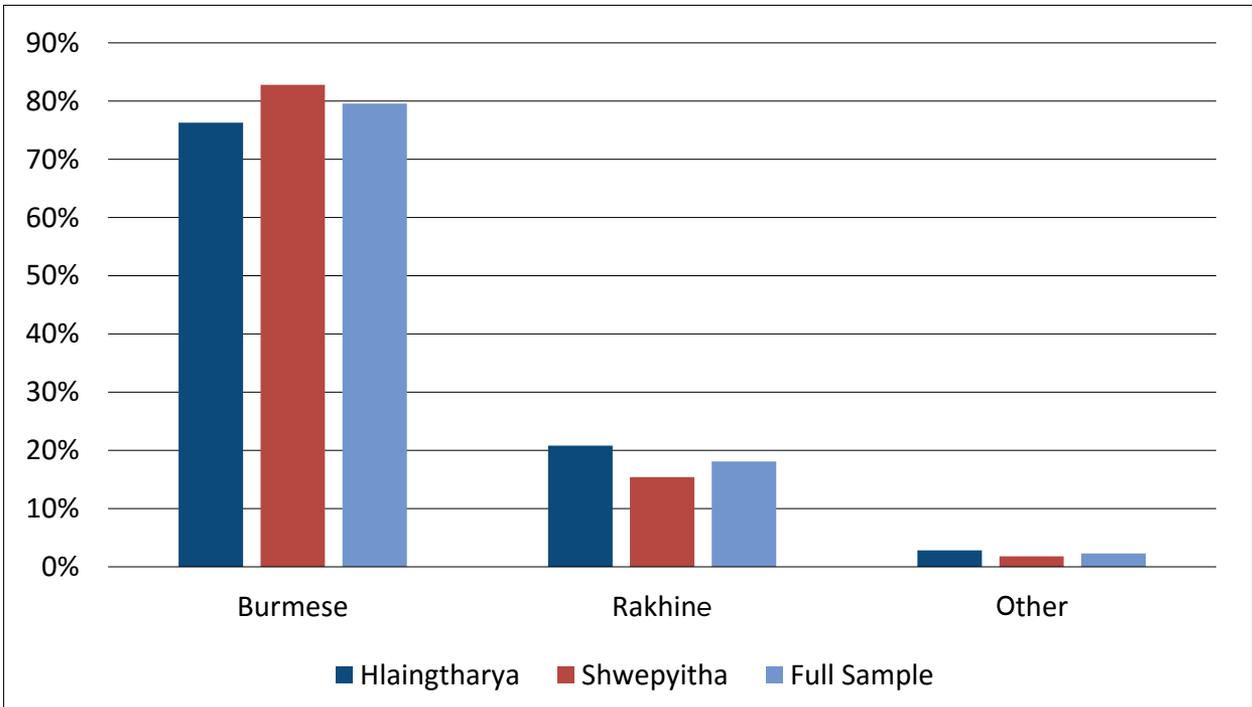
Most workers are native Burmese speakers, with about a fifth reporting that their first language was Rakhine, yet both are simple reflections of the ethnic makeup of the study. Furthermore, the vast majority self-reported as being literate: over 99% reported that they could both read and write in Burmese. Focus group discussions revealed that being able to identify numbers in English script and to read and write basic Burmese is a job requirement at most if not all factories; therefore, these results are unsurprising.

Figure 5: Workers' State or Region of Birth
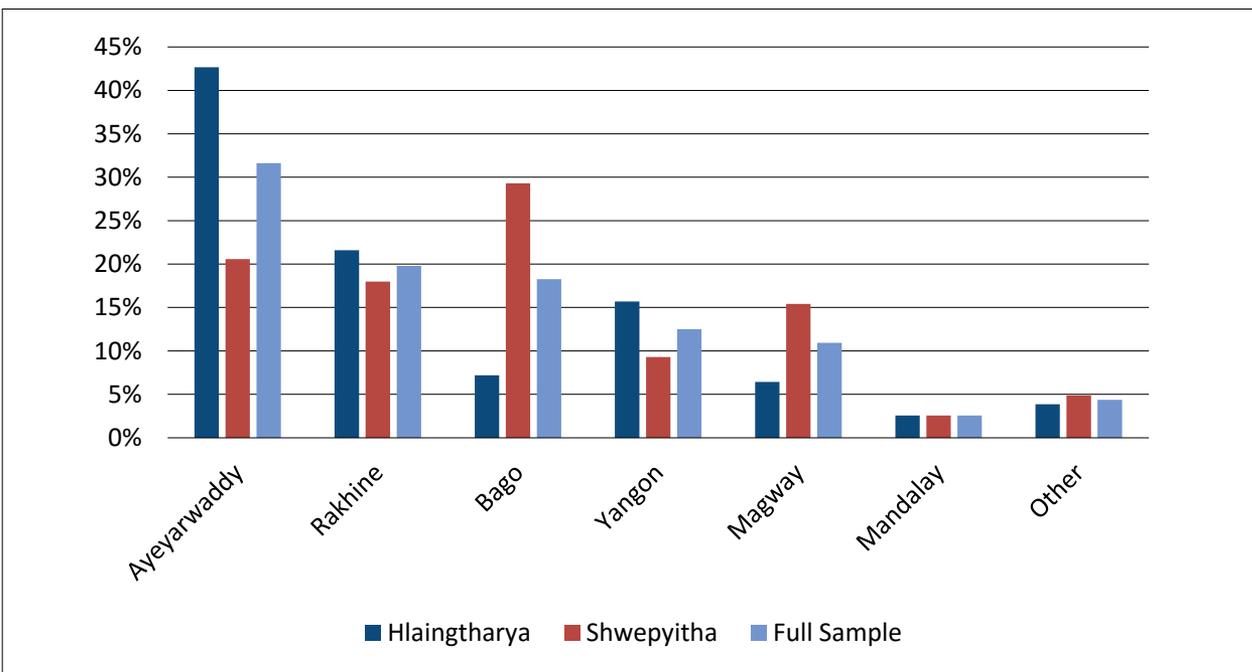
Looking at workers' state and region of birth, Figure 5, provides a more nuanced understanding of where people come from, rather than simple ethnic identity, and it reveals major differences between the two studied townships. A plurality of garment sector workers in Hlaingtharya are from Ayeyarwaddy Region (43%) with sizeable proportions from Rakhine (22%) and Yangon itself (16%). Meanwhile, the Shwepyitha sample is more diverse, with a much higher proportion from the central dry zone regions of Bago (29%) and Magway (15%). 20% are from Ayeyarwaddy, 18% from Rakhine, demonstrating a more even split than other groups, with less than 10% originally from Yangon.

Figure 6: Level of Education
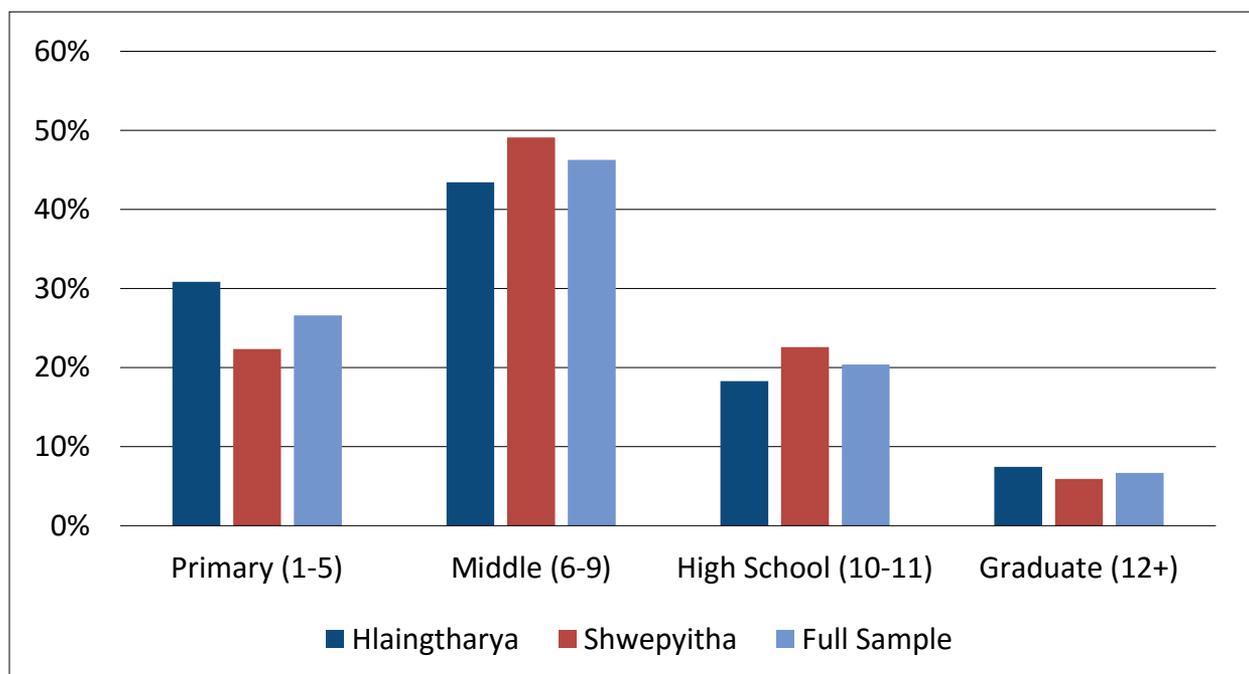
Among garment sector workers, education levels are split but a plurality (46%) is reached in middle school education, which is defined as having completed between six and ten years of schooling. 27% have just a primary education while 7% have graduated high school. Notably, education levels in Hlaingtharya are below Shwepyitha with a higher proportion having only a primary education (31% vs. 22%) and a smaller proportion having completed some high school (18% vs. 23%).

Figure 7: Marital Status
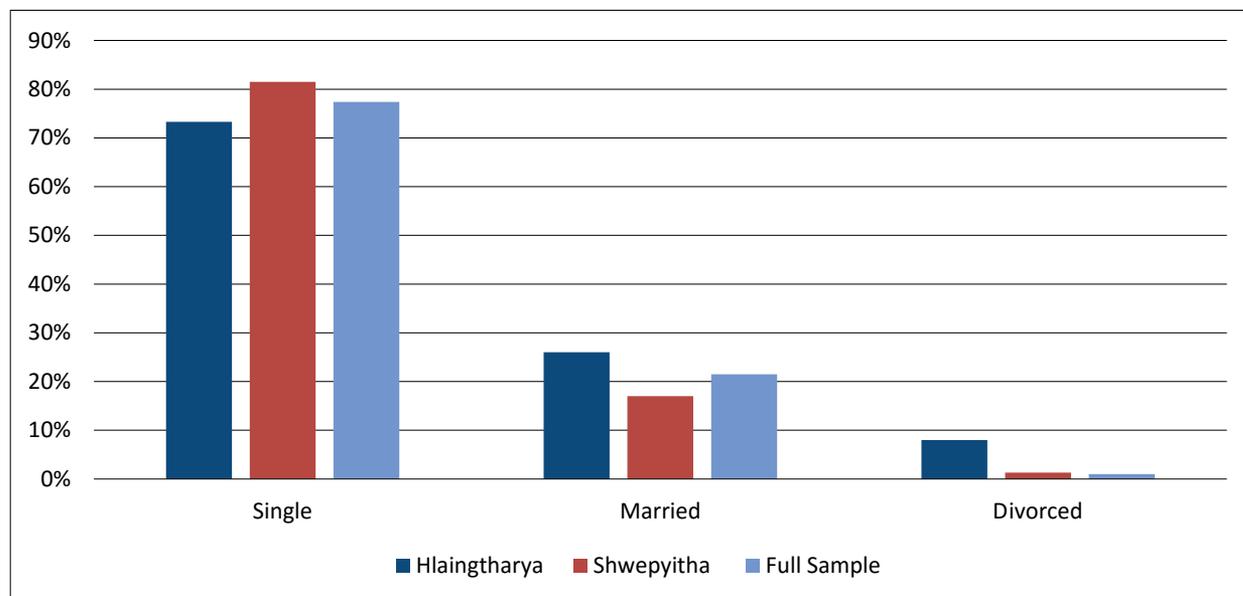
Given the high proportion of migrants and their relative youthfulness, marriage rates among sampled workers were low. Just 22% of the sample is married, with rates somewhat higher in Hlaingtharya (26%) than in Shwepyitha (17%). The proportion of divorced respondents is similar (8% and 1%, respectively). This is the first in a series of indicators that suggest the garment sector workforce in Hlaingtharya is somewhat more established, while the Shwepyitha workers tend to be marginally younger, less experienced, and newer to Yangon.

Those who reported being married were also asked if they had children, and only 38% reported having children, with higher rates once again being seen in Hlaingtharya: 45% vs 29% in Shwepyitha.

LIVING SITUATION

In seeking to get a better understanding of workers' connections to their current townships, the survey asked a number of questions about how they lived. The first of these was how long had they resided in the township. Over 33% reported that they had been in the township for less than a year. Figure 8 shows the breakdown in answers more clearly, but this suggests that in-migration has expanded rapidly since June 2016. Notably, Shwepyitha had a higher proportion of workers arriving in the last year (37% to Hlaingtharya's 31%), while well-established (four years or more living in the township) workers were predominant in Hlaingtharya (29% to 19%). This suggests that while Hlaingtharya continues to grow, Shwepyitha is experiencing faster growth as a 'new frontier' for migrant workers in the garment sector. Overall, however, it is clear that workers tend to be migrants: 76% have lived in their township for less than four years.

Figure 8: Years Living in Current Township

Figure 8: Years Living in Current Township

Figure 9: How many family members do you live with?
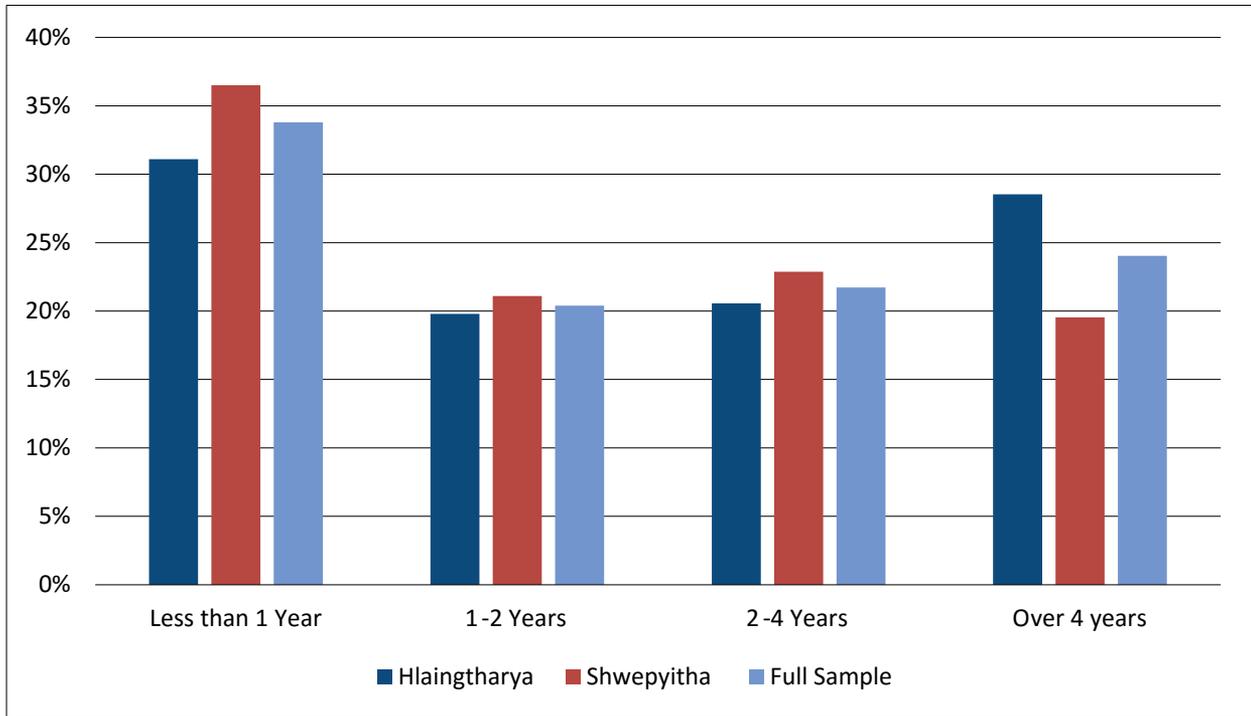
Figure 9: How many family members do you live with?
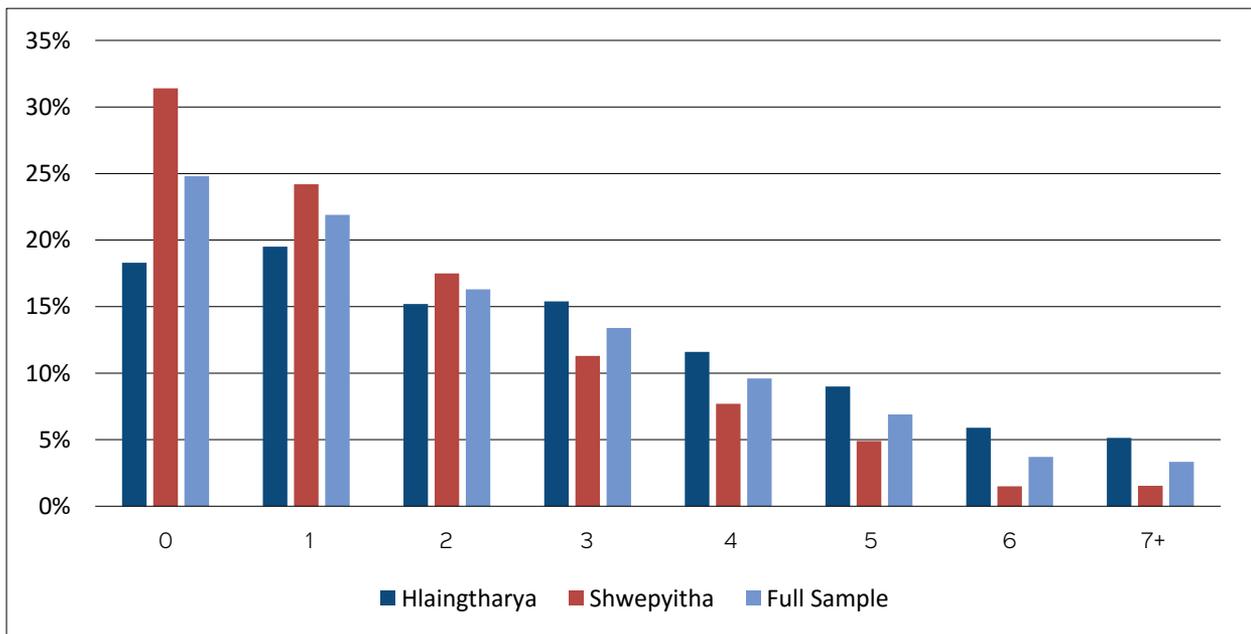
When asked how many family members they lived with, there was a relatively linear distribution, with a plurality either living without any family or with 1-2 members (Figure 9). However, there were clear differences between the two townships, with workers in Hlaingtharya being more likely to live with more family members than workers in Shwepyitha, where almost one third did not live with any family—again suggesting that Shwepyitha workers are comparatively new to Yangon.

CHAPTER 4:
EMPLOYMENT CONTEXT FINDINGS

FACTORY OWNERSHIP

The first question the survey asked regarding garment workers' employment was whether they knew if the factory was foreign owned, Myanmar-owned, or a joint venture. As found in other studies, which identified as many as 95% of factories in and around Yangon as being foreign-owned,[6] 90% of workers knew that they worked for a foreign owned company (Figure 10).

Figure 10: Ownership of Respondent's Factories
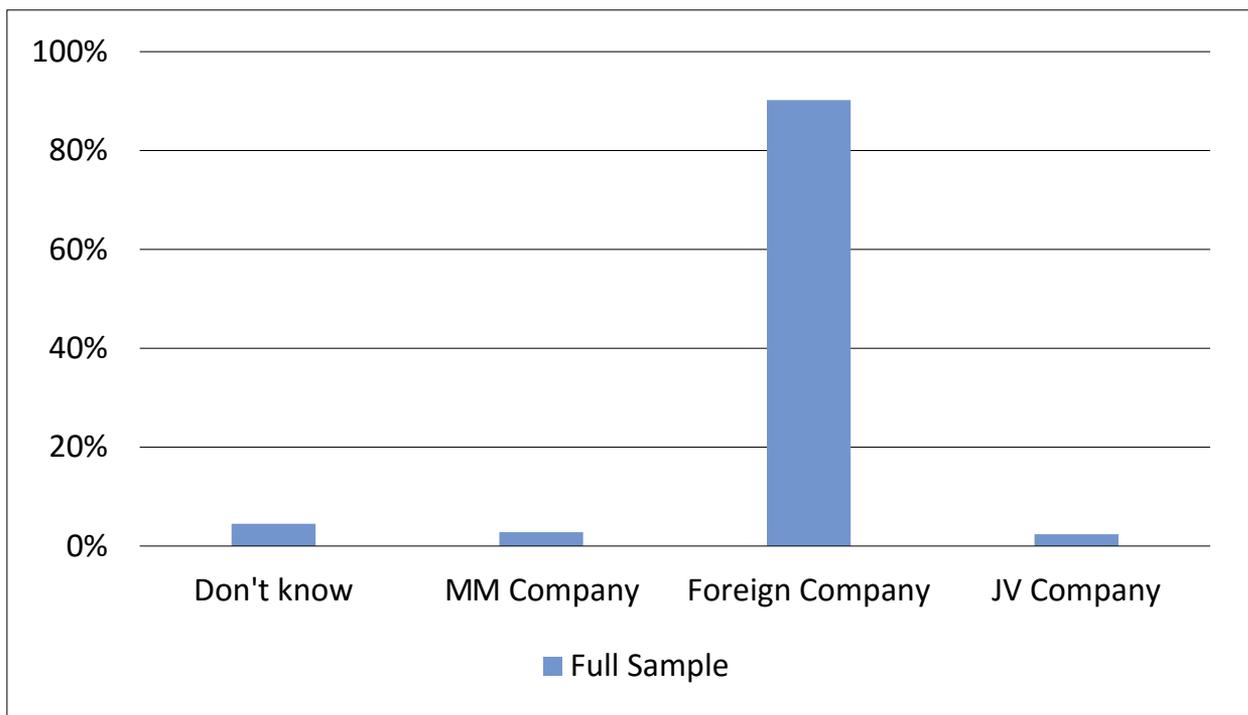
CONTEXT OF THEIR CURRENT POSITION

CURRENT ROLE AND REASONS FOR JOINING THE SECTOR
Inside the factory, the majority of workers' work as sewers. 60% across both townships engaged in this most recognisable garment sector activity. However, there are several other positions filling between 5% and 10% of worker activity, namely cutting (5%), quality control (9%), and 'general helper' (7%).

