International Labour Organization

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ILO Liaison Office in Myanmar

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Foreword

The COVID-19 pandemic has had a significant impact on the global garment sector and has been felt in every part of the supply chain. Myanmar's garment sector, a major contributor to jobs and livelihoods for the country, has been no exception, and during 2020, faced significant challenges to respond and recover from the pandemic.

This study, undertaken by Centre of Economic and Social Development (CESD), conducted primarily in late 2020 and in January 2021, provides insights into the consequences of COVID-19 on garment sector and its workers. This included managing many uncertainties including supply and demand disruptions, the impact of stay-at-home orders and the impact of government policies in response to the pandemic. During 2020 workers faced job losses, declining wages and job security that impacted on the livelihoods of thousands of people and their families.

Like previous studies, this study confirmed that small and medium-sized factories and local sub-contracted factories were less resilient than large factories to the pandemic. It also shows the vulnerability of Myanmar's workers who have weak social protections including no formal unemployment insurance scheme.

Understanding impact of COVID-19 on the garment sector, its workers and its workplace conditions, is crucial for labour market strategies to protect workers' economic and social wellbeing. Responses to the pandemic, not only in Myanmar, but also in the wider region provides important lessons about the resilience of workplaces to respond to crises.

The ILO extends its gratitude to CESD for conducting this research based on the contributions of factories, workers and other informants who dedicated their time to share their experiences.

Donglin Li

ILO Liaison Officer/Representative

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1. Introduction

The outbreak of COVID-19 negatively affected both developing and developed countries' public health systems and economies. To mitigate the spread of virus, many countries imposed restrictions and lockdown measures and as a result, the regional and global supply chains were disrupted. This resulted in a decline in the global trade in goods by 14 per cent in the first half of 2020 compared to the same period in 2019.[1] The International Monetary Fund (IMF) forecasted, in October 2020, that the global growth rate would fall by 4.4 per cent in 2020 and was expected to rebound again in 2021 by 5.2 per cent. The ILO estimated that in 2020, 8.8 per cent of global working hours were lost compared to the fourth quarter of 2019.[2] This was equivalent to 255 million full time jobs.

The garment sector has not been spared from the negative impacts of COVID-19 with the sector in countries in Asia and the Pacific region experiencing the brunt of the pandemic. Due to low consumer demand, government lockdown measures, order cancellations and supply chain disruptions, imports from Asian countries by overseas buyers dropped by up to 70 per cent in the first half of 2020.[3] Consequently, thousands of factories closed temporarily or permanently and workers suffered from job losses, a loss of working hours or income losses.

The first wave of COVID-19 in Myanmar started when the first case of COVID-19 was detected on 23 March 2020. Myanmar also experienced the second wave of COVID-19 later in the year. As of January 2020, the number of COVID-19 cases in Myanmar was 135,721 with 2,997 deaths.[4] The World Bank (December, 2020) estimated that Myanmar's GDP growth for the 2018/19 financial year was 6.8 per cent and declined to 1.7 per cent in the 2019/20 financial year. When comparing the trade volume before COVID-19 (April – September 2019) and during COVID-19 (April – September 2020), the total volume dropped by 2 per cent. Manufacturing exports also decreased by 13.5 per cent when compared to the same period before the pandemic.[5] In terms of employment, 142 factories in Myanmar either closed temporarily or permanently, and 171 factories reduced their labour force from early January 2020 to mid-January 2021.[6] Consequently, a total of 96,519 workers were laid off up to mid-January 2021 due to COVID-19 pandemic.[7] However, this figure represents only registered workers who are categorized as formal workers. According to Myanmar Labour Force Survey (quarter 2, 2018), 81.5 per cent of the labour force were informal workers. Thus, the impact of employment level in Myanmar due to COVID-19 could be significantly higher than official figures. According to the Myanmar Garment Manufacturers Association (MGMA), out of about 700 member factories, 50 closed during the first wave of COVID-19 and another 50 closed during the second wave.[8]

1 WTO (2020) https://www.wto.org/english/news_e/news20_e/covid_22dec20_e.htm
2 ILO Monitor (2021)
3 ILO (Oct 2020)
4 MOHS (2021)
5 World Bank Myanmar Economic Monitor (December 2020)
6 World Bank Myanmar Economic Monitor (December 2020)
7 MoLIP (2021)
8 Myo Pa Pa San (2020)

Following the World Health Organization (WHO) declaration on March 11, 2020 regarding global pandemic, on March 13, 2020, the Government of Myanmar established a national-level central committee for prevention, control and treatment of COVID-19 chaired by the State Counsellor to initiate a nation-wide coordinated response to the pandemic. At the same time, a COVID-19 economic relief committee was formed to respond to the impact of COVID-19 on the economy. Then, like many other countries, the Government imposed a range of measures to control the crisis, including interstate travel restrictions and mandatory factory closures.