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[6] Impactt Limited. From Boycott to Boom? A Socio-Environmental Map of Myanmar's Garment Industry in 2016. September 2016. P. 8

Figure 11: Job within the Factory
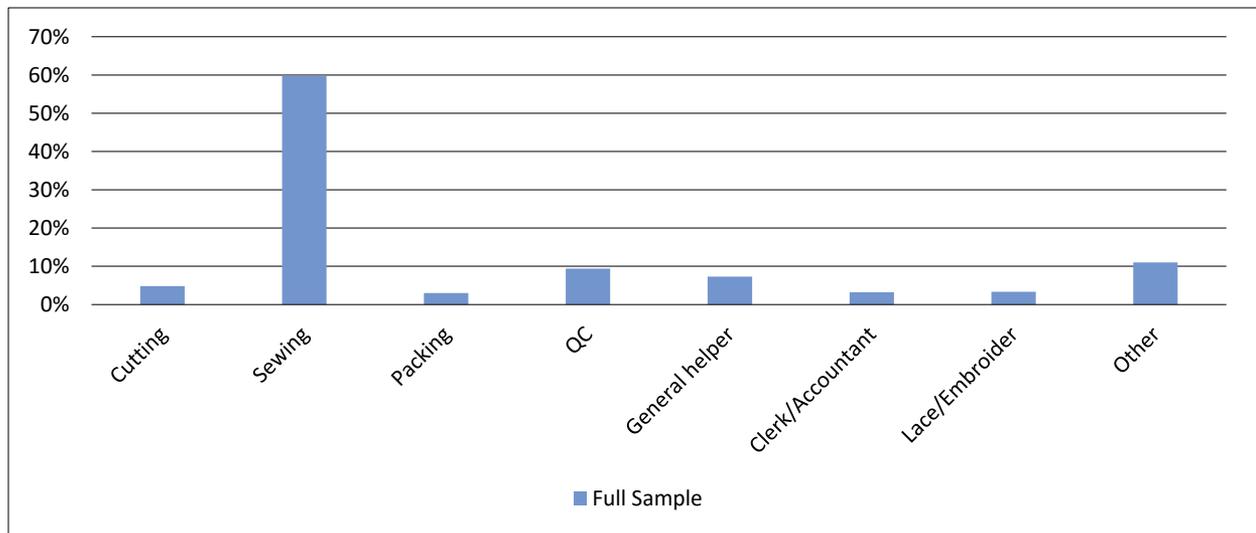
Position held was one area where notable differences between genders were identified. While the number of male respondents means that findings are only indicative, there were almost no male helpers, quality control workers or clerks. Men working on the factory floor tended to be responsible for cutting (10 out of 45 male respondents), sewing (8 respondents), and 'other' (22 respondents, generally mechanics or security guards).

The qualitative work delved deeper into the reasons behind the workers' decisions to join the garment sector. Most FGD participants privileged so-called 'pull' factors, such as the attraction of a regular salary that was perceived as both fair and higher than other options they might have had. Factory work was less physically demanding than agriculture and garment factories tended to be cleaner and have fewer odours than other factories. Networks were also cited as being important with many joining the sector, or often a specific factory, because they knew someone who already worked there. Finally, there are few prerequisites for garment sector employment, including, in some cases, not having to provide documentation of education. Additionally, a handful of 'push' factors were cited including the lack of job opportunities in rural villages, personal or family expenses/debt, and lack of formal education that would enable a better job. Though not cited as the main reasons for selecting the garment sector, workers repeatedly referred to the need to financially support family in rural areas.

EXPERIENCE AND ADMINISTRATION
Rapid turnover has been cited in news reports as a challenge facing the garment sector but the survey evidence suggests it is not as big a problem as perhaps perceived. Participants were asked how long they had been at their current job and there was an almost even split across the categories for those who had been in the position, with a slight plurality of those who had worked in the same factory, for 1-3 years. While 50% held their job for less than a year, this might appear to reflect the high turnover (particularly from the perspective of a garment manufacturer). However given the rapid in-migration, the number of recent migrants (see the previous section on time living in their current township), and booming opportunities for experienced garment sector workers, suggesting that it could be much higher.

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[7] For example: Myanmar Times, 18 August 2017: Are Factory Jobs Good for the Poor? Evidence from Myanmar.

Figure 12: Length of Employment: Current Factory
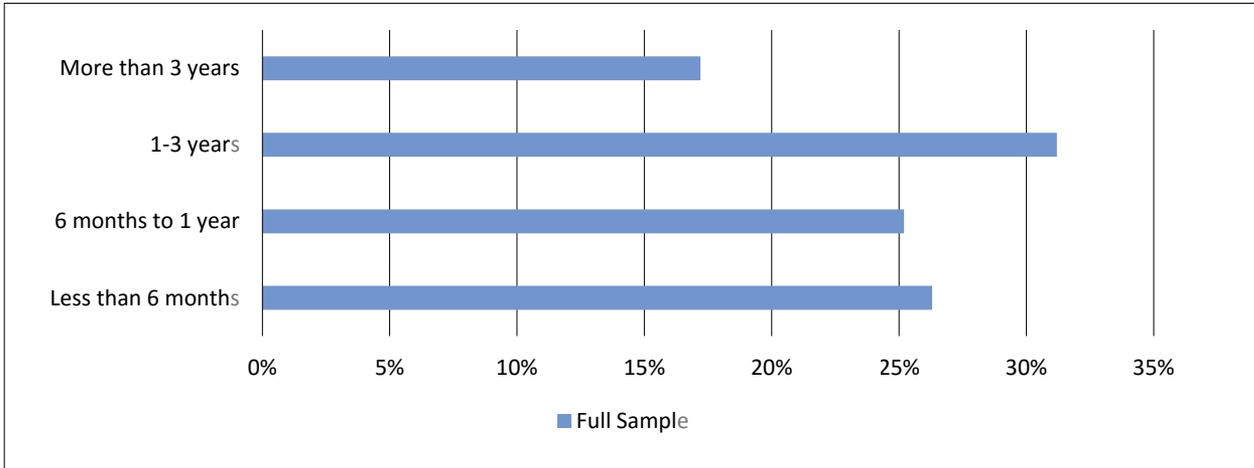
Workers were asked both about the number of hours worked and the number of days worked per week. Neither question produced surprising results, with 90% reporting that they worked between eight and ten hours per day and another 8% reporting that they worked up to 12 hours in a normal day. The workweek was similarly uniform, with 99% of workers reporting they worked six days per week. While expected, these numbers help to confirm that the sample was uniform in capturing workers employed in the formal garment sector rather than more ad hoc or informal positions.

Figure 13: First Job in Sector
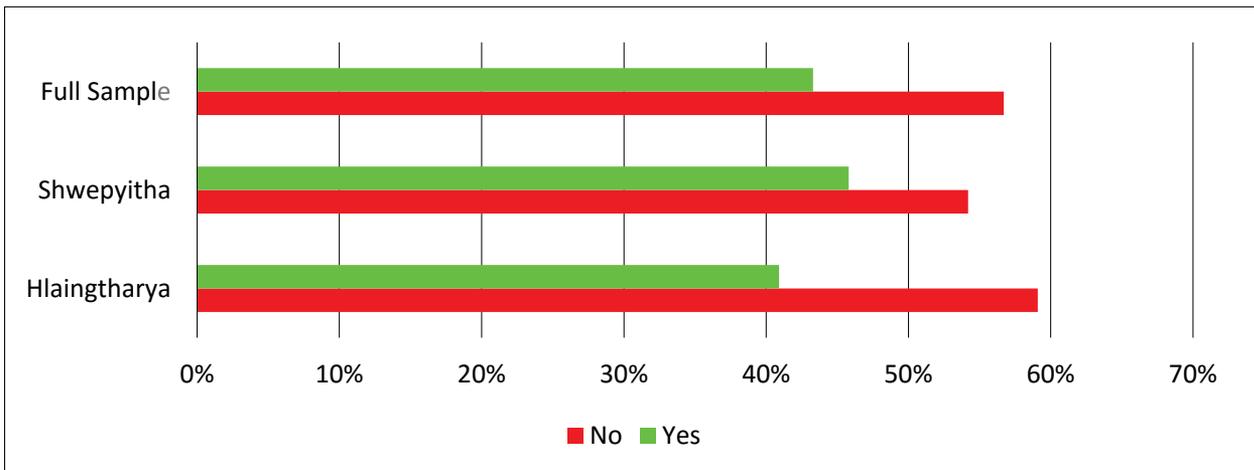
As Figure 13 shows, first-time employees were slightly more prevalent than workers who had changed jobs at least once. For non-first time workers in the garment sector, Figure 14 indicates the reasons they left, with a notable clear plurality of leaving due to bad pay. This highlights for the first time the primacy of salary above other considerations for most workers, a trend which is repeated elsewhere in this section and in the following chapter on income and savings.

The qualitative work, however, indicated that workers face additional challenges beyond those that had caused some to leave their jobs. Chief among workers' complaints were the issues of factory rules and massive workloads; factory rules were often cited as oppressive, with severe restrictions on breaks (including lunch or bathroom) to other prohibitions on thanaka, betel, or snacks. Also, a lack of time to drink water was reported by some workers, and leave restrictions

were also burdensome (listed as the primary problem for most Hlaingtharya workers), in part because any leave (sometimes including sick leave) generally resulted in the forfeiture of monthly attendance awards and hence a reduction in one's salary. One focus group in Shwepyitha with two male participants highlighted a few challenges that are particular to men, saying that it is more difficult for men to find work; this is partly because owners are more likely to think that men are labour leaders and will instigate strikes.

Figure 14: Reasons for Leaving Previous Garment Sector Position
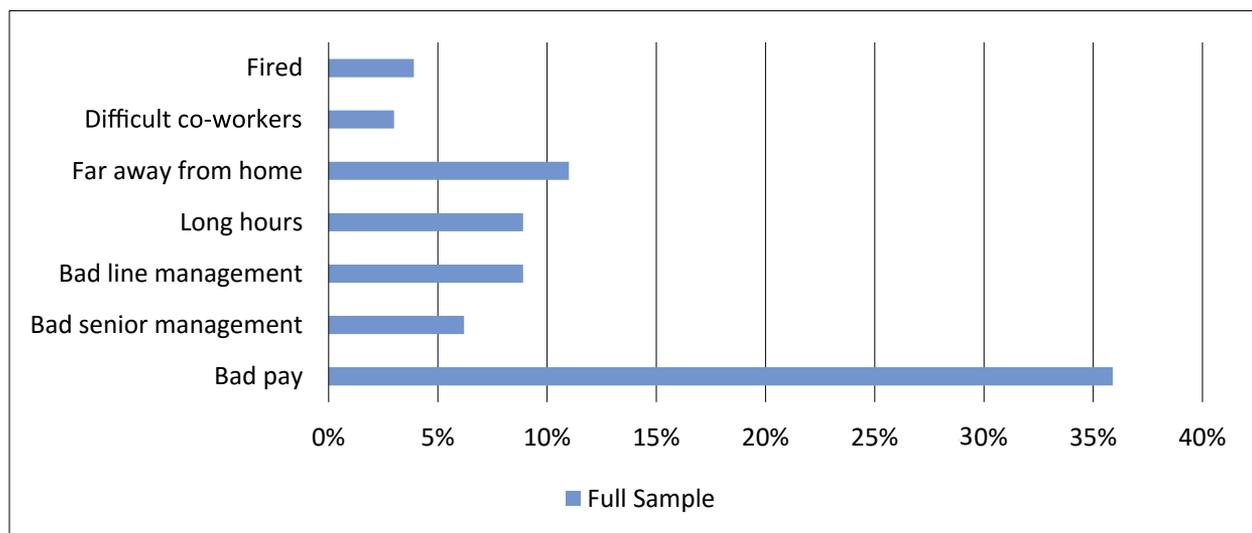
When asked about their current relationship with their employer, it is clear that many workers remain vulnerable to exploitation over the employment status. While 86% have an ID card that identified them as employees, for many that was the only written evidence of their position that they possessed. Moreover, just 29% reported having a written contract and in the focus group discussions the 'contracts' mentioned were often just lists of rules that the worker signed at the bottom.

Figure 15: Possession of Written Proof of Employment
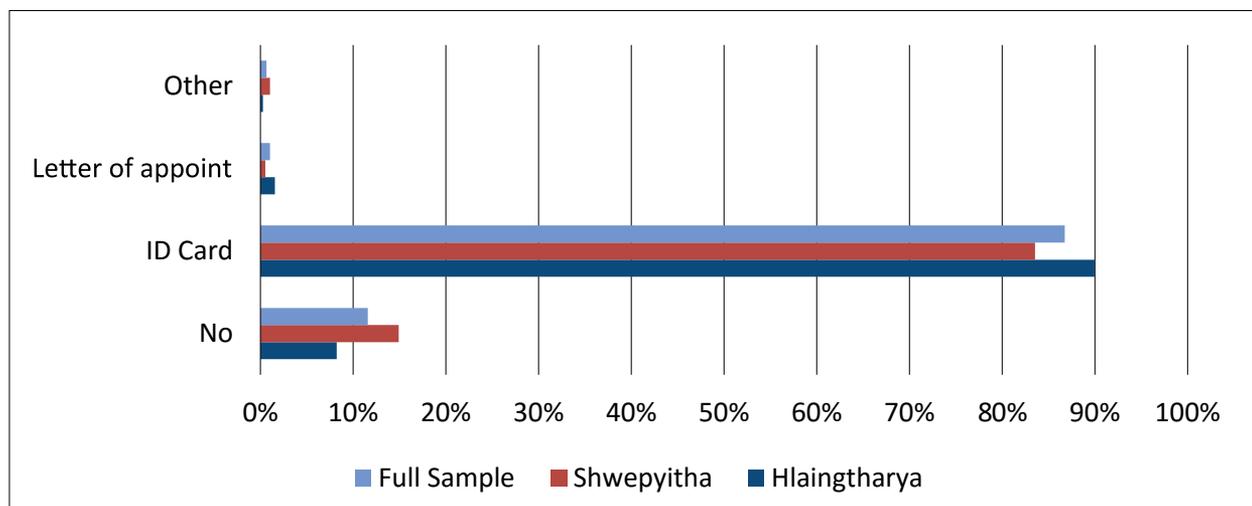
EXPERIENCES OF ABUSE IN THE WORKPLACE

As with most general surveys, capturing the problem of abuse in the workplace is extremely challenging due to the sensitivities of the subject matter and the limitation of time and capacity of the interviewer to develop the necessary trust to capture these issues. Nonetheless, the survey asked a series of questions to try and understand the prevalence of certain types of abuse and who, if anyone, would workers turn to for help when they experienced or witnessed such abuse.

Verbal abuse was the most common, with 39% of respondents reporting that they had experienced it or knew someone who had experienced it, and was notably higher in Hlaingtharya (46%) than in Shwepyitha (32%). Of those, only 16% sought assistance and most of those went to a senior manager (17 out of 49 who reported seeking assistance). While 12 went to their line manager and 10 went to a labour union representative. It should be noted that as respondents discussed this question with researchers, it became clear that not all shouting criticism was considered abusive. If the verbal critique, no matter how loud, was conducted by either someone who was their 'senior' or someone they understood to be in a position of correct authority, it was not perceived as abusive and was not taken as a serious workplace problem, though they did feel bad about such instances. The focus groups confirmed these findings, with 'scolding' reported as a common occurrence.

Experiencing or knowing someone who had experienced physical abuse was reported by 5.4% of respondents, with a handful more cases reported in Hlaingtharya. 33% of them reported seeking assistance, but such sample size makes it impossible to produce strong claims about the nature of assistance or who they sought out. Of the 14 who asked for assistance, five went to the labour department, three to the line manager, and four to a labour union. Although few instances of physical abuse were discussed in the focus groups, two women reported being aware of individual examples in their factories.

Either experiencing or witnessing sexual violence was the least commonly reported, though also this was clearly the question with the highest risk for under-reporting. Twelve respondents reported experiencing or having witnessed sexual violence, or 1.5%. In one FGD in Shwepyitha a worker recounted an instance where a manager touched her arm inappropriately. Shortly after she brought the incident to the attention of her line manager (who then approached the manager), and she, the line manager, and all the other workers on the line quit.

Finally, workers were asked if there was an internal complaints system or grievance mechanism in their factory. 33% reported that there was such a process, while 14% were unsure whether one existed or not. There was little variation between the townships. The FGDs received similar reports, with FGDs in Shwepyitha not sure of any mechanism for redress with two women having stated that the only way to deal with such problems was to quit. In Hlaingtharya some participants suggested there were ways of dealing with such issues, but it depended (1) on the worker's relationship with their supervisor, and (2) on the supervisor's relationship with the manager. The lack of structured information flow was mentioned in relation to these issues and several of the worker activists who participated in a Shwepyitha FGD complained about the lack of grievance mechanisms and formalized information channels. Hlaingtharya FGDs reported only hierarchical top-down information flows either via word of mouth or via loudspeakers. Such systems make upward communication for workers extremely challenging, particularly when dealing with sensitive subjects such as complaints about managers or allegations of abuse.

Figure 16: Does the Factory Have an Internal Complaint Mechanism?
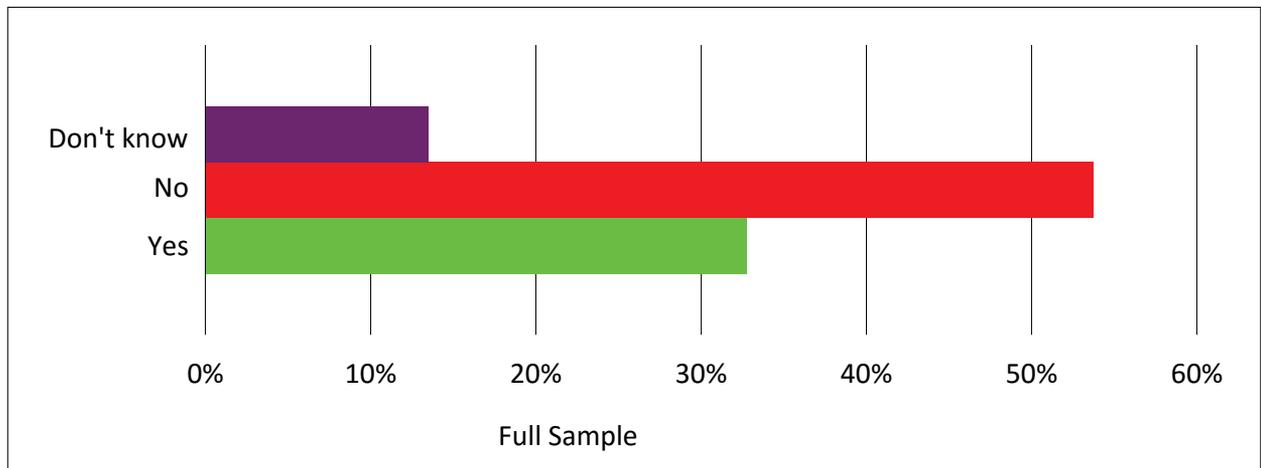
LOOKING FOR A JOB AND FUTURE PLANS

The next series of questions dealt with job searches and what workers would value when looking for a job in the future. It is immediately clear that personal networks are key to obtaining a job in the garment sector. Just under 50% of respondents said a friend helped them find their current job with another 32% reporting it was a family member. Less than 1% used a paid agent, while between 5% and 10% gained employment either through answering a vacancy poster or went from factory to factory asking.

Looking to the future, workers felt similarly about a potential job search as they did about the one that got them their current position. As Figure 17 shows, 64% felt their friends would be the best way to find a job, with family member falling to 10% along with vacancy announcement (11%), and while direct inquiries with a factory accounted for 13%. There is little difference between townships on the matter of job searches.

Figure 17: Best Method for Finding a New Job
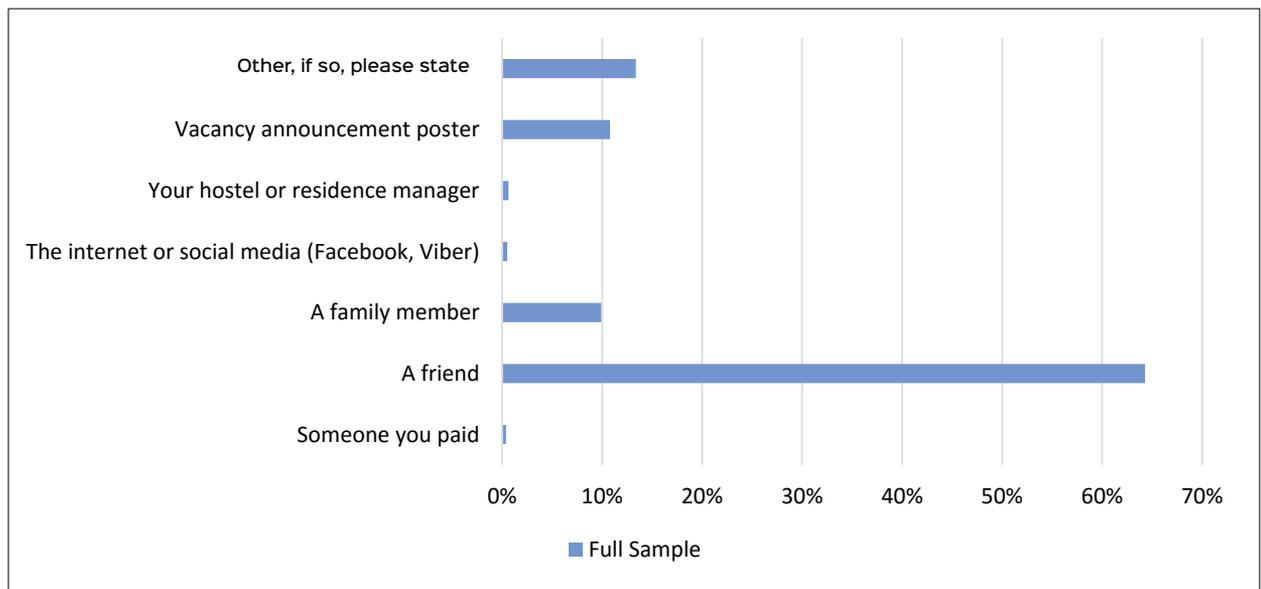
When asked about what would be the most important characteristics (respondents were asked to list three) of a future job, the emphasis on pay is clear; 67% of workers cited base pay as the most important factor in choosing a future job. Good management came a distant second at 12%, but was chosen as the second most important factor by 25% of workers followed by base pay (18%), and location (11%). However, 18% had no opinion on a second characteristic, which rose to 54% when asked about the third most important characteristic (no other characteristic reached 10%). Workers' preferences are clear: they care most about base pay and somewhat about the management of a factory, yet their list of priorities is short.

Figure 18: Important Characteristics of a New Job
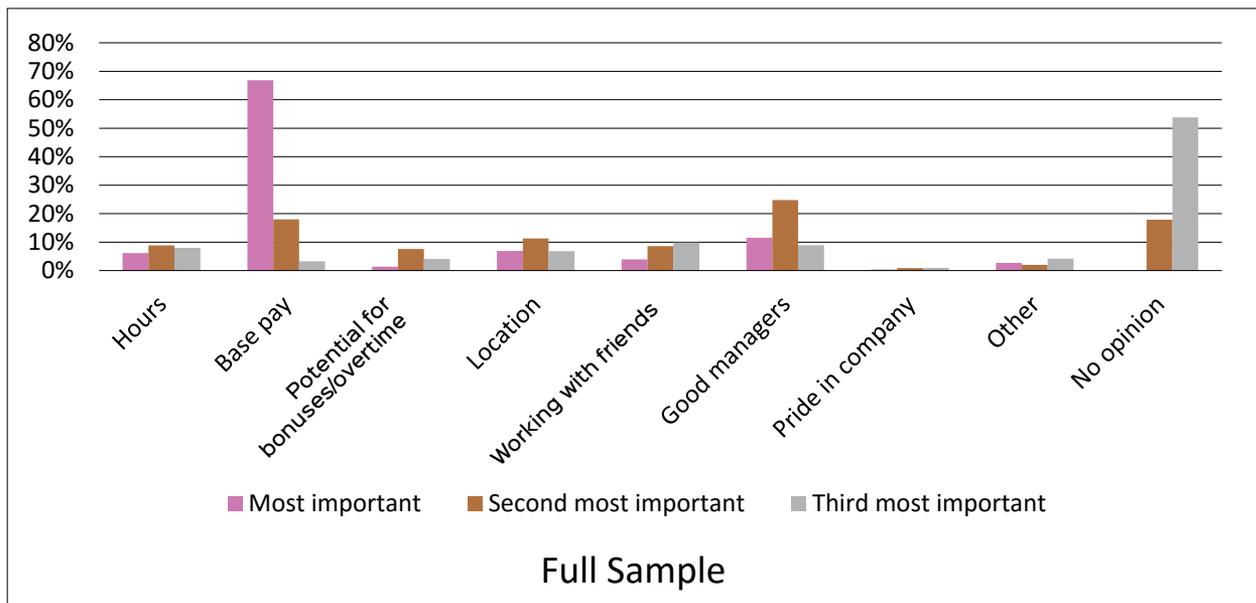
Once a new job was found, FGDs reported that the hiring process itself was quite rapid. A short interview with managers was generally held and included questions on punctuality, ability to work overtime, marital status, and even pregnancy. If the job seeker indicated that they had experience, a skills test was often administered. If an applicant demonstrated trouble reading the various forms, a literacy test could be administered—workers were often required to be able to read/write the numbers 1-100 in English and understand the Burmese alphabet. With these tests completed, workers often started within three days. Participants reported little in the way of orientation beyond the rules list which workers had to have signed to confirm they understood.

The trajectory of workers' preferred future was captured by the question asking what job they would like to have next. There was a particularly interesting split between those who were happy in their job and did not want to leave (36% across the sample, slightly higher in Shwepyitha at 40% to Hlaingtharya's 32%) and those who wanted to leave garment work entirely and enter a different sector (40% overall, again higher in Shwepyitha at 45% then in Hlaingtharya at 35%). Just 13% were interested in a more senior role at their factory; two focus group discussions reported having a more senior role brought with it additional risks, both in terms of failing to meet expectations and the potential for more verbal abuse from upper management. This suggests more senior positions, such as line managers, are not necessarily desirable from the perspective of many workers.

Figure 19: What is Your Preferred Next Job?
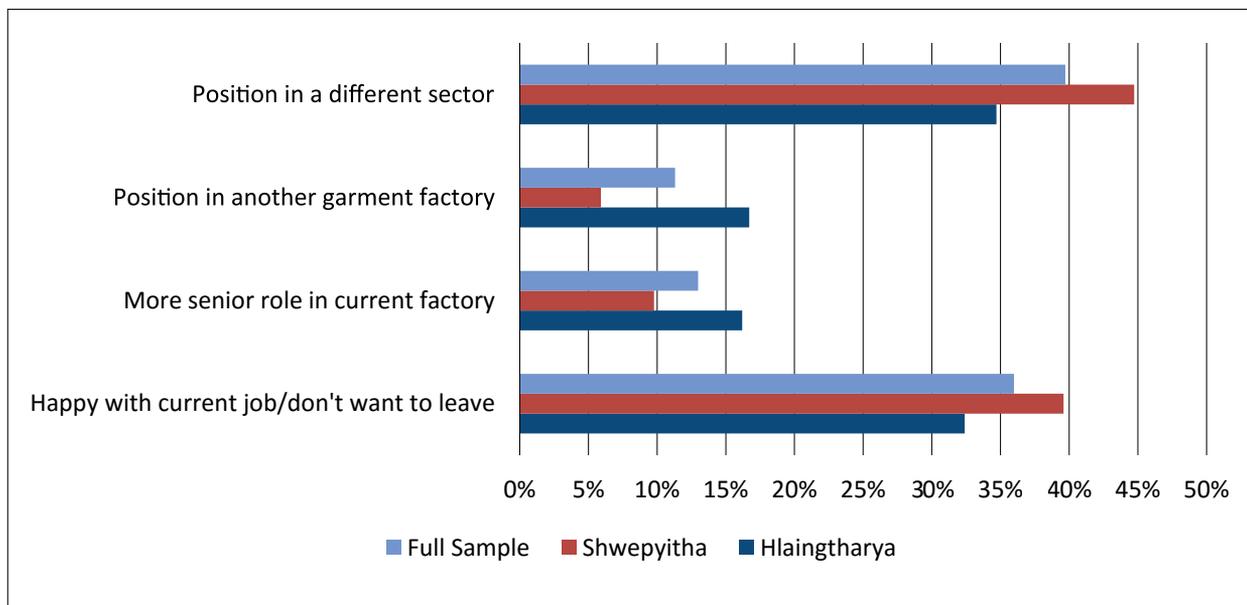
There are clear differences in outlook, however, when preferences for their next job are examined through the prism of education levels as shown in Figure 20. Those with just a primary education were more likely to be happy in their current job and uninterested in changing (46%) than those with either some high school (30%) and were much more likely than high school graduates (15%). On the other end of the spectrum, 64% of those who had graduated high school wanted to change sectors compared with just 27% of those with primary-level education. This emphasizes the point that among less well-educated workers, the garment sector is perceived as a 'good' job with a regular salary and better working conditions than many alternatives available. But for the better-educated workers, it is perceived as a stepping stone to something entirely different.

Figure 20: Preferred Next Job by Education
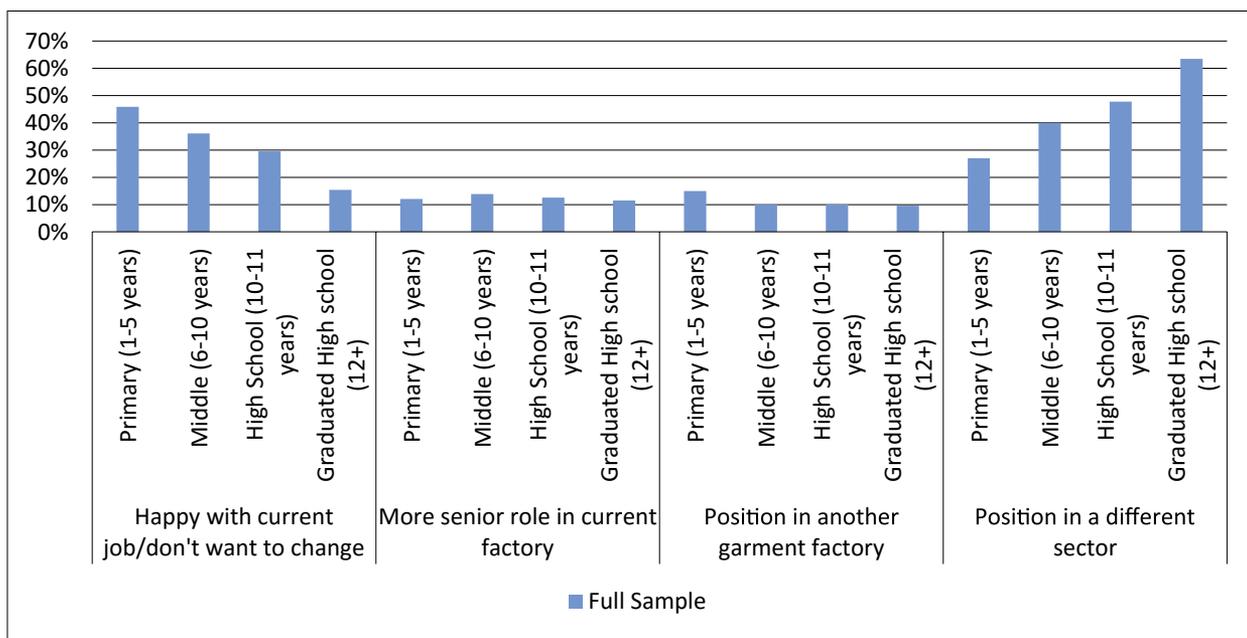
ENGAGEMENT WITH LABOUR RIGHTS GROUPS & UNIONS

Workers' engagement with their rights and unions was the final focus of the employment context section of the survey. Workers were first asked if they had heard of labour unions, and those who had were then asked a subset of questions regarding their views on unions and the level of exposure they had to union activities.

AWARENESS

Just 54% across the sample had heard of unions, though there was some difference between the two townships. This reflects the greater level of advocacy and union activity in Hlaingtharya where 58% had heard of unions compared to 50% in Shwepyitha.

Figure 21: Have You Heard of Labour Unions?
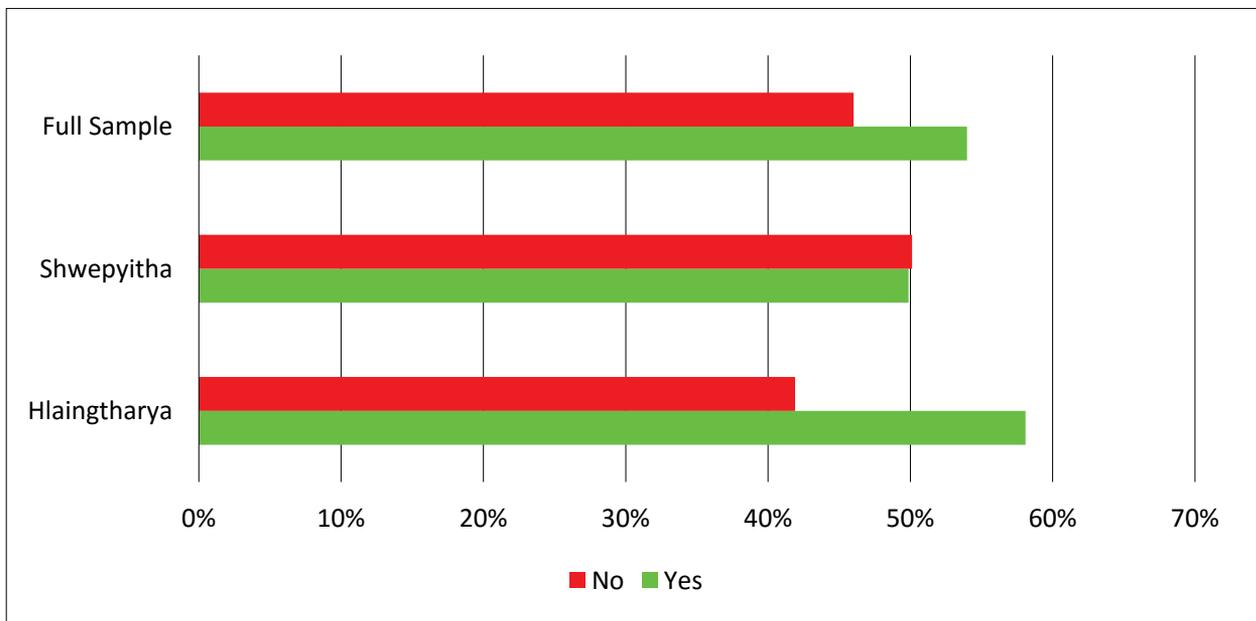
The 54% were given a list of potential purposes of unions and asked to mark which they felt were within the purview of union activities. The most common answer, listed by 56%, was 'don't know.' Of the substantive answers, 35% agreed that unions 'represent workers and their rights', while 11% identified protesting for more pay. Hlaingtharya workers were marginally more likely to see unions as having more confrontational purposes with 14% agreeing that a union's role is to protest for more pay (compared to Shwepyitha's 8%) and 10% stated that their purpose was to 'stand up to managers when they are treating workers badly' (compared to 6% in Shwepyitha).

Figure 22: Purpose of a Union (Multiple Answers Allowed)
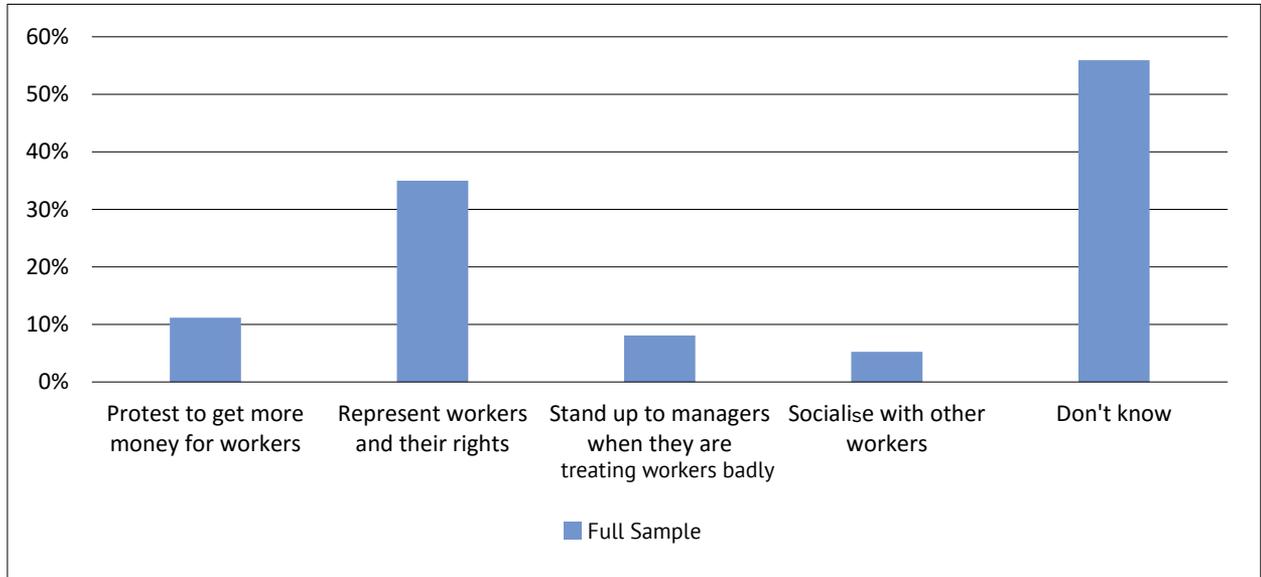
INTERACTION

Workers with an awareness of unions were asked about their direct interactions with unions. First, whether there were unions in the factory, to which 35% responded that there were and 15.5% were unsure (Figure 23). Union presence was higher in Hlaingtharya (40%) than in Shwepyitha (29%) and Hlaingtharya workers were also more aware, generally, of whether unions were present or not (only 13% unsure compared to 19% in Shwepyitha).

Figure 23: Are There Unions in Your Factory?
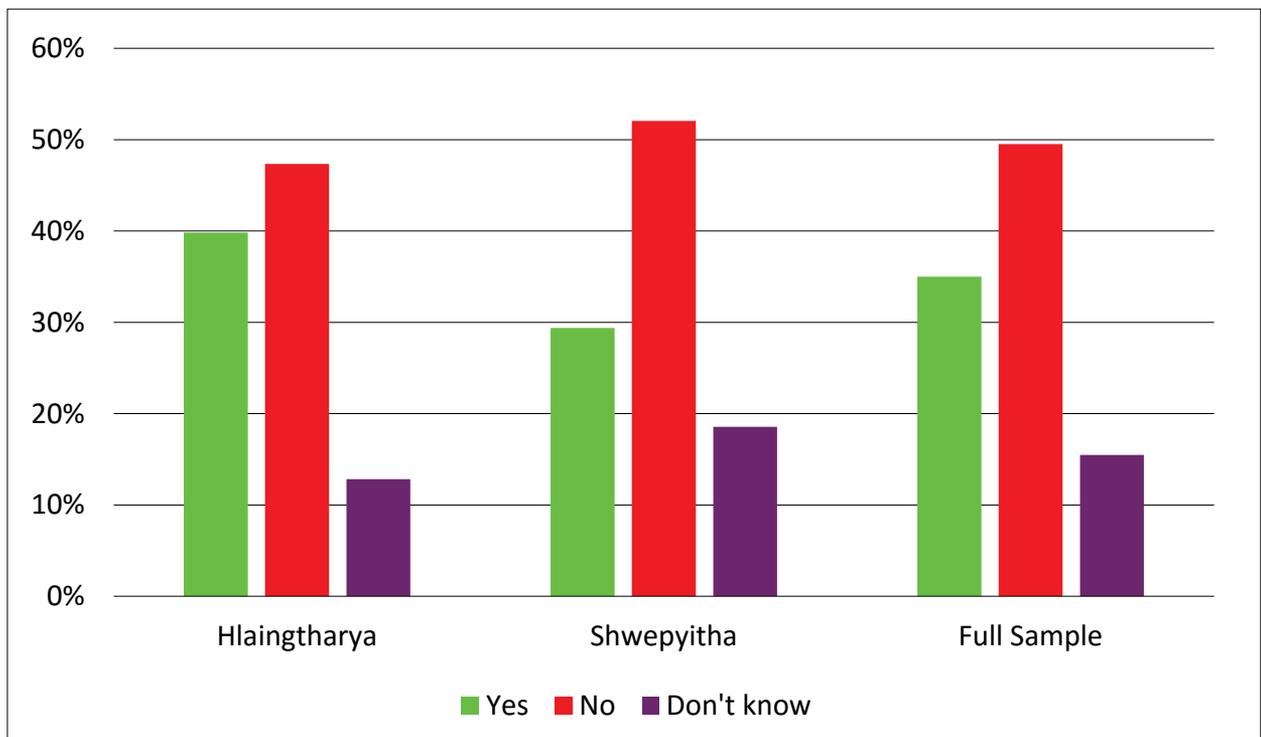
Workers generally had heard about unions from co-workers and their seniors in the factory, with these two answers accounting for 81% of union awareness (Figure 24). Union representatives were credited with informing only 10% of workers about a union's presence. Hlaingtharya was more likely to cite co-worker while Shwepyitha were more likely to cite 'senior', but the effect is largely the same.