The purpose of this study is to provide an overview of Myanmar's garment sector and how it has been impacted by COVID-19 pandemic from the firm and workers' perspectives. The study also provides some analysis on the implications of the recovery process. This report is divided into three sections. The first section provides an overview of Myanmar's garment sector as well as how the sector fared during the pandemic based on the review of previous studies. The second part focuses on the effect of COVID-19 on factories and workers and the future of industry based on factories and other stakeholders' interviews. The last part describes the conclusions of this report.

2. OVERVIEW OF MYANMAR’S ECONOMY AND GARMENT SECTOR

The development of Myanmar's political economy can be classified into four periods: A parliamentary democracy with a mixed economic system (1948-1962)[9], a socialist economy with central control supported by a nationalism ideology (1962 – 1988), a transition to market-oriented and semi-open economy under military regime (1989 -2010); and an market-oriented and more open economy (2010 onward). As a result of political and economic liberalization from 2011, many sanctions imposed by United States, Canada and the European Union were suspended and later lifted. In 2013, EU reinstated Myanmar into its Generalized System of Preferences (GSP) and the US restored Myanmar's trade benefits in 2016. Myanmar's garment sector has greatly benefited from lifting sanctions and in favor of these trade preferences. The growth of Myanmar garment sector was continuously growing until the COVID-19 crisis.

Prior to the COVID-19 pandemic, the garment and leather related industries was made up of about 940,000 workers in 2019. Among them, the export-oriented garment factories constituted of more than 600,000 workers, representing about three per cent of the country's labour force.[10] Since 2015, the Government identified the textile and garment sector as a priority sector under the national export strategies.[11] Garment exports grew more than five times from USD 912 million in 2012 to USD 5.02 billion in 2019 which made up about 28 per cent of Myanmar's total export value in 2019. Among garment export destination countries, the EU was the largest and Japan was the second largest destination for Myanmar garment products, representing 75 per cent of Myanmar's total garment exports in 2019.[12] The majority of garment factories in Myanmar operate under the Cut-Make-Pack (CMP) system. The factories that operate under the CMP system are exempt from the raw material import tax and clothing export tax. Other manufacturing models like the free onboard (FOB) system are required to pay at least a five per cent tax for importing raw materials and a nine per cent tax to export finished products[13]. A majority of raw materials (such as fabrics) for garment factories in Myanmar are imported from abroad, mainly imported from China. According to CESD-Just Job (2018) garment enterprise survey, 74 per cent of factories imported raw materials (e.g. fabrics, sewing silk) exclusively from China. Furthermore, the MGMA reported that 90 per cent of raw material imports come from China[14]. Prior to 2010, majority of garment factories were owned by domestic investors. However, due to liberalization of investment regime and GSP tariff benefits for Myanmar, the number of foreign owned factories increased over time. Out of all the garment factories, the share of foreign owned factories increased from 44 per cent in 2017 to 63 per cent in 2019 while the composition

9 Khin Maung Kyi, et al. (2000).
10 Myint Soe, President, MGMA (2019).
11 First five-year Myanmar’s National Export Strategy and second five-year Myanmar’s National Export Strategy
12 UN Comtrade (2020)
13 CESD (2018)
14 MGMA (2020).

of Myanmar owned factories dropped by 19 per cent during those periods.[15] About 91 per cent of export-oriented garment factories are located in Yangon region, primarily in industrial zones.

Similar to other garment exporters in the region, the Myanmar garment sector is a female-dominated industry and about 90 per cent of workers in export-oriented garment factories are female, most of whom are under 35 years of age.[16] Moreover, the expansion of the industry is mainly concentrated in Yangon and Bago regions, which has led to a dramatic increase of rural to urban internal migration. A majority of garment workers are internal migrants from outside Yangon region, especially from Ayeyarwaddy and Magway region.

2.1. Myanmar Government's response and COVID-19 related regulations

To prevent the spread of COVID-19, on April 2 2020, the Government announced the closure of schools, public events, large gatherings and religious events and instituted a stay-at-home order for the whole country from April 10 to April 19 2020. The Ministry of Health and Sports (MOHS) published a guideline for factories and workplaces to control and prevent the transmission of COVID-19 on April 19 2020 and updated it on June 26 2020. The guideline for factories and workplaces included a range of preventive measures to be followed by employers and employees at workplace, canteens, ferries, and dormitories[17]. On April 19 2020, the Ministry of Labour, Immigration and Population (MOLIP) announced that all factories need to remain closed from April 20 to 30 until an official inspection of the workplace was conducted to determine whether each complied with COVID-19 related regulations established by MOLIP, MOHS and regional governments.