Figure 24: If There Are Unions in Your Factory, How Did You Hear About Them?
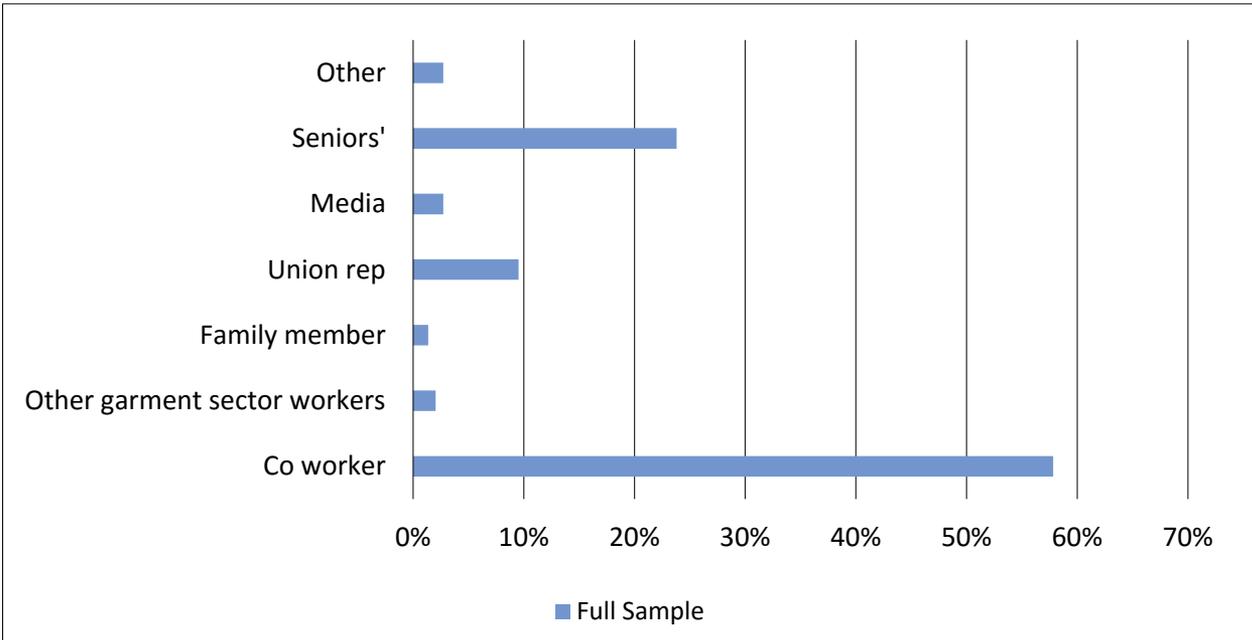
Of those who had (1) heard of unions, and (2) knew there were unions in their factory, just 15% were members while another 3.5% were not members but attended union events. Put another way, of a 778-person sample, there were just 22 union members and five people who attended union events as non-members.

Figure 25: Are You a Member of a Union?
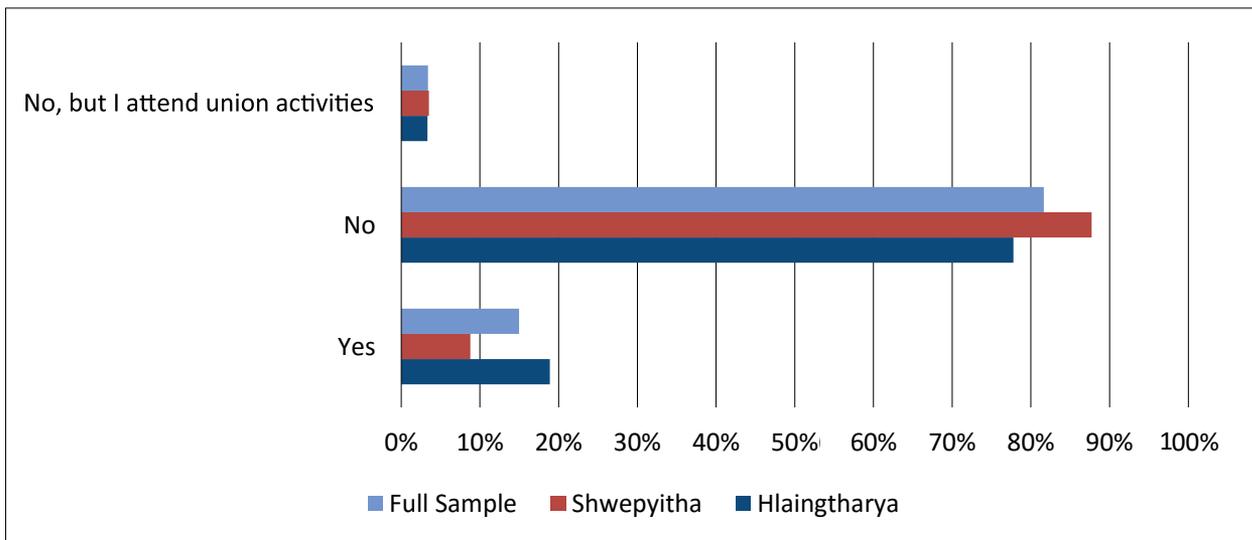
While these numbers are clearly too small to be representative, indicative findings from the follow-on question suggests that most union members in Hlaingtharya spent less than one hour per month on union activities. Shwepyitha union members, though even fewer in number, were more active, with most spending between one and five hours each month on union activities.

PERCEPTION
Finally, when those who had heard of unions but were not members were asked if they would like to be a member, 42% said they would and 52% said they would not. This is a reflection that unionization is not currently understood as a necessary positive or something worth investing limited free time and resources in.

Figure 26: If You Are Not a Union Member, Would You Like to Be?
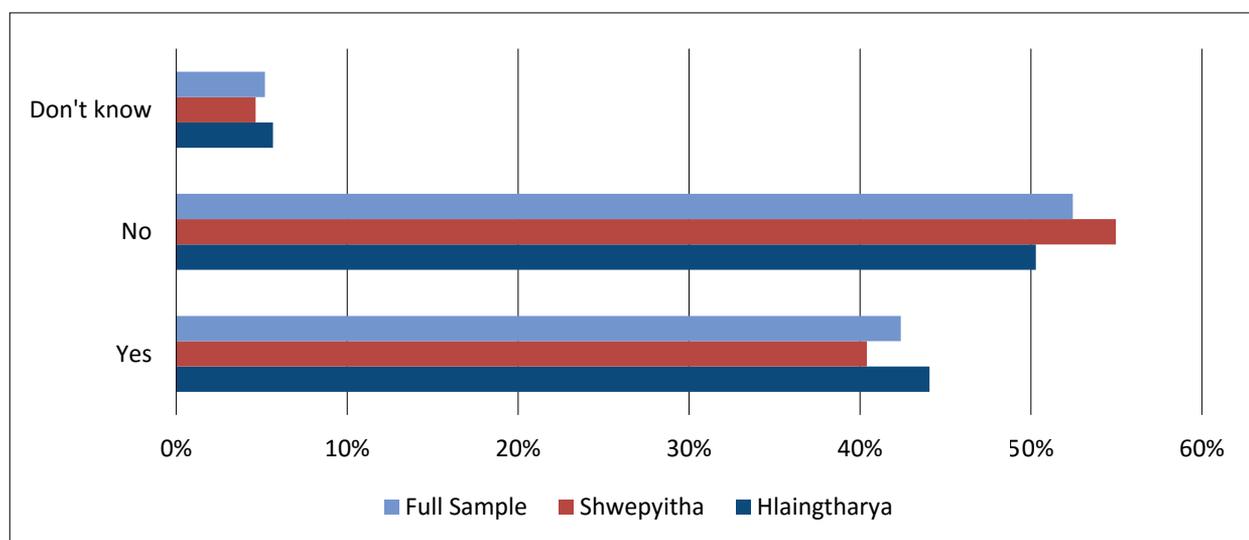
The qualitative findings on labour highlights the relatively limited engagement with formalized labour unions. Few participants reported being in a union and several stated that they had been but decided to leave; for example, one participant left because she did not want to pay the MMK 400 monthly membership, and another left because she did not know the union's new leader. Those in Shwepyitha who had engaged with unions tended to be more involved (again reflecting the findings above), with one male respondent he had been involved in a strike and then arrested.

Focus group discussions also revealed that while few workers were engaged with unions, many (in some FGDs almost half the participants) had more informal labour representation within the factory. These representatives, elected by the factory's workers themselves, represented the workforce in negotiations with management (a mix of senior managers and owners depending on the factory) over issues ranging from holidays, to leave complaints, to salaries. The 2017 government decision to shorten the official Thingyan (Burmese New Year) holiday from ten days to five days, was cited as a key event where the factory-level representation was important.

Workers perceived these organisations as important opportunities for direct representation with the individuals who directly affected their lives (i.e. their factory's owner), but they also seemed to serve owner goals of avoiding strikes and other protest action.

In sum, organized labour appears to be in its infancy within Myanmar's garment sector and has not yet been able to communicate the importance of broader union bodies to the workforce. However, workers are fully aware of the need to negotiate with owners as a group and these factory-level organizations provide necessary representation. Unions are also limited due to how much of the workers extremely limited free time they occupy.

CHAPTER 5:
PERSONAL FINANCES FINDINGS

The survey asked a number of questions targeted at better understanding of how garment sector workers' incomes are calculated, as well as their major expenses, and how they go about making financial decisions. On income, most receive a salary calculated by base pay, overtime, and a series of incentive or performance-based bonuses. Overall, the research confirmed the qualitative findings of previous studies that found that workers were unable to save extensively, and dedicated most of their excess income to remittances to distant family members or to supporting family members in Yangon. The data found that a third of respondents had outstanding loans to interest-charging money lenders, with 6% reporting they had more than MMK 500,000 in debt. Two thirds of respondents reported that they were free of formal debt.

As a side note on the questions, income is a notoriously challenging subject to capture for a variety of reasons. Chief among them is that income frequently has a high variance from month to month, even among salaried positions (due to varied bonuses and overtime pay), and that in Myanmar incomes are thought of as being less individual sources of cash and more as a contribution to a family-group income. However, it is useful to provide an indicative figure for reference. The numbers below are from individual responses during the focus group discussions, and as such they are not statistically valid and are for indicative purposes only.

For salaried workers earning the minimum wage (accounting for the vast majority of workers with more than six months' experience), a 24-day working month (i.e. a six-day work week times four weeks), results in a base salary of MMK 86,400. Bonuses and overtime pay together, according to respondents, tended to be between MMK 25,000 and MMK 35,000, resulting in an average monthly pay in the vicinity of MMK 120,000.

SALARY: OVERTIME AND BONUSES

Figure 27: How is Your Salary Calculated?
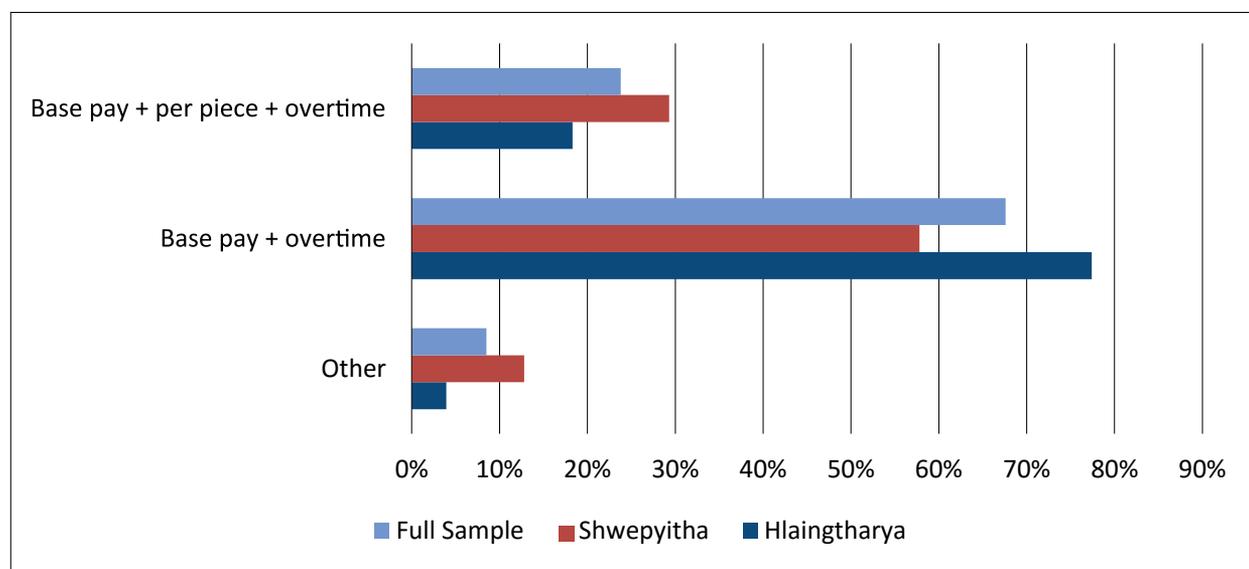
Most workers reported that their salaries were not dependent on base pay alone, but on a calculation that included overtime pay (68%). Salary calculation models, which include per piece (i.e. payment per piece of clothing completed), were also relatively common, particularly in Shwepyitha township. The qualitative work confirmed that salaries are the result of a calculation of a number of different inputs, but also found little variance in those inputs. For most, there is a base salary that is unchanged from month to month and is combined with (1) punctuality/attendance bonuses, (2) 'skills' bonuses (used to pay experienced workers a higher salary), and (3) overtime. All three can vary substantially from month to month, and both types of bonuses are dependent on supervisory recommendations. Attendance bonuses are forfeited after just one day's absences (including annual or sick leave) and any absence could hurt the relationship with supervisors who determines future awards and overtime levels. Just one worker in one focus group reported their factory offered paid maternity leave. A few other forms of bonuses, such as retention/loyalty awards, were reported, but were less common. As discussed in the previous chapter, this relationship-based system places the onus on the worker to maintain strong relations with supervisors and to be 'good' employees.

Workers reported that their base salary is the minimum wage; however, for the first three months of employment their base salary is MMK 2,700 per day, only rising to the government minimum wage when they had finished probation.

Figure 28: Has Your Salary Changed in the Last Six Months?
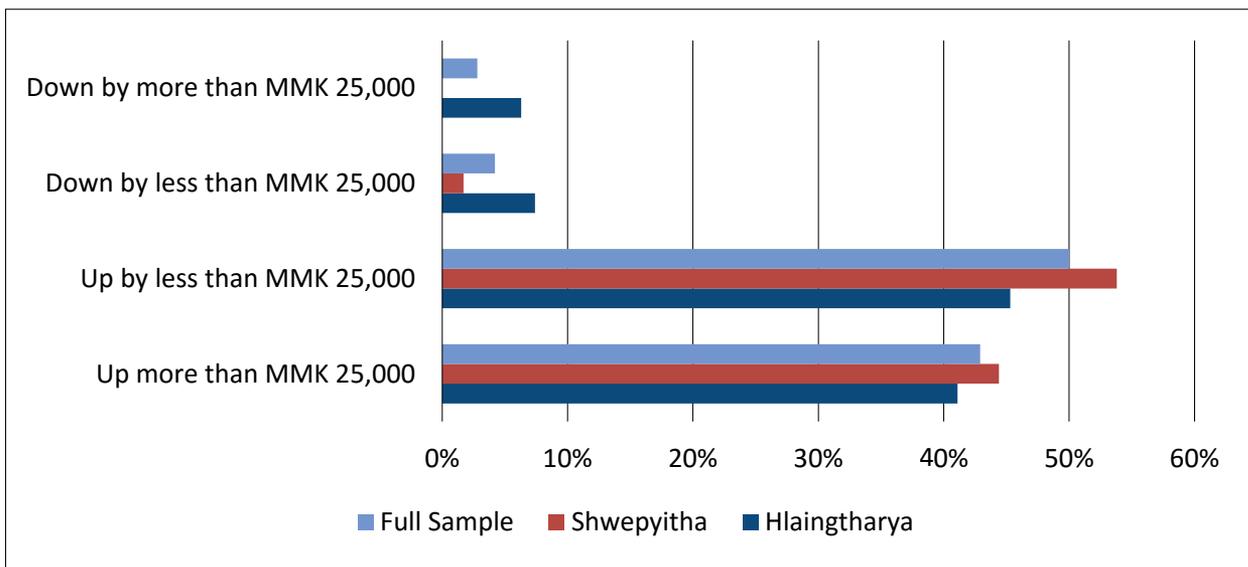
The sample reported salaries to be relatively static, with only 27% reporting that they had changed in the last six months. Of those who had experienced salary changes, almost all said their salaries went up. There was an even split between those who reported their salary had increased by less than MMK 25,000 and those who reported an increase greater than MMK 25,000. Beyond the post-probation bump, focus groups reported that salary increases were solely dependent on additional bonuses and that base pay rarely changed.

Payday is at the start of each month and workers are paid in cash, sometimes in MMK 1,000 notes, which makes it difficult to count and check. One worker reported her salary was directly deposited into an account for which she had an ATM card, but this was a lone exception. There are real challenges associated with both receiving pay and understanding how the amount was calculated. One factory worker reported that they had just ten minutes to check its accuracy, and after that no complaints would be accepted. Other workers said that while a salary slip would accompany their

pay, it was complicated and difficult to understand. In one focus group, several workers showed the facilitator their slips and asked for assistance in understanding what it meant. Furthermore, in another group, workers complained that the salary slip was written in Chinese or English and not in Myanmar language.

Figure 29: Can You Choose to Accept or Reject Overtime?
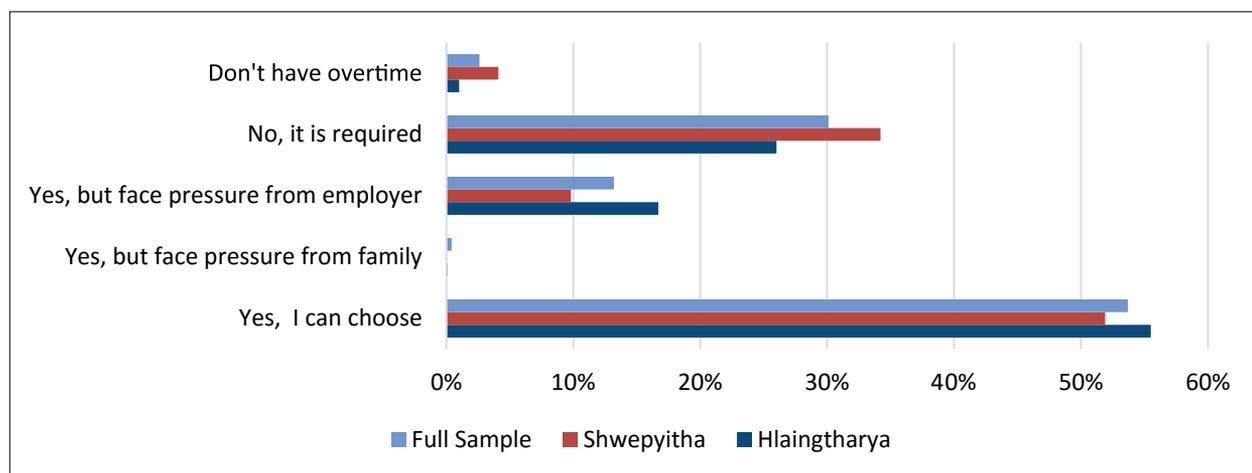
Overtime pay is ubiquitous and necessary given the low base pay of most workers. The focus groups found that overtime generally stretches between one and four hours, on top of the work day, pretty much occurring every day. There are real concerns over the structure of overtime and that in many factories it is essentially required of the workers. The findings support these concerns as shown in Figure 29. Workers described to the survey team that even when they answered 'yes' to the question of whether they could choose overtime, there was always a level of implied pressure to work and there was a concern across the workforce that saying 'no' to overtime could often result in penalties or even termination. Those who reported employer pressure described it as explicit, as in managers saying they had to work or there would be consequences. Finally, those who reported they had no choice described the situation as one where they received overtime assignments with no opportunity to refuse. Additionally, focus group discussions found that as overtime is such an important part of their salary, there is significant financial pressure to take it on.

Figure 30: Do You Normally Receive Overtime Pay Each Month?
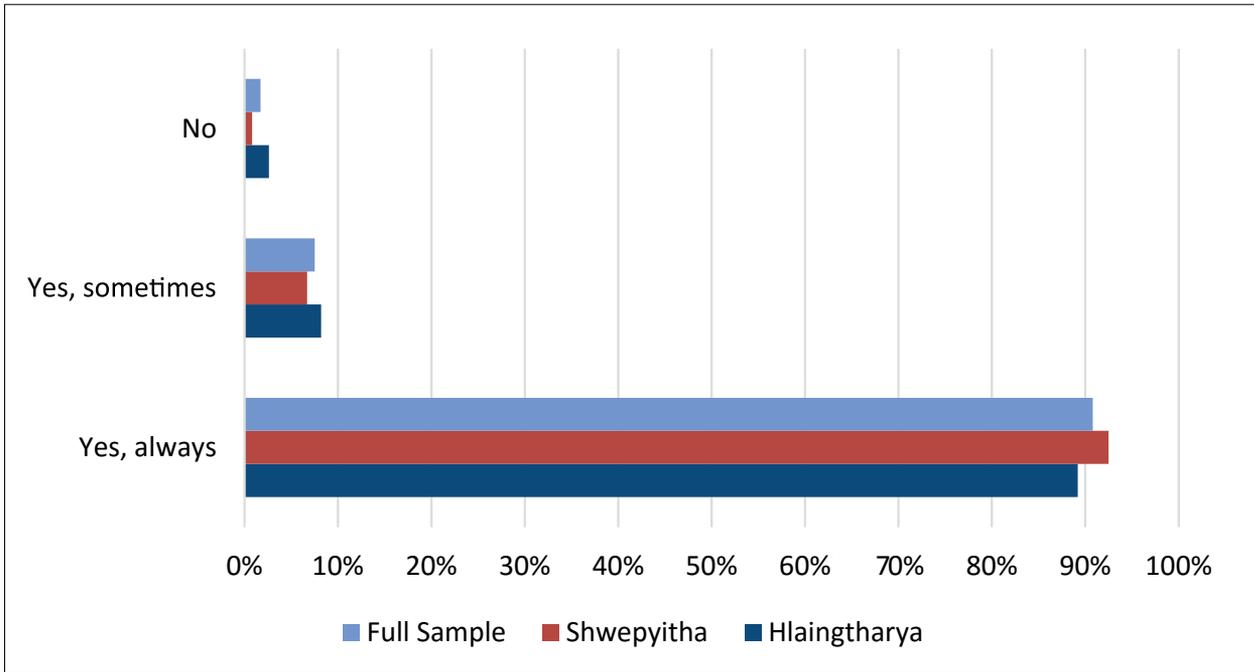
Figure 31: How Much Do You Receive in Overtime Pay?
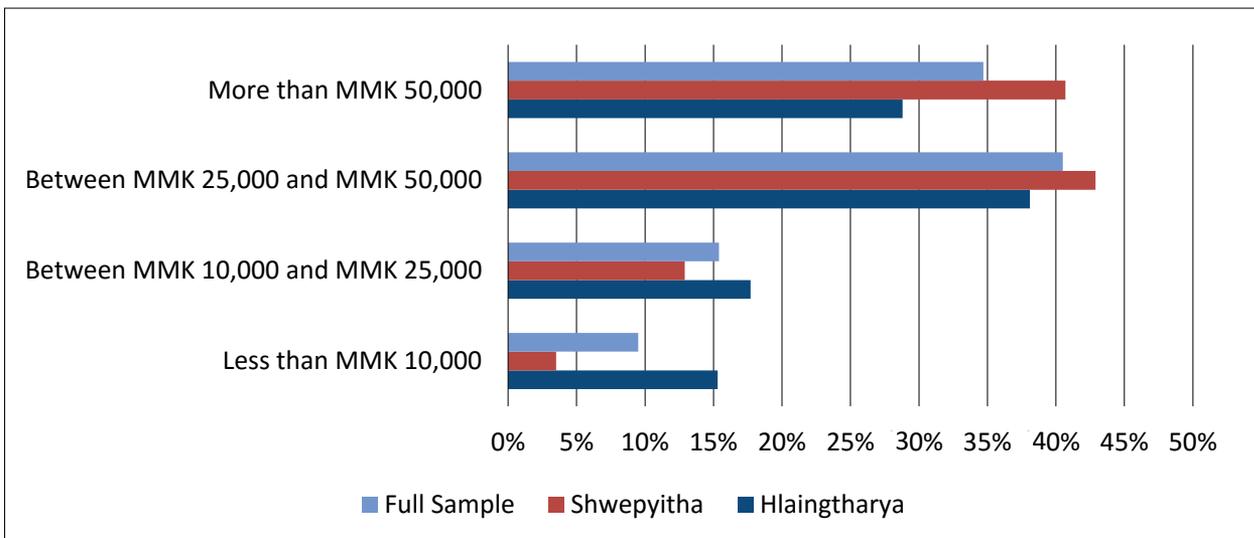
As a result of this system of pressure, almost everyone receives overtime pay each month (91%). The amount of overtime means it is important for workers' incomes, with 46% reporting that they receive more than MMK 25,000 per month a significant proportion of their total salary. High levels of overtime pay are somewhat more common in Shwepyitha with the lowest levels of overtime much more common in Hlaingtharya.