However, due to the second wave of COVID-19, on September 20 2020, MOHS announced a stay-at-home order for townships in Rakhine, Yangon, Mandalay, Ayeyarwaddy, Bago and Mawlamyaing, due to the high number of COVID-19 cases in these areas. Workers were not permitted to go to their workplaces from September 24, 2020 to October 7, and this was later extended to October 21, 2020. However, the government allowed the reopening of CMP factories in Yangon region that had already prepared all necessary measures in accordance with guidelines for factories and workplaces to control and prevent COVID-19 transmission, starting from October 12 2020.

In response to the pandemic, the Government launched the "Covid-19 Economic Relief Plan (CERP)" on April 27 2020, which included seven short-term goals to be completed before the end of 2020. This included the plans to provide monetary stimulus packages as well as exemptions from taxes and fees, to ease the strain on the banking sector and affected firms, promoting investment, international trade and workers' social protection.

To meet the goal of the CERP, the Government established 100 billion MMK loan fund (with 1 per cent interest) to provide support the businesses and industries, which had been the most affected by COVID-19. The size of fund was later increased to 200 billion MMK. Initially, the Government had identified that the garment industry, hotel and tourism industry and SMEs are the most likely to be affected by the pandemic. The eligibility criteria to receive support from the Government was that the beneficiary firm must be registered as a local company, must have made contributions to the Social Security Board (SSB), have the capacity to survive, and ability to repay the loans. Due to these criteria, foreign owned garment factories were not eligible for support from this initiative. However, the Government did allow flexibility on the payment of income tax and commercial tax, and an exemption of 2 per cent interest on exports until the end of 2019-2020 budget year for those identified three sectors[18].

15 MGMA (2017) & (2019)
16 CESD-IDRC Garment Factory Survey (2017)
17 MOHS (2020)
18 Notification (1/2020). 18 March 2020. Ministry of Planning, Finance and Industry, Myanmar

In addition, the International Monetary Fund (IMF) approved USD 356.5 million emergency assistance for Myanmar in June 2020 to support minimizing the impact of COVID-19 by stimulating the economy and investing in health and social safety nets. Following the second wave of COVID-19, the IMF approved a second emergency financial assistance package equivalent to about USD 350 million in January 2021.[19] The IMF's financial assistance aimed to cover higher social spending needs under a continued strain on revenue and to mitigate the risk of excessive monetary financing.

2.2. Supply chains during COVID-19

Understanding the overall structure of the garment sector supply chain is key to understanding the extent to which the sector was impacted during COVID-19. The garment manufacturing model can be divided into four stages along the value chain – CMP, FOB/OEM, ODM and OBM[20]. These manufacturing models in the global value chains include:

(1) Cut-Make-Pack (CMP): The contracted garment firm only focuses on production alone. The supplier/buyer provides the inputs, specifications, and design of the products.

(2) Free on Board (FOB): The manufacturer is responsible for production activities as well as activities to procure the necessary raw materials for production.

(3) Original Design Manufacturing (ODM): The garment firm is in engaged in designing activities in additional to FOB.

(4) Original Brand Manufacturing (OBM): This business model covers branding and marketing activities in addition to previous stages of the value chain

Most of the export-oriented factories categorize[21] themselves as a CMP based factory in Myanmar.[22] However, some factories that focus mainly on the local market operate as ODM. As mentioned earlier, sourcing raw materials are mainly from China and the use of local materials is very limited. According to regulations, a CMP factory in Myanmar is required to export 100 per cent of its products[23]; otherwise firms are liable for tax on imported raw materials and the product's export. Despite many garment factories relying on sourcing from China, different factories focus different markets. Table 1 shows the export destinations in 2019 for Chinese, Korean and Myanmar owned factories and the level of diversity of the export destinations.