Figure 32: Do You Normally Receive Bonus Pay Each Month?
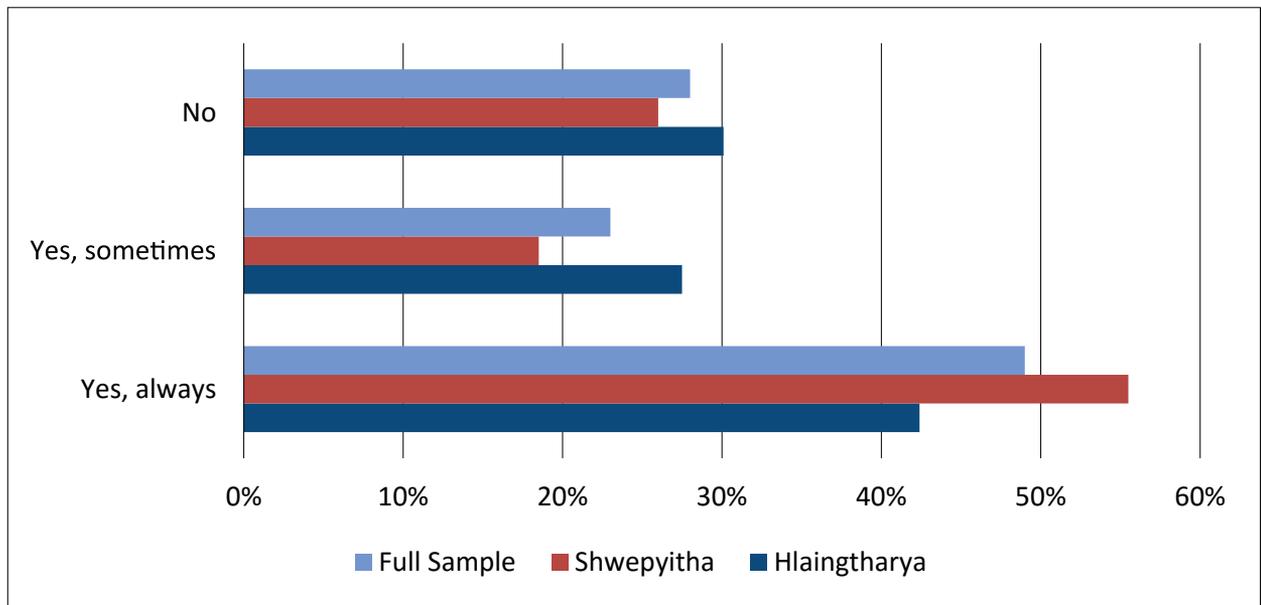
Figure 33: How Much Do You Receive in Bonuses?
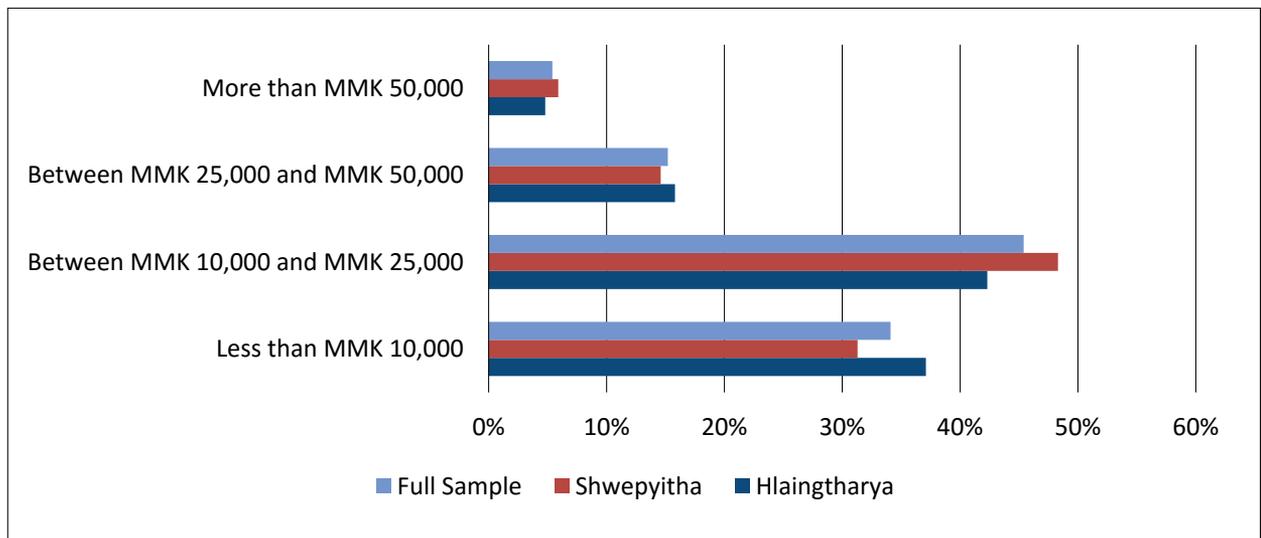
Bonuses are both less commonplace and less integral to workers' incomes, but appear to account for a significant amount of the month to month variation. 49% of respondents reported to always receive bonuses (much higher in Shwepyitha, 56%, than in Hlaingtharya, 42%), and another 23% said they sometimes receive bonuses. The amounts were also less than was common for overtime, with 79% of those who always or sometimes receive bonuses reporting they received less than MMK 25,000 in extra income. The qualitative findings reported that the most common forms of bonuses are for attendance, for worker retention, and an annual bonus at the end of the year that can be as much as a month's salary. Worker retention bonuses tend to happen at the 3-month, 6-month, and 1-year mark, and then on an annual basis.

Figure 34: Do You or Someone Else Make Decisions about Spending?
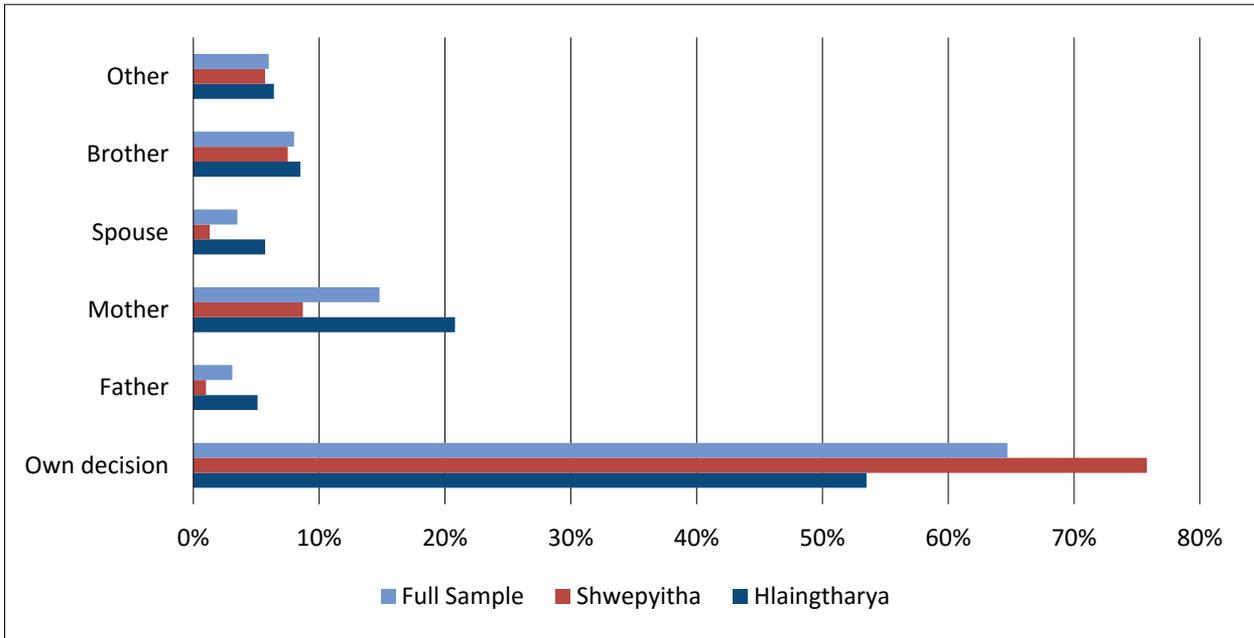
Given that the vast majority of garment workers are women, whether or not they are able to make spending decisions has major ramifications for their independence from parents or spouses. When asked if they made decisions on how to spend money or if someone else from their family did, 65% reported that they made their own decisions. There was, however, clear differences between the two townships: just 54% of respondents in Hlaingtharya have financial autonomy compared to 76% in Shwepyitha. This is likely reflective of the more settled nature of Hlaingtharya where respondents are more likely to be living with their family, while Shwepyitha respondents are more likely to be recent migrants with fewer family members nearby, who are consequently less involved in financial decisions.

Of those who do not make the decisions on how to spend their income, 15% reported their mothers made the decisions (this was higher in Hlaingtharya at 21%), while a surprising 8% across both townships said their brother was responsible for these decisions.

When salaries were brought up, the focus groups tended to have lengthy discussions highlighting how aware they were of the importance of allocating their salary efficiently. Participants said they would first account for their own major expenses (rent and food) before assigning the rest to remittances.

Figure 35: How Much Do You Spend on Housing Each Month?
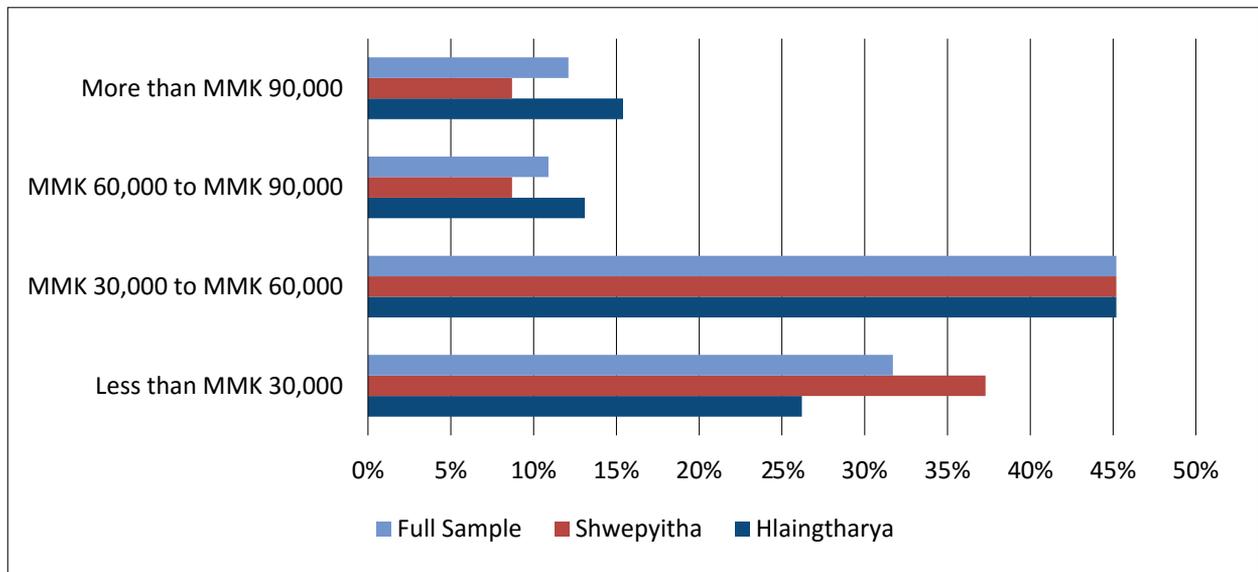
Respondents were asked how much they spent on housing each month, and this was divided into four categories: A clear majority spent less than MMK 60,000 (77%), and it was more common for workers to spend less in Shwepyitha (37% spending less than MMK 30,000) than in Hlaingtharya (26% spending less than MMK 30,000).

Figure 36: Has the Cost of Housing Increased in the Last Year?
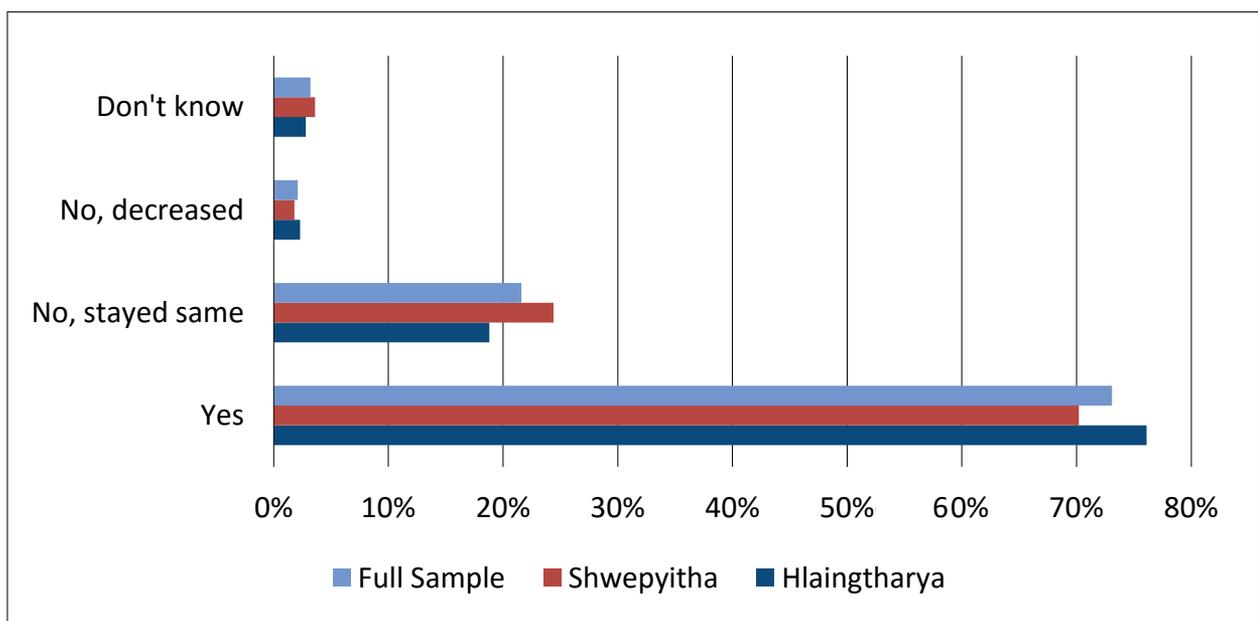
Workers were also asked if the cost of housing had increased in the previous year, and it is clear that for most it is becoming increasingly more expensive to live. 73% reported their housing had gone up in cost, and this is evenly split between the two townships. Taken in tandem with the earlier findings that base incomes for most respondents have not increased over the same period of time, it is clear that workers' incomes, tight as they are, are being stretched even further.

REMITTANCES AND SAVINGS

Figure 37: If You Normally Save Money Each Month, how do You Save It?
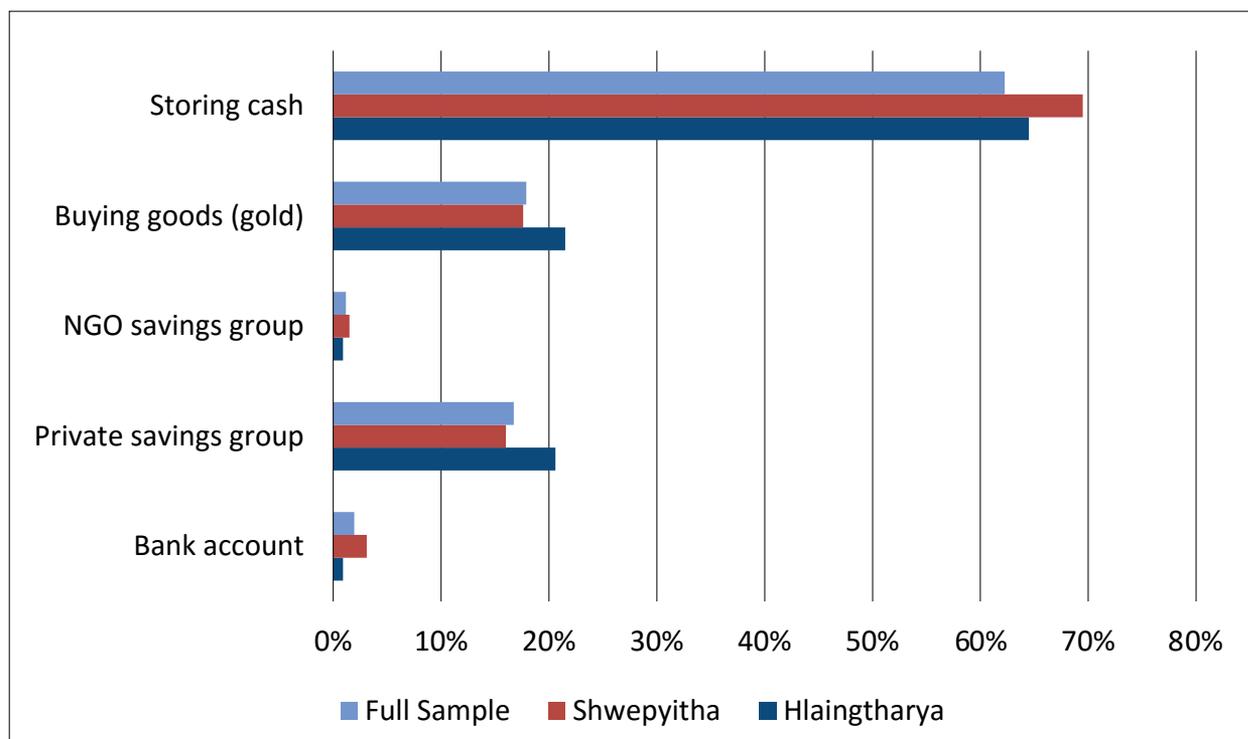
The ability to save money from one's salary is both a marker of financial independence and reflects an ability to build economic resilience to shocks such as illness or being laid off. However, relatively few workers reported being able to save money in normal months. 31% reported saving in normal months, with saving rates slightly higher in Shwepyitha. When the 238 respondents who did save were asked 'how', most (62%) reported that they simply stored cash. Buying valuable goods, primarily gold, and private savings groups were a distant second and third at 18% and 17% respectively, while only five respondents had bank accounts and just three reported using NGO savings groups. The challenge of saving on low salaries with high expenses was reflected in the focus group discussion where only one or two participants generally had savings, and most of those reported hiding cash or giving it to the hostel owner for safekeeping. Some also said that they were part of a private savings group or had bought gold. The focus groups also revealed that those who saved regularly tended to have multiple income sources, e.g., they also lived with a spouse or relative with whom they shared expenses.

Despite the low savings rate, the utility of saving was readily apparent to focus group participants. Those who did save were frequently saving for a particular purpose, including further education (their own or a family members'), travel home, emergencies, or the future though only seven had specific future plans, and five of whom wanted to open their own business.

Remitting money to family in other parts of the country is much more common than individual savings and the qualitative research found that it was the most frequent usage of all extra income. In some ways, the two concepts appear linked, and 'stored cash' described in the savings finding above, may actually be stored by their family rather than in Yangon. As such this could also possibly be described as remittances, but was perceived by the respondents as savings. Again, questions like this run up against the difference between foreign concepts of individual wealth and more family/communal understandings of assets and wealth that is common in rural communities in Myanmar.

Focus group participants reported that their remittances were often used to pay for family expenses and to fund their younger siblings' education.

Figure 38: Do You Remit Money to Your Family in a Normal Month?
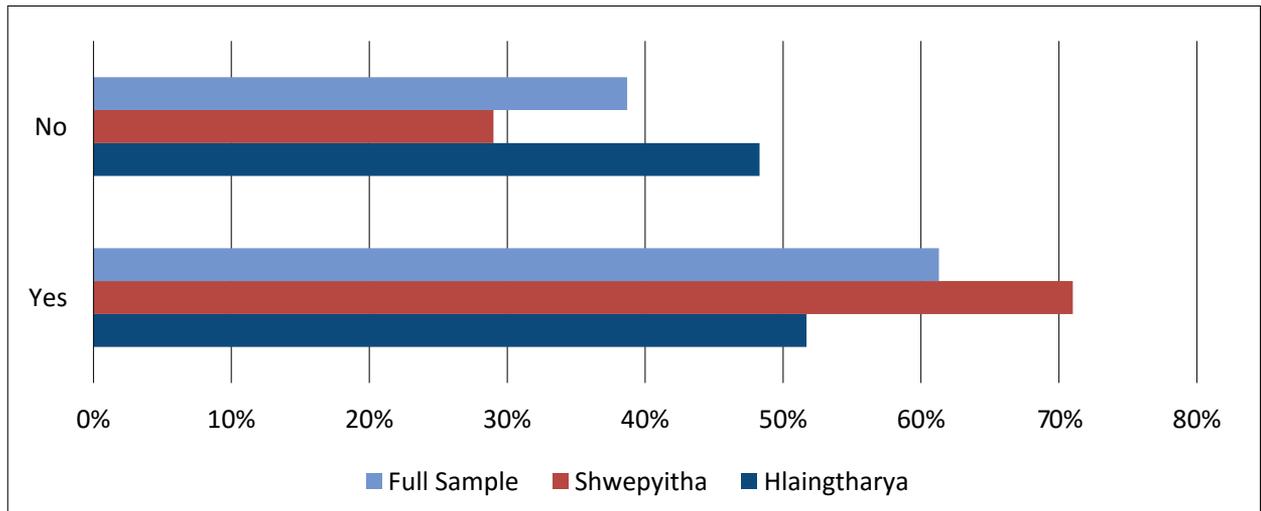
61% of respondents remit money back to their family and the proportions are notably higher in Shwepyitha (71%) than in Hlaingtharya (52%) a further indication that the latter township's respondents are more established and live with more of their family, which takes up more of their income. Of those who do remit money, almost half (48%, Figure 39) send money monthly. Another 15% send money every other month, while almost 35% send money more haphazardly reporting that they would send one to five times a year. Almost all reported sending more than MMK 25,000 each time.[8] The qualitative work found that rather than utilizing banks or other systems to send money back to their village of origin, it was common for a family member to come to Yangon to collect the remittances on a regular basis.

Figure 39: If You Remit Money, How Often Do You Do So?

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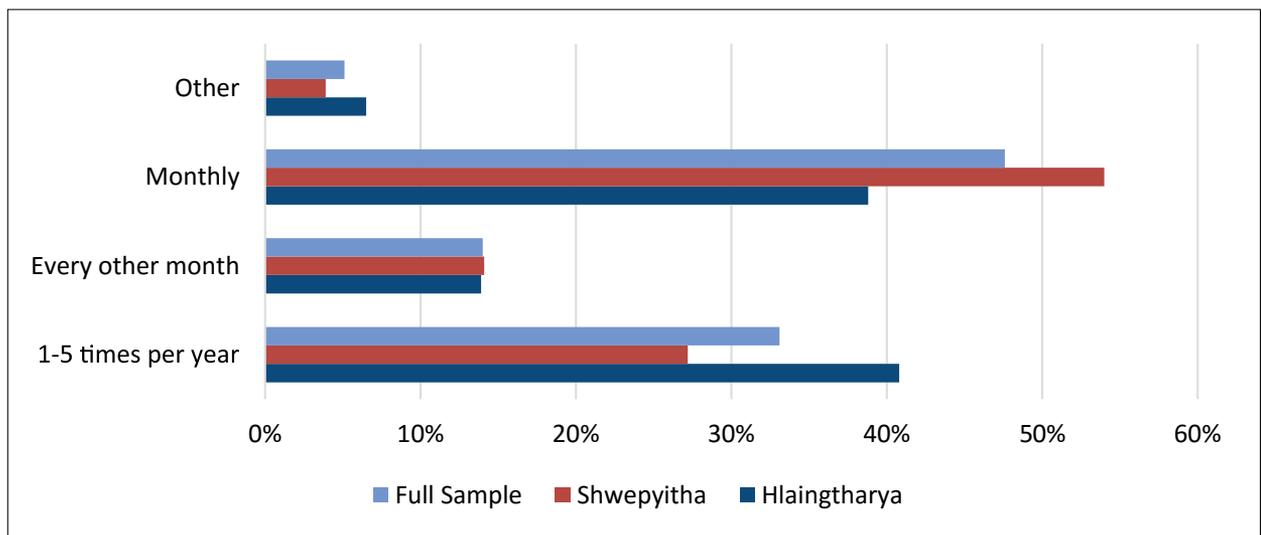
[8] The brackets of this question were incorrectly placed. Further investigation into how much garment sector workers remit and how they calculate the amount they wish to send is recommended.

Figure 40: Percentage of Who Remit Regularly, by Age
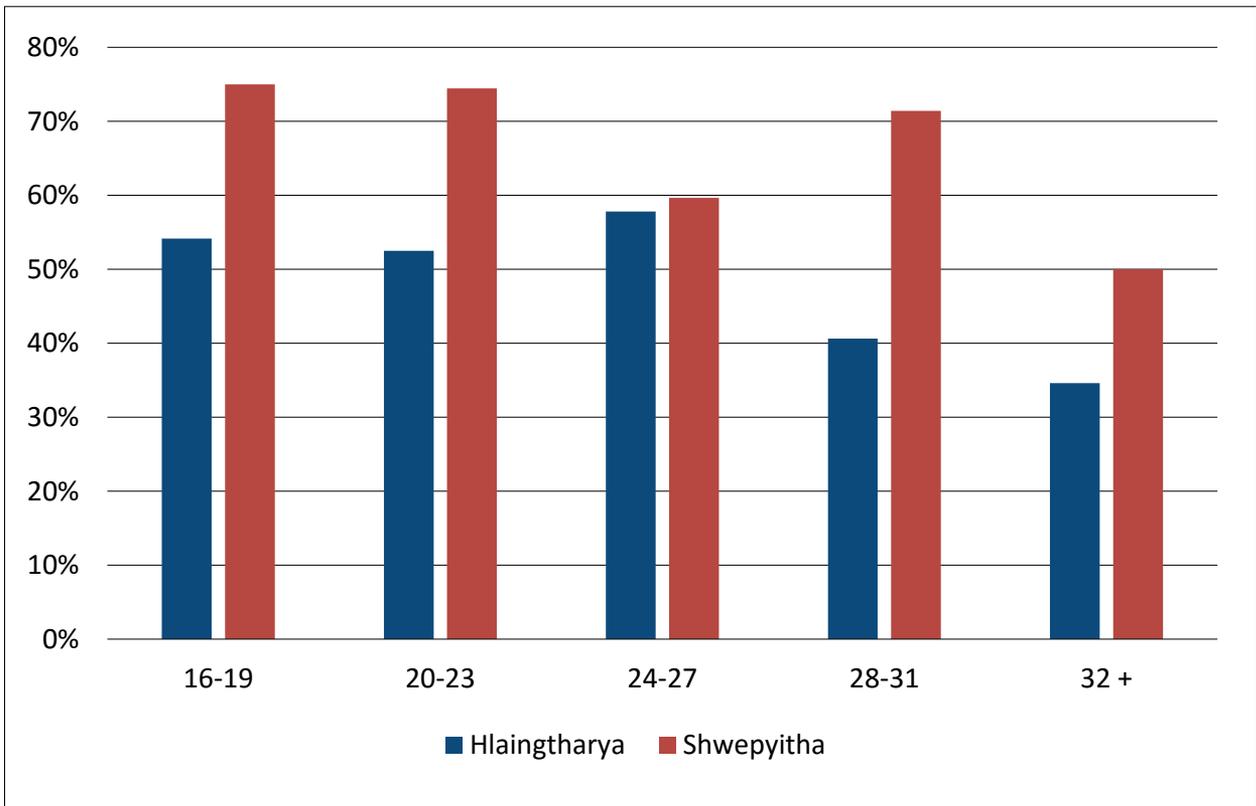
Figure 41: Percentage of Who Save Regularly, by Age
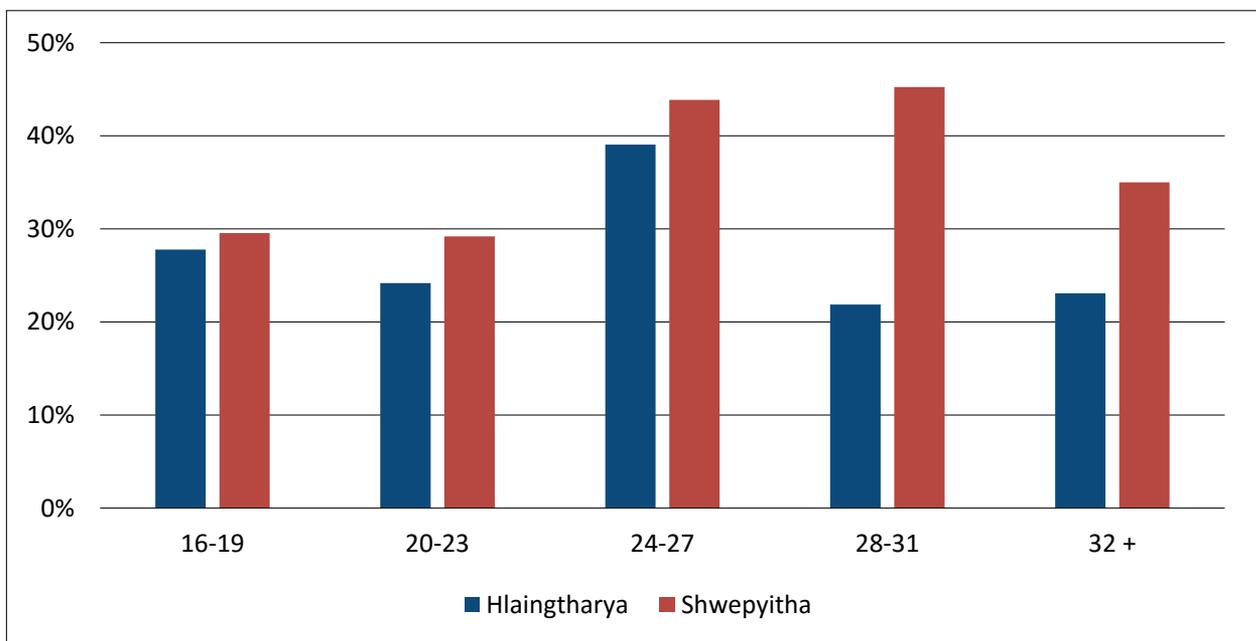
Further analysis of savings and remittances by age reveals an interesting trend where for younger workers (i.e. under 23) remittance levels are high while savings rates are low. Between 23 and 27, the proportion who save money regularly goes up as remittance levels tail off. Above that, both savings and remittance rates drop significantly. This phenomenon is shown in Figure 40 and Figure 41, and suggests that at a young age, workers are primarily focused on supporting the family back home. However, when they reach their mid-20s they have more autonomy, perhaps having been joined by another family member, or perhaps have begun to plan for marriage themselves, and are saving more and remitting less. Finally, in their late 20s and 30s they are more likely to have their own families to support, so both saving and remittance levels decline. Cross referencing based on 'time in township' finds that among workers who had lived in their current township for less than four years, 69% remitted money in normal months, but this fell to just 38.5% among those who had lived in the township for more than four years; thus, adding additional evidence to the suggestion that remittances levels fall as people become more firmly established in Yangon. However, further analysis would be required, but this data could assist in identifying what age groups are most suitable for savings programs targeting vs. other efforts to reduce costs of remittances or other programs.

Respondents were asked about their debt in an effort to try and understand what proportion of borrowed money came from (relatively) formal sources and how common was it for workers to face debt levels that went well beyond their ability to repay. The way the question was asked and understood in Burmese is significant as debt refers specifically to money borrowed from a money lender or similar individuals or organizations, who seek a return on their loan. The smaller day-to day or week-to-week loans, generally MMK 20,000 or less, which are borrowed from friends and family and are frequently without interest, were not included. While such borrowing is considered debt, workers described it as 'debt without pressure' and it did not factor into their concerns compared to loans taken from money lenders that includes interest.

66% of respondents reported having no debt and once again there are clear differences between Hlaingtharya where only 55% were debt free and Shwepyitha where 76% had no debt. Of the 34% who did have debt, those with the highest debt levels were clustered in Hlaingtharya (Figure 42).

Figure 42: Levels of Debt
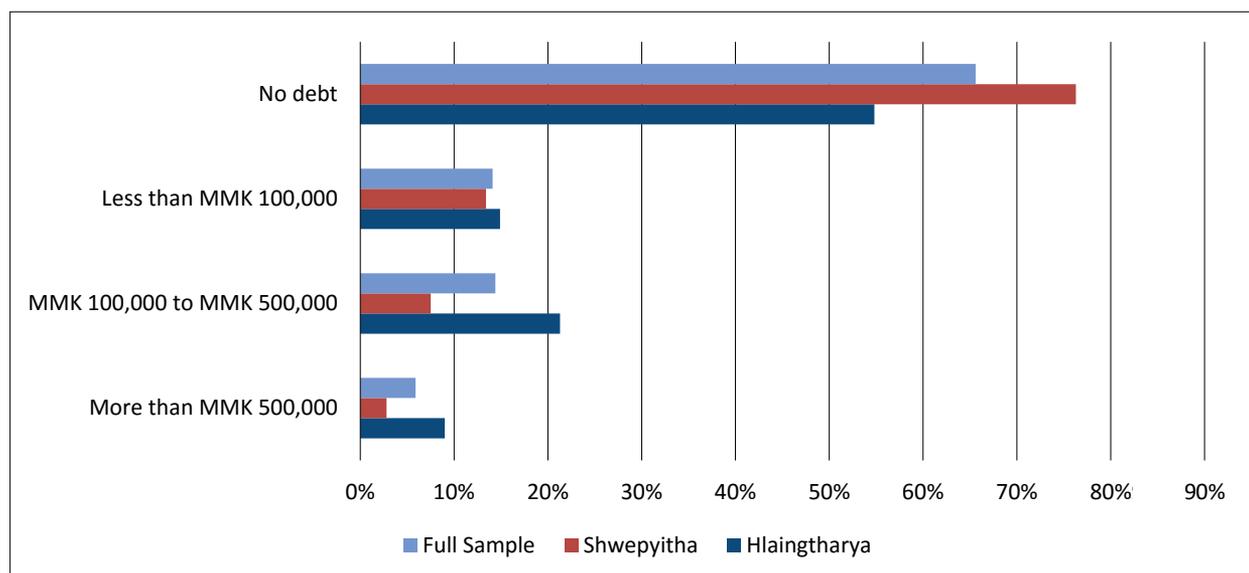
Evidence from the focus group suggests that while the data above is accurate (and few FGD participants reported major debt), it may also be incomplete, and that the small-scale debt respondents left out is an important part of their monthly financial calculations. Debt was portrayed as a regular part of their lives but not a massive problem as most of the time debts can be repaid once their salaries have been received. Borrowing is not a difficult experience, and FGDs reported examples of borrowing from friends, family, supervisors at work, and others, with participants saying that frequently they were able to borrow with no interest. Such recurring and regular debt for these workers was not viewed as an existential problem, rather it was seen as a financial tool to assist with cash flow between pay checks, and even those who had savings reported borrowing.

CHAPTER 6:
TECHNOLOGY ENGAGEMENT FINDINGS

Engagement with technology among Yangon's garment sector workers is widespread but limited in depth. A vast majority have access to smart phone technology and use their phones multiple times each day, primarily for communication and entertainment. While phone access is common, exposure to the internet beyond social media is limited indeed their understanding of the broader internet is almost non-existent, instead phone use is filtered through two ubiquitous apps: Facebook and Viber.

Monthly spending on mobile connectivity is low, but represent a meaningful proportion of many workers' incomes and respondents appeared to be relatively discerning mobile consumers. A surprisingly high 39% have two SIM cards, often used for different purposes, and both enumerator feedback and focus group discussions highlighted that users were aware what network had better deals or offered free in-network calling or SMS. In sum, garment workers tend to be frequent phone users and are aware of how to get the most out of their limited resources, but the depth of engagement is limited to a handful of platforms.

PHONE OWNERSHIP AND SPENDING
When asked about phone ownership, 83% of respondents confirmed that they owned a smart phone[9] while a further 2% owned a 'bar' phone. Qualitative focus groups had similar findings, with over half of the participants having smart phones and those without were planning to buy one in the near future. However, no one used other forms of technology (tablets, laptops, computers). Smartphones tended be bought either by parents or the workers themselves and the most important qualities cited was that it was cheap, strong, and easy to get parts for if it had to be fixed. Workers valued their phones and saw them as permanent items to be held for a long time and repaired as necessary.

Monthly spending on credit tended to be quite low, with half of respondents spending between MMK 1,000 and MMK 5,000, though another 35% spent between MMK 5,000 and MMK 10,000. There was some difference between the townships with Shwepyitha having a higher proportion (40%) in the MMK5,000 to MMK 10,000 range than Hlaingtharya (30%).

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[9] Defined as a phone capable of loading apps and accessing the internet.

Figure 43: How Much Do You Spend Each Month on Phone Credit?
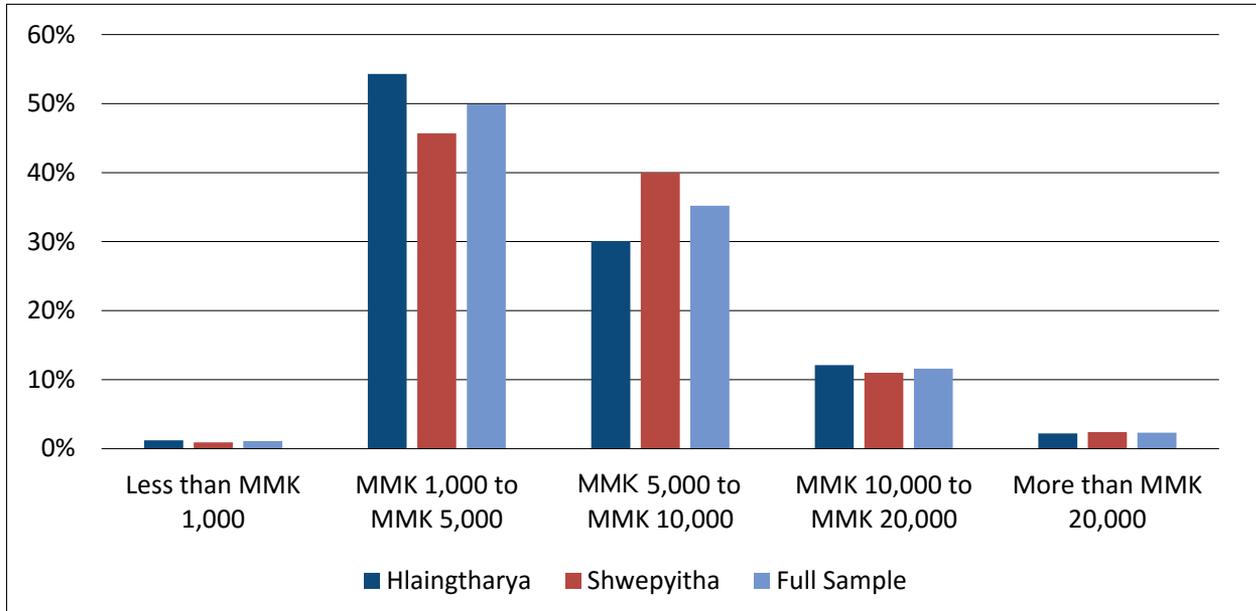
Of the three major mobile networks in Myanmar, MPT and Telenor are clearly preferred by garment sector workers, with 59% saying they use MPT and 66% Telenor compared to just 20% for Ooredoo (multiple answers were allowed, hence the total being over 100%). There were a variety of reasons cited in the focus groups and informal discussions for this discrepancy. Some were economic, in that MPT has a free Facebook mode that workers used to save money while others found Telenor's free calls offer within its network attractive. Others were access based, with some local phone shops having deals with MPT/Telenor and some workers reported the Ooredoo signal was poor in their wards. In focus groups, of those who explained their motivation for using certain networks, several reported that they would not use Ooredoo because it was a foreign, Muslim-owned company (respondents generally used the derogatory term 'kalar'). Such sentiments were also expressed regularly by respondents to the enumerators during the survey.

Figure 44: What Mobile Network Do You Use?
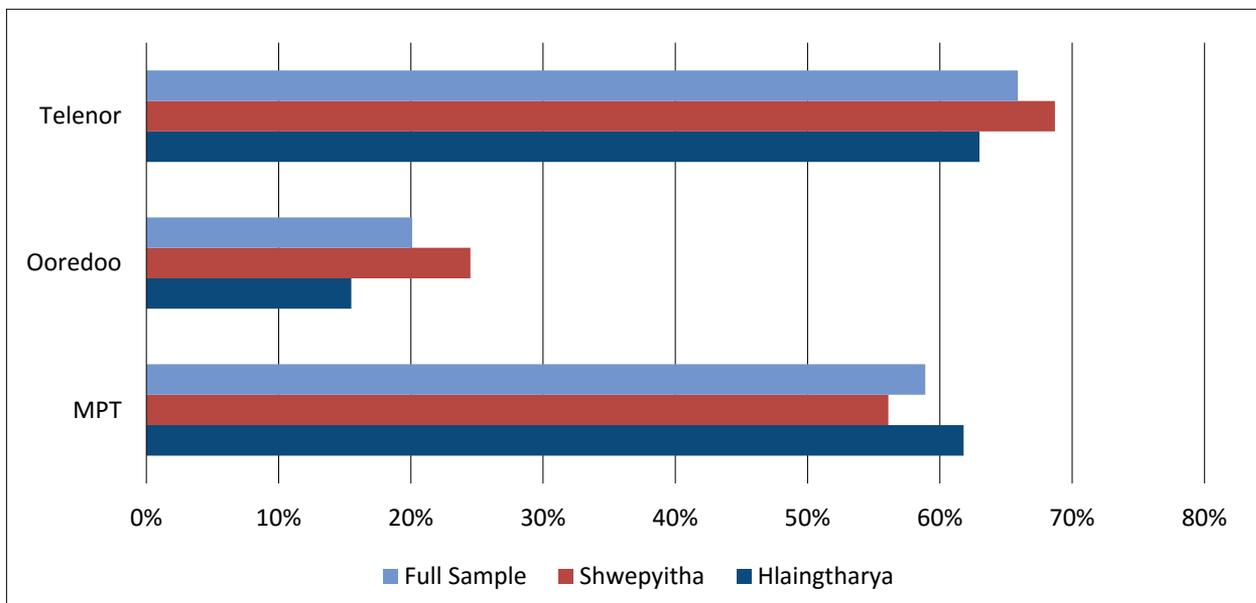
A full 39% reported having and using two SIM cards, a reflection of both the relative savviness of garment workers as mobile consumers (able to access best deals from multiple networks) and the ubiquity of inexpensive dual SIM card Android smartphones.

Figure 45: Do You Always Have 3G Data Turned On?
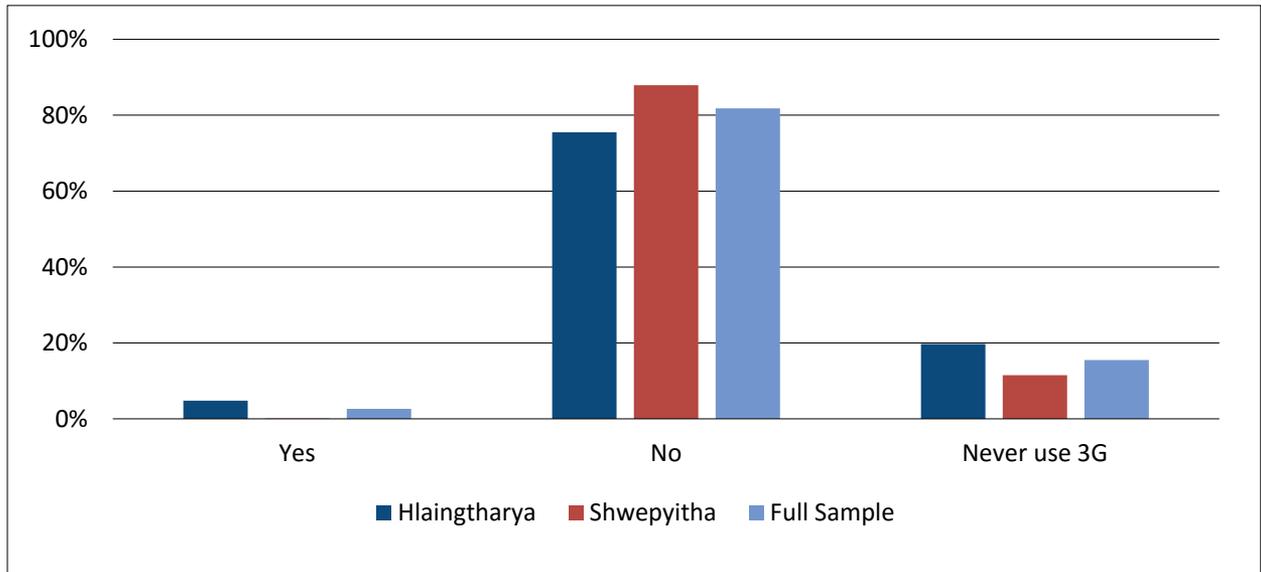
Figure 46: If Not, How Much Time per Day Do You Have 3G Turned On?
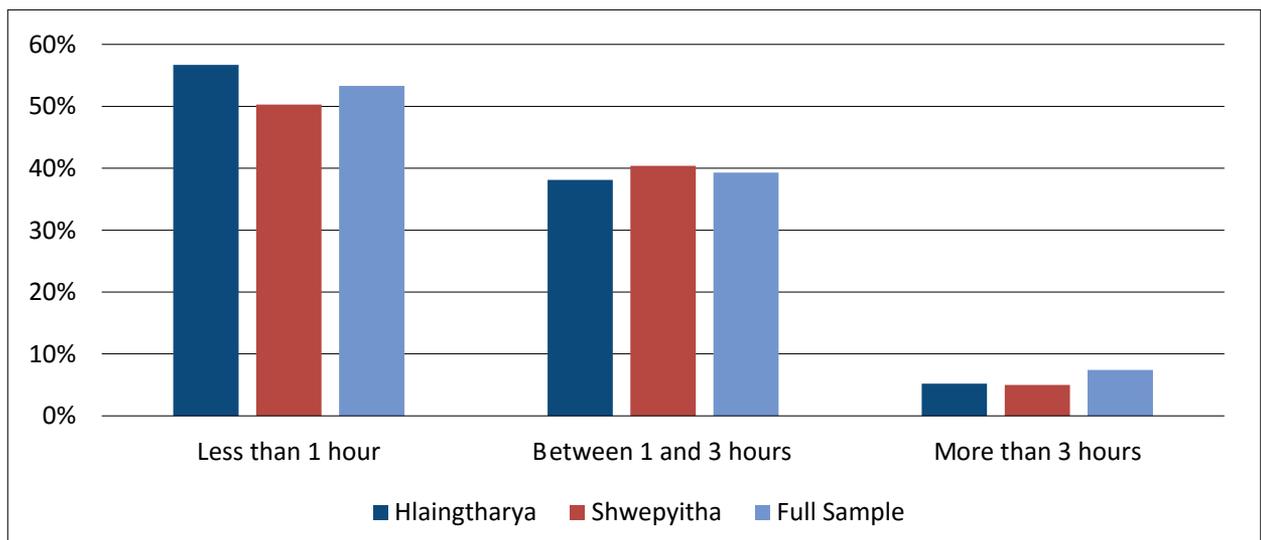
The expense of 3G means that most workers avoid turning it on until they are ready to update Facebook or send a message through an app. 88% of respondents reported that they would generally not have their 3G on, while 16% reported that they never turned it on out off a fear it would rapidly use up their credit. Of those who reported sometimes using their 3G, 53% reported using it for less than one hour per day while another 39% said they used it between one and three hours each day. It should be noted that the focus groups reported that most factories have strict rules on telephone use, with some removing the phones from workers and only returning them at lunch and at the end of the day. Also, younger workers appear more likely to use their 3G more each day, as shown in Figure 47.

Figure 47: Time with 3G on per Day, by Age Group
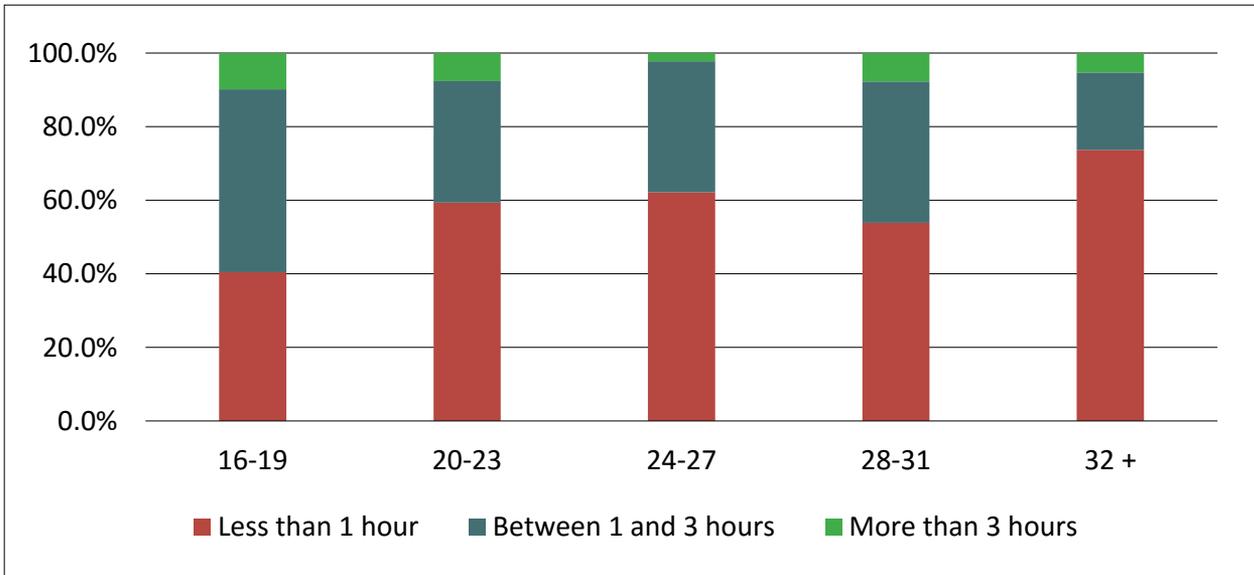
APPS & SOCIAL MEDIA

Viber is even more ubiquitous than Facebook, with 91% of smartphone owners saying they had the app on their phone (Figure 48). It offers inexpensive data-based calling with a good chatting function (i.e. 'stickers' and emoji's), and there was one instance of Viber being used as part of work. Two clerks said their factory used Viber to provide updated information on production levels, while another uses their phone to recruit potential workers to her factory and she receives a bonus if those recruits do well.

The only app that does not appear on the list below is Zapya: a function that allows phone users to exchange music and game content via Bluetooth, which means there are no additional costs.

Figure 48: Percentage of Respondents with Popular Apps
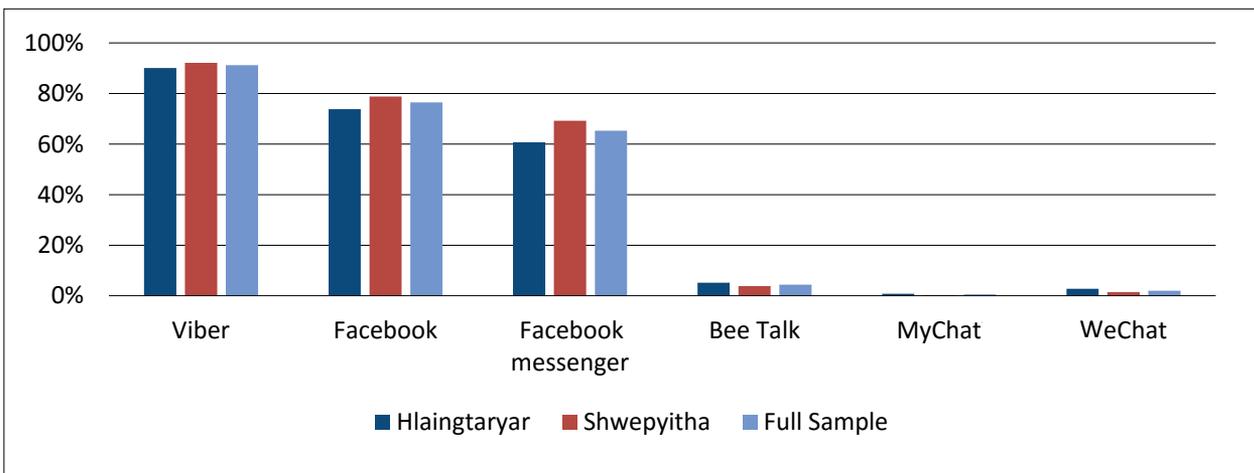
Figure 49: Do You Have a Facebook Account?
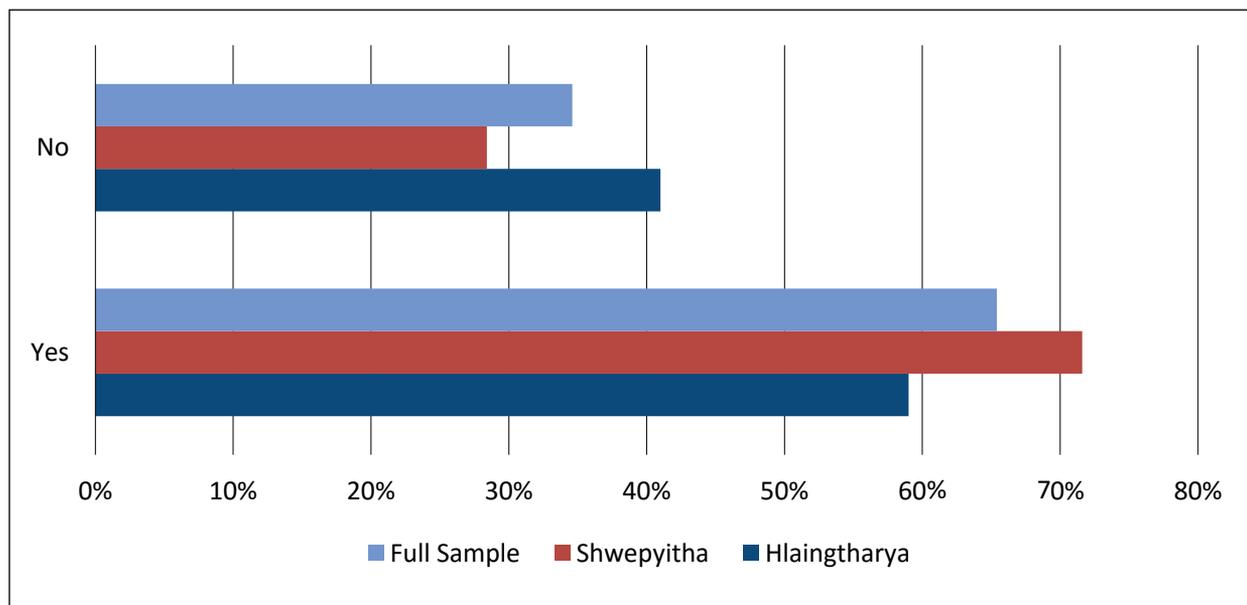
In terms of accessing Facebook, 65% of garment sector workers reported having a Facebook account. There was a notable difference between townships, with the less established Shwepyitha having usage rate of 72% compared to Hlaingtharya's 59%. Once they have an account, people tend to use it daily, with 55% of those on Facebook using it up to one hour per day and another 30% saying they use it one to two hours each day. While Facebook was reported as primarily used for entertainment, a small handful of workers reported using it to look up dress patterns and learning about sewing machines. It is notable that focus groups reported using Facebook as the primary source of news and information, but that they generally did not trust the information received online unless it was accompanied by photographic or video evidence.

Table 3 shows the frequency respondents used their phones for certain activities while Figure 50 ranks the most frequent activities (i.e. those done at least once per day). It is clear that basic communication (i.e. phone calls) and entertainment are the two most common activities, with 70% using their phone to listen to music every day and 56% making phone calls. Conversely, just 12% use their phone to find information on new jobs, although this number is perhaps not as low as might be expected given the general hesitancy to rely on the internet for job searches (see chapter on employment context above) or from fear of using too much 3G.

Table 3: Frequency of Certain Phone Usage Activities

	Phone Calls	SMS	Social chat	Looking for information on personal interests	Looking for information on my job or a new job	Playing games	Taking photos/ videos	Watch movie	Listening to music/ radio
Many times, every day	20.9%	5.3%	19.9%	7.9%	5.2%	9.0%	18.9%	24.2%	42.8%
Once or twice, every day	43.5%	9.0%	28.9%	15.7%	7.0%	7.8%	15.8%	25.4%	26.8%
Once, most days	12.3%	3.2%	12.8%	7.9%	3.0%	5.9%	6.4%	17.5%	11.3%
Once or twice a week	18.0%	8.8%	9.3%	8.1%	4.9%	7.0%	35.6%	16.4%	8.1%
Rarely	4.3%	34.2%	7.9%	11.1%	12.2%	10.2%	14.9%	5.5%	6.5%
Never	1.1%	39.4%	21.2%	49.3%	67.7%	60.1%	8.4%	11.0%	4.6%

Figure 50: Percentage of Respondents Using Their Phone for Specific Activities Every Day
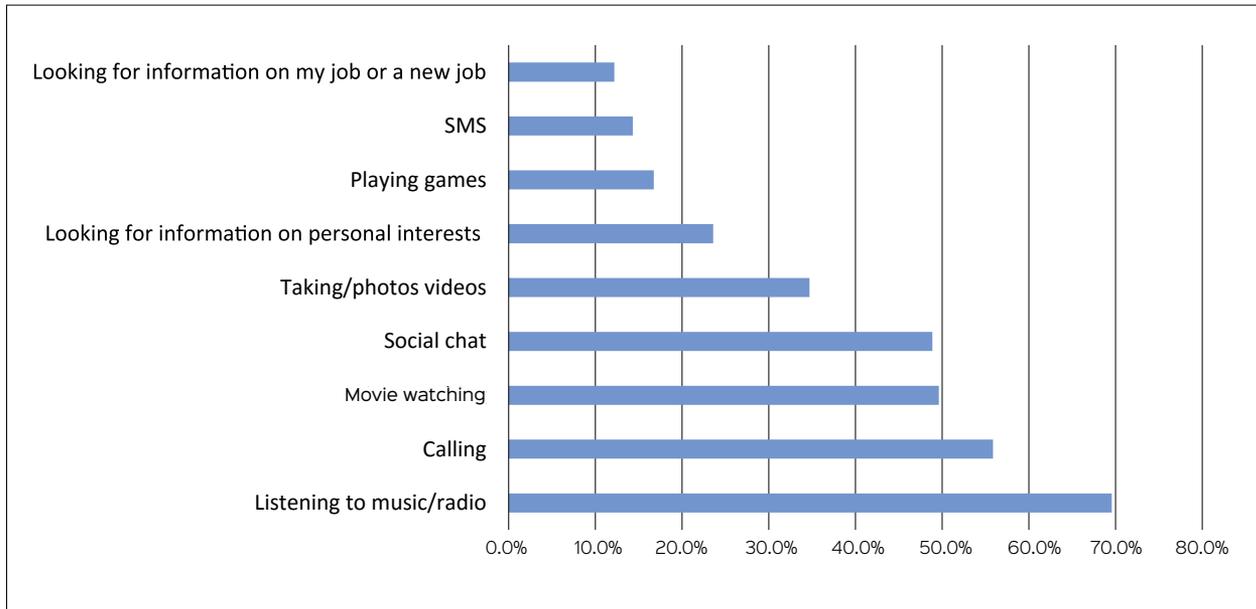
CHAPTER 7:
CONCLUSIONS

The previous findings chapters provided a detailed analysis of each segment of the research and sought to provide a knowledge foundation for the sector, while adding explanatory understanding to these results. This chapter provides a summary of the survey results and conclusions that can be drawn directly from the data.

To help digest the data, this chapter is split into two types of conclusions. First, a paragraph (in italics) uses the data to describe a typical garment sector worker, and her existence working in a factory and living in one of Yangon's outer townships. Second, there are bullet-pointed lists that provide specific conclusions drawing directly on the data.

WORKFORCE DEMOGRAPHICS
The prototypical Yangon garment sector worker is a young woman between the ages of 19 and 21, who has migrated to Yangon within the last two years. She is ethnically Bamar, speaks Burmese as her first language, and can read and right at a basic level having completed grade five. She is from Ayeyarwaddy Region, though many of her friends are from Bago and Rakhine. She is unmarried and lives with several friends/colleagues and one other family member, her older cousin.

Analysis of the data for workforce demographics results are presented in the following conclusions:

- Gender and age: With over 94% of the garment sector workforce being women and 60% between the ages of 18 and 23, it is clear that the garment sector workforce is dominated by young women for whom this may be their first non-family labour job.

- With the exception of a notable Rakhine minority, the workforce is not particularly ethnically diverse, as 75% of workers are Bamar. However, there is significant regional diversity, with at least 10% of workers coming from five different states and regions. 80% speak Burmese as their first language.

- While few are well-educated, a plurality has some middle school education, demonstrating the almost universal presence of primary schools in Myanmar villages — and the rapid drop off in access to schools for rural children in their early teens.

- Over 75% are single, illustrating the youth of the labour force, contrasted with their peers at home who would likely be married by their early 20s; it also shows both the independence and lack of family stability facing young women working in the sector. Additionally, of those who were married, just 38% have children.

- 68% have moved to their current township within the past four years, and half of those arrived within the last 12 months.

- While a plurality does not live with any family members, many workers do live with small number of relatives (one to three people).

EMPLOYMENT CONTEXT

This worker is employed by a foreign-owned factory as a sewer. She joined the factory because it offered a decent regular salary for work that was neither physically demanding nor an unpleasant place to spend her days. Her workweek six days, with her only day off on Sundays. She has been working in this factory for almost one year and if she were to quit, it would be to find a factory with better base pay. She has an ID card but no letter confirming her position and no copy of contract.

Though she perceives her position as a good job and better than most of the other options, life in the factory is not without its challenges. These include the limited breaks, and the frequent scolding's from her seniors and line supervisors. She feels that this occasionally reaches verbal abuse, but she has not experienced any physical or sexual violence. She is concerned, however, that there is no way for her to complain to senior management if something were to happen.

She got her job through a friend from the same village who had migrated a year earlier and, now that she has her own network, would plan to find a future job through her Yangon friends. For her, the base pay is the most important aspect of a possible new job, though having good managers is also important. It is easy to get a job and if she can demonstrate her ability in the skills test, she will be rapidly employed at any factory. However, for now, she is happy with her current job and is not seeking to leave.

She has heard of unions and thinks that they represent workers in negotiations with management, but does not know much more than that about them. There are none in her factory, and she has only heard some of the more senior employees talking about them. She is not a union member and is not sure that she wants to be one. Nevertheless, she votes, along with the rest of her line, for in-factory representatives who negotiate with the ownership on any problems the workers may have.

The following conclusions are drawn from the survey's employment context questions:

■ Some 90% of garment workers are employed by foreign-owned companies.

■ Most workers (60%) sew as their job in the factory, and no other specific job occupies more than 10% of the workforce. Men employed in the sector are more likely to be engaged in cutting or peripheral jobs like security guard or mechanic.

■ Time in service with their current factory was evenly distributed between those workers who are recent hires and those with more experience. Those who have worked at the same factory represent a slight plurality (31%) working for the same factory for between one and three years.

■ Most workers (90%) reported working 8-10 hours per day.

■ For a slight majority of workers (57%) their current position is their first job in the garment sector.

■ For those with previous sector experience, the most frequently cited reason they left their previous job was bad pay, with 36% reporting this as the main reason.

■ Most workers (87%) have an ID card, which is their main written proof of employment.

■ Verbal abuse is common across the sector, with 39% of workers saying that they had either experienced it themselves or witnessed instances.

■ Other forms of abuse, namely physical abuse and sexual violence, were asked about, but were much less common, and instances (either experienced or witnessed) were reported by 5.4% and 1.5% respectively. There are risks, however, of under-reporting given the generalist nature

of the survey. See the detailed examination of associated issues in Chapter 2.

- Formal grievance or complaints systems are uncommon, with only 33% of workers reporting that they knew of such a system in their factory.

- Job searches are conducted primarily through personal networks: 49% reported a friend helped them find their current job while 32% found their position through a family member. When asked how they would find a job in the future, 64% said that through a friend was the best way. No one endorsed paying an agent as the best way.

- Asked about important characteristics of a new job, a majority prioritized base pay as the most important (67%), with good management being the most common answer for the second most important (25%), however, the answers were much more distributed. Beyond these two characteristics, workers did not have major priorities: 18% had no opinion on a second important characteristic and 58% had no opinion on a third.

- Workers were split on the question of what would be their preferred next job. The most common answers indicated a dichotomy between those who liked their job and did not want to leave (36%) and those who wanted to leave the sector entirely (40%). Smaller yet notable, minorities seek more senior positions at their current factory or a new position in the garment sector (13% and 11%, respectively).

- Across the sample, engagement with labour unions was limited. Only 54% had heard of unions at all, and of those only 35% reported that unions were definitely active in their factory (a further 16% were unsure). Understanding of what unions did was also mixed, with a majority (56%) saying they did not know. Those who were aware of union activity in their factory generally reported that co-workers or senior colleagues had informed them. Finally, just 15% of respondents who (1) had heard of unions, and (2) knew that there were unions in the factory, were members — or just 22 out of the full 778-person sample — and only 42% said that they would want to become a union member.

FINANCE AND SAVINGS

The prototypical worker's salary is paid monthly at the beginning of the month and is calculated using her base salary plus overtime and any bonuses she may be eligible for. Workers can get bonuses for attendance, punctuality, and skills. While the envelope of cash that she receives comes with a pay slip explaining how it was calculated, it is confusing and frequently she does not fully understand all the parts of her salary. Over the last six months her base salary has not changed, and only one or two of her friends have seen theirs go up.

She almost always works overtime and though she does have the ability to say no, she worries that if she refuses too often it will compromise her relationship with her supervisor (and consequently her monthly bonuses) or even lead to her being fired. Also, because her base salary is so low, she normally wants to work overtime; it is an important contributor to her salary as she normally gets between MMK 25,000 and MMK 50,000 in overtime pay alone. Her bonuses are more variable and in smaller amounts, and are rarely more than MMK 25,000 each month.

As she lives away from her parents and extended family, she makes her own financial decisions. Her first priority is paying for her housing, which accounts for a large proportion of her income, and she pays between MMK 30,000 and MMK 60,000 each month, though it has gone up recently. Most months, once she accounts for housing, food, and other necessary expenses, the money that remains is sent back to her family.

Occasionally she is able to save some for herself (and when she does she stores cash by hiding it or giving it to her landlord for safekeeping), but this is rare as the money she remits every month is very important to her family, so that is prioritized. Her friends who are a little older tend to save more and she hopes to be able to copy them in the coming years. While her salary is never high enough and she often has to take out small loans from senior colleagues or friends toward the end of the month, she does not have any substantial debts that she has to pay interest on.

The following conclusions are drawn from questions on salary, savings, and remittances.

- Workers were asked how their salaries were calculated and 68% reported they received base pay plus overtime, rather than other models (such as payment per piece).

- Salaries remain relatively constant, with just 27% reporting any change in the last six months. Of those who had experienced changes in salary, the change was positive with an almost even split between those whose salaries had gone up by less than MMK 25,000 (50%), and those who are now receiving an additional MMK 50,000 or more (43%).

- Almost all workers have regularly assigned overtime, and a majority (54%) said they could choose whether to work it or not; although discussions of implicit pressure were common. However, 30% said it was required in their factory.

- As a result, overtime pay is ubiquitous and the amounts are significant given the low base pay. 41% of respondents reported receiving between MMK 25,000 and MMK 50,000 each month and another 35% said they generally got more than MMK 50,000 in overtime.

- Bonus pay, normally received for attendance and punctuality but also in the form of skills bonus or 'time of service' awards, was also common with 72% saying that at the very least they sometimes received bonuses. The amounts tended to be less than those associated with overtime, with a 79% receiving less than MMK 25,000.

- Most (65%) workers make their own financial decisions.

- A plurality of workers (45%) spend between MMK 30,000 and MMK 60,000 on housing each month. Accommodation is becoming more expensive with 73% reporting that housing costs had increased in the past year.

- Only a minority of workers (31%) are able to save in normal months, and for those that do they tend to store cash or buy goods, such as gold, that can be rapidly turned into cash if needed.

- A much higher proportion (61%) remit money to their families on a regular basis, with most sending money each month.

- Formal debt is relatively uncommon, with 66% of workers reporting that they did not have loans with money lenders or other formal sources. As discussed in Chapter 5, this does not include small amounts borrowed from friends or co-workers.

ENGAGEMENT WITH TECHNOLOGY

Finally, she owns a smartphone, one that she bought herself after seeing all her new Yangon friends using theirs. She also wanted to be able to easily speak to her family on a regular basis. Each month she spends about MMK 5,000 on credit, divided between the two SIM cards she has — one from Telenor and one from MPT. She uses the MPT one to check Facebook as it has a free mode on their network, while Telenor's special offers allow her to call her parents (also Telenor users) without using too much credit. All her friends use either Telenor or MPT and a lot of them also have two SIM cards.

Because she cannot afford to spend more on credit, she is very concerned about the cost of 3G and only turns it on occasionally to download messages from Viber or Facebook updates. Generally, she has 3G on for about an hour, but on days off this sometimes amounts to two or three hours. Her and most of her friends have Facebook accounts and everyone with a smartphone has Viber; other apps on her phone were pre-loaded by the phone store but she does not tend to use them. As her factory prohibits phone use, except at lunch breaks, she only uses it in the evening. Most of her time spent on her phone is calling her parents and friends back home, chatting on social media, or watching movies and listening to music shared by co-workers.

The following are specific conclusions drawn from questions on workers' engagement with technology:

- Most workers have a smartphone (83%).

- Half of all workers spend between MMK 1,000 and MMK 5,000 per month on phone credit; another 35% spend between MMK 5,000 and MMK 10,000.

- Telenor and MPT are the most commonly used networks at 66% and 59% respectively, and Ooredoo falls well behind at 20% (respondents could select multiple networks, and 29% have at least two SIM cards).

- Due to concerns over cost, workers generally keep their 3G off, only updating apps occasionally (16% never use 3G). 53% of workers use 3G less than one hour per day, and an additional 39% use it between one and three hours per day.

- 65% of workers have a Facebook account and of those, 55% use Facebook less than one hour per day and 30% one to two hours each day.

- The most commonly found app is Viber (91% have it on their phone) followed by Facebook (77%) and Facebook Messenger (65%). No other app was found on more than 4% of phones.

- Listening to music is the most commonly used activity for the phones, with 70% saying that they use their phone for this every day. 55% make calls every day, and 50% use their phones for social messaging (Viber or Messenger).

ANNEX

ANNEX A:
WORKS CITED & OTHER RESEARCH

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ANNEX B:
SURVEY TOOL & CONSENT STATEMENT

Hello and good day. I am working with Enlightened Myanmar Research Foundation, a local NGO, to implement a survey on behalf of C&A Foundation, a privately funded international NGO. C&A Foundation works around the world to improve the lives and working conditions of garment factory workers. EMReF is a local NGO that implements social research projects for education and development partners.

This survey is part of a research project to better understand who garment sector workers are, their working lives, the challenges they face and how they engage with technology. The survey you see here is only to record your answers; your individual responses will not be sent to anyone else or anyone at another organization. The information we collect will be used to develop programs to assist garment sector workers. We cannot promise that these programs will affect you directly, but they will work to improve the lives of garment sector workers across Yangon.

We are interested to hear all your opinions, both positive and negative. You can choose not to participate in this survey if you don't want, and you can choose not to answer questions or to stop the survey at any time. If you choose not to participate, it will not affect your relationship with C&A Foundation, with EMReF or any of us. Everything you say in this survey is private and we will not write down your name, NRC number or any other personal identifying details. Everything is confidential.

Enumerator: Confirm you have received verbal consent from the participant by ticking this box:

Section A: Interview Details
To be completed by the enumerator

A1	Enumerator Code		
A2	Interview Number		
A3	Interview date		
A4	Interview township	☐ Hlaing Tharyar	☐ Shwepyithar (tbc)
A5	Interview Ward		
A6	Start time/end time		
A7	Notes		

Section B: Demographics
To be completed by the enumerator

B1	Interviewee ID			
B2	Age			
B3	Gender	Male	1	
		Female	2	
B4	Ethnicity			
B5	Religion	Buddhist	1	
		Christian	2	
		Islam	3	
		Hindu	4	
		Other (Specify)	96	
B6	State/Region of birth?			
B7	Township of birth?			
B8	Township where live now?	Shwe Pyi Thar	1	
		Hlaing Thar Yar	2	
		Other (Specify)	96	
B9	Ward where live now			
B10	How long have you lived in Yangon/this township?			
B11	Highest level of education?	Grade Level (1-11)		
		University Level	12	
		Graduate Level	13	
B12	What age did you start working in garment a factory?			
B13	Married?	Single	1	Go to B16
		Married	2	
		Divorced	3	
		Other (Specify)	96	
B14	Do you have children?	Yes	1	
		No	2	Go to B16
B15	How many children in Yangon?			
B16	How many relatives do you live with?			If '0', then go to B19
B17	Do the relative that you live with depend only on your income for support?	Yes	1	Go to B19.
		No	2	
B18	If No, how many relatives are wage earners			
B19	Where do you live	Worker hostel (private and Government)		
		Owned House	2	
		Rented House	3	
		Owned apartment	4	
		Rented Apartment	5	
		Relative's house	6	
		Other (Specify)	96	
B20	What is your first language? (Open ended)			
B21	What other languages do you speak?			
B22	Can you read and write in Burmese? (Single answer)	Read	1	
		Write	2	
		Both	3	

C10	Do you normally receive overtime pay each month?	Yes, all the time	1	Go to C12.
		Yes, sometimes	2	
		No	3	
C11	How much do you normally receive in overtime pay?	Less than 10,000MMK	1	
		Between 10,000MMK and 25,000MMK	2	
		Between 25,000MMK and 50,000MMK	3	
		More than 50,000MMK	4	
C12	Do you normally receive bonuses each month?	Yes, all the time	1	
		Yes, sometimes	2	
		No	3	Go to C14.
C13	How much do you normally receive in bonuses?	Less than 10,000MMK	1	
		Between 10,000MMK and 25,000MMK	2	
		Between 25,000MMK and 50,000MMK	3	
		More than 50,000MMK	4	
C14	Is this your first job in the garment sector?	Yes	1	
		No	2	Go to C16
C15	If no, why did you leave your other garment sector job? Check all that apply	Bad pay	1	
		Bad senior management	2	
		Bad line management	3	
		Long hours	4	
		Far away	5	
		Difficult co-workers	6	
		Fired	7	
		Other 1	96	
		Other 2	96	
C16	How did you find your current job? (single answer)	Someone you paid	1	
		Through a friend	2	
		Through a family member	3	
		Through someone on the internet (Facebook, Viber etc.)	4	
		Through the worker's hostel or residence manager	5	
		Training school	6	
		Vacancy announcement poster	7	
		Other: if so, please state	96	
C17	If you wanted to change jobs now, what do you thinks is the best way to find a new garment sector job? (Single answer)	Someone you paid	1	
		Through a friend	2	
		Through a family member	3	
		Through someone on the internet (Facebook, Viber etc.)	4	
		Through the worker's hostel or residence manager	5	
		Training school	6	
		Vacancy announcement poster	7	
		Other: if so, please state	96	

C18	If you were looking for a new job at a garment factory, what would be the most important characteristic? (Single answer)	The hours you work	1	
		The base pay	2	
		The potential for bonuses/overtime	3	
		The location	4	
		Working with friends/people you like	5	
		Managers who are helpful and friendly	6	
		Pride in the company	7	
		Other: if so, please state	96	
C19	If you were looking for a new job at a garment factory, what would be the second most important characteristic? (Single)	The hours you worked	1	
		The base pay	2	
		The potential for bonuses/overtime	3	
		The location	4	
		Working with friends/people you like	5	
		Managers who are helpful and friendly	6	
		Pride in the company	7	
		No opinion	8	Go to C21
		Other: if so, please state	96	
C20	If you were looking for a new job at a garment factory, what would be the third most important characteristic? (Single answer)i	The hours you worked	1	
		The base pay	2	
		The potential for bonuses/overtime	3	
		The location	4	
		Working with friends/people you like	5	
		Managers who are helpful and friendly	6	
		Pride in the company	7	
		No opinion	8	
		Other: if so, please state	96	
C21	What would be your preferred next job? (Single answer)	I am happy with my current job and don't want a different position	1	
		I would like to take a more senior role in my current factory	2	
		A position in another garments factory	3	
		A position in a different section of work	4	
		Other: if so, please state	96	
C22	Do you have a contract?	Yes	1	
		No	2	
		Do not know	95	Go to C24
C23	If yes, did you negotiate the contract with your employer?	Yes	1	
		No	2	

C24	Do you have written proof of your job?	No	1	
		Yes, ID card	2	
		Yes, letter of appointment	3	
		Yes, other (specify)	96	

Guidance note: The next 4 questions are on sensitive issues. Please introduce in a sensitive way.

C25	Have you or anyone you know experienced physical abuse from your supervisor, line manager or a senior in the factory?	Yes	1	
		No	2	Go to C28
		Prefer to not answer	3	
C26	If yes, did you seek help or assistance from someone?	Yes	1	
		No	2	Go to C28
C27	If yes, who do you go first for help or assistance?	Line Manager	1	
		Senior manager	2	
		Labour Union	3	
		Civil society group	4	
		Police	5	
		Ward administrator	6	
		International NGO	7	
		Other (specify)	96	
C28	Have you or anyone you know experienced verbal abuse from your supervisor, line manager or a senior in the factory?	Yes	1	
		No	2	Go to C31
		Prefer to not answer	3	
C29	If yes, did you seek help or assistance from someone?	Yes	1	
		No	2	Go to C31
C30	If yes, who do you go first for help or assistance?	Line Manager	1	
		Senior manager	2	
		Labour Union	3	
		Civil society group	4	
		Police	5	
		Ward administrator	6	
		International NGO	7	
		Other (specify)	96	
C31	Have you heard of instances of any kind of sexual violence (must be contextualized whilst asking) experienced by any of your colleagues in the factory?	Yes	1	
		No	2	
		Prefer to not answer	3	
C32	If yes, did you seek help or assistance from someone?	Yes	1	
		No	2	
C33	If yes, who do you go first for help or assistance?	Line Manager	1	
		Senior manager	2	
		Labour Union	3	
		Civil society group	4	
		Police	5	
		Ward administrator	6	
		International NGO	7	
		Other (specify)	96	

C34	Is there an internal complaint or grievance committee in your factory?	Yes	1	
		No	2	
		Do not know	95	
C35	Have you heard of a labour union?	Yes	1	
		No	2	Go to Sec D
C36	What do you understand as the purpose of a union? Guidance: select as many as apply	Protest to get more money for workers	1	
		Represent workers and their rights	2	
		Stand up to managers when they are treating workers badly	3	
		Socialize with other workers	4	
		Don't know	95	
		Other, if so, please state	96	
C37	Are there unions in your factory?	Yes	1	
		No	2	Go to C41
		Do not know	95	Go to Sec D
		No, but I attend their activities	3	
C38	If 37 yes, how did you hear about it?	Co-worker	1	
		Other workers in the garments industry	2	
		Family member	3	
		Union representative	4	
		Media (newspaper, radio)	5	
		Internet (including face book)	6	
		My seniors	7	
		Other	96	
C39	If 37 yes, are you a member of a union?	Yes	1	
		No	2	Go to C 41
C40	If 39 yes, how much time do you spend on union issues (going to meetings, talking about unions with friends, helping the union organization)	Less than 1 hour each month	1	
		Between 1 and 5 hours each month	2	Go to D1
		More than 5 hours each month	3	
C41	If 37 no, would you want to join a union if it was possible?	Yes	1	
		No	2	
		Don't know	3	

Section D: Expenses and savings

D1	How much do you spend on housing each month?	Less than 30,000MMK	1	
		Between 30,000 MMK and 60,000MMK	2	
		Between 60,000MMK and 90,000MMK	3	
		More than 90,000MMK	4	
D2	Has the cost of housing increased in the past year?	Yes	1	
		No, stayed the same	2	
		No, it has decreased	3	
		Don't know	95	
D3	Do you make decisions about all expenditures or does someone else decide how to spend money for your household?	Own decision	1	
		Father	2	
		Mother	3	
		Husband/Wife	4	
		Brother	5	
		Other, please state	96	
D4	Are you able to save money in a normal month?	Yes	1	
		No	2	Go to D6.
D5	If yes, how do you save? (select all that apply)	Bank account	1	
		Private savings group	2	
		NGO savings group	3	
		Buying goods (gold)	4	
		Storing cash	5	
		Cooperative Loan Committee	6	
		Other: if so, please state:	96	
D6	Do you send remittances to relatives from outside of Yangon?	Yes	1	
		No	2	Go to D9
D7	If yes, how often do you send remittance per year			
D8	If yes, how much do you send to your family each time?	Less than 5,000	1	
		Between 5,000 MMK and 10,000 MMK	2	
		Between 10,000 MMK and 25,000 MMK	3	
		More than 25,000	4	
D9	Do you currently have any debts?	Yes, more than 500,000 MMK	1	
		Yes, between 100,000 MMK and 500,000 MMK	2	
		Yes, less than 100,000 MMK	3	
		No	4	

Section E: Engagement with technology

E1	Do you own a mobile phone?	Yes, a 'bar' phone	1	
		Yes, a 'smart' phone	2	
		No	3	End Sec.
E2	If 40 is yes, how much credit do you buy in a normal month	Less than 1,000MMK	1	
		Between 1,000MMK and 5,000MMK	2	
		Between 5,000MMK and 10,000MMK	3	
		Between 10,000 and 20,000MMK	4	
		More than 20,000 MMK	5	
E3	If 40 is yes, what network do you use? (Boxes, check all that apply)	MPT	1	0
		Ooredoo	1	0
		Telenor	1	0
		MEC Tel	1	0

E4. How often do you use your phone to do the following: What do you use your phone for most?

Guidance: Tick one answer option for each usage purpose.

	Many times a day	One /two times every day	One time most days	Once or twice a week	Rarely	Never
Calling someone						
SMS						
Chatting on messaging Apps (Whatsapp, facebook, viber)						
Looking for information on personal interests						
Looking for information on my job or a new job						
Playing games						
Taking photos and videos						
Watching movies						
Listening to Music/radio						

E5	Do you have a facebook account?	Yes	1	
		No	2	
E6	If yes, how much time do you spend on facebook or facebook messenger?	Less than 1 hour each day	1	
		Between 1 and 2 hours each day	2	
		More than 2 hours each day	3	
E7	Do you always have the 3G data on?	Yes	1	
		No	2	Go to E9.
		I never use 3 G data	3	End sec.
E8	How much time do you spend using 3G data? *Guidance: How much time do you actually use 3G, not how much time do you have 3G turned on*	Less than 1 hour per day	1	
		Between 1 and 3 hours per day	2	
		More than 3 hours per day	3	

E9. If 40 is 'yes, smart phone,' put a check next to all the apps they have (Yes=1, No=2)

Viber	1	0
Facebook	1	0
Facebook Messenger	1	0
BeeTalk	1	0
MyChat	1	0
tWeChat	1	0
MayMay	1	0
ShweJob	1	0
Wave Money	1	0
OK Dollar	1	0
Other Messaging a pp_____	1	0
Other Job-related app _____	1	0

ANNEX C:
QUALITATIVE ANALYSIS TOOL

Section A: Focus Group Details

- Code details

Section B: Demographics

- Present in percentages

Section C: Employment Situation

Reasons for working in a garment factory:

FGD Code	Notes	Themes

Attraction of garment factory work:

FGD Code	Notes	Themes

Challenges:

FGD Code	Notes	Themes

Hiring process:

FGD Code	Notes	Themes

Information flow in factory:

FGD Code	Notes	Themes

Abuse/ violence:

FGD Code	Notes	Themes

Labour organizations:

FGD Code	Notes	Themes

Salary:

FGD Code	Notes	Themes

Proof of employment:

FGD Code	Notes	Themes

Additional information:

FGD Code	Notes	Themes

Expenses

FGD Code	Notes	Themes

Savings:

FGD Code	Notes	Themes

Debt:

FGD Code	Notes	Themes

Additional Information:

FGD Code	Notes	Themes

Section E: Engagement with Technology

Introduction to technology:

FGD Code	Notes	Themes

Owning a smart phone:

FGD Code	Notes	Themes

Barriers to using technology:

FGD Code	Notes	Themes

Apps:

FGD Code	Notes	Themes

Sim cards:

FGD Code	Notes	Themes

Additional information:

FGD Code	Notes	Themes