19 IMF (2021)
20 Fernandez-Stark et al. 2011
21
22 CESD-Just Jobs (2018)
23 CESD-Just jobs (2018)

Table 1: Myanmar garment export destinations by factory owner

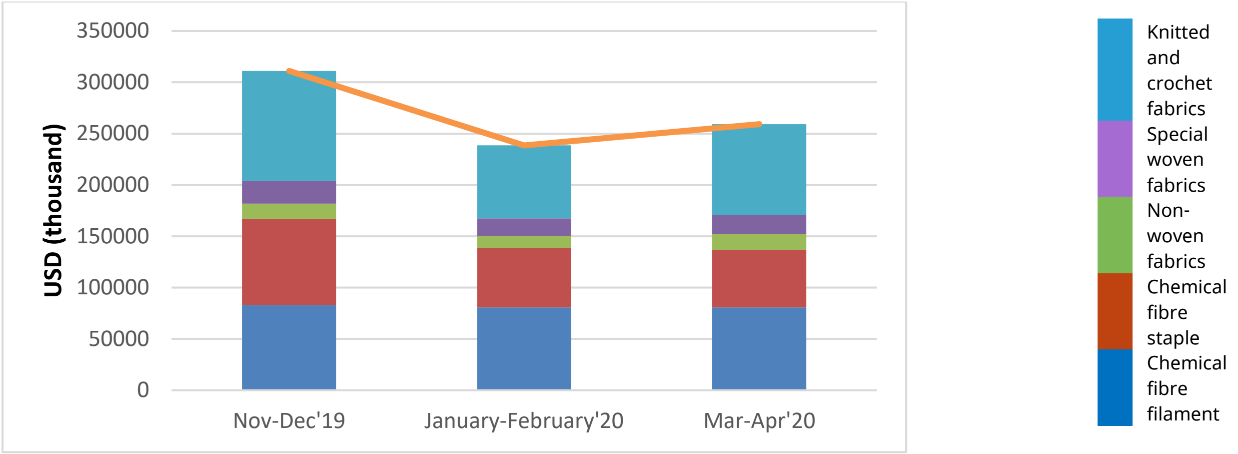
		Export destination (country)							
		EU	Japan	Korea	China	UK	USA	ASEAN	Others
Factory ownership (nationality)	China	101	64	30	66	4	21	7	25
	China-HK	38	15	1	13	2	12	2	20
	ASEAN	7	3		2		2	2	2
	Korea	28	30	51	12		4		
	Japan	3	17	4	4			2	
	MC	40	41	25	13	7	8	7	7
	Others	27	15	2	5	2	8		4
	JV	15	15	10	3	1	3	3	2

Source: MGMA (2019)

Prior to the announcement of the global pandemic, garment factories in Myanmar had started experiencing the effects of COVID-19.[24] On February 21 2020, the MGMA held a press conference jointly with the Chinese and Korean garment associations about the shortage of raw materials from China due to the outbreak of COVID-19.[25] Some garment factories faced shortages of raw materials which resulted in the temporary closure of factories as China imposed restrictions on border trade and there were delays in shipments from China.[26] For example, Myanmar trucks were not allowed to cross in to China in April 2020.[27] To overcome this situation, the Government initiated joint efforts with private sector associations and the Chinese Embassy in Myanmar to resume the inflow of the raw materials from China.[28] According to the Chinese Custom database, raw materials from the garment manufacturing exports from China to Myanmar declined by 30 per cent in January and February 2020 compared to the two preceding months in late 2019 (see figure 1). Again, according to Myanmar Ministry of Commerce trade data, imports of raw materials for CMP operations[29] in Myanmar decreased by 19 per cent in 2020 compared to the same period in the previous year. However, the shortage of raw materials was under control by March 2020.[30]

24 Global New Light of Myanmar (2020)
25 MGMA newsletter, February 2020
26 Hay Man Pyae and Zaw Ye Thwe, (2020)
27 Bharat, 2020.
28 Global New Light of Myanmar, 2020
29 Consignments of goods for CMP operations. CMP operation cover more than garment sector, however, garment sector contribute the highest.
30 Myanmar Times (March 2020): More woes for Myanmar garment industry as EU cancels orders

Figure 1: Imports of raw materials from China for garment manufacturing in Myanmar (Nov-Dec 2019 to Mar-Apr 2020)



Source: Chinese Custom database (2020)

Reports have cited how some international apparel brands/buyers cancelled or suspended orders, and, in some cases invoked force majeure.[31] Myanmar was not immune from this situation.[32] Due to the spread of COVID-19 and the decrease in demand at export destinations, the garment factories in Myanmar experienced even bigger challenges of declining orders from buyers in the EU, US, and Japan. According to MGMA, orders for winter clothes in August 2020 were only 25 per cent of previous orders in 2019[33] and at the time, there were no orders. Other estimates from MGMA referred to a 50 per cent decline in demand in July 2020[34].

Among export destination countries, the EU and Japan represented 75 per cent of Myanmar's garment exports in 2019.[35] Due to lack of data, it is difficult to estimate changes in trade patterns with all trading partners. However, Figure 2 provides a clear picture of the changes of exports by selected countries before COVID-19 period and during COVID-19 in 2020. It indicates that different countries have different fluctuation patterns. Since the beginning of the COVID-19 outbreak in China in January 2020[36], the garment export value for Japan (May 2020) and for the EU and USA (June 2020) were recorded at their lowest level. In the first half of 2020 (January to June), Myanmar's garment exports were down by 71 per cent for the EU, 56 per cent for USA and 48 per cent for Japan, respectively. However, Myanmar's garment exports rebounded again from July 2020. On the other hand, Myanmar's garment exports to USA rose in October year-on-year by almost 25 per cent.

31 McNamara, 2020 and Bloomer, 2020.

32 Lin M.Z et al, 2020. Impact of COVID-19 on the Garment Sector in Myanmar: Assessing the Income Loss of Garment Workers and Myanmar Times (March 2020)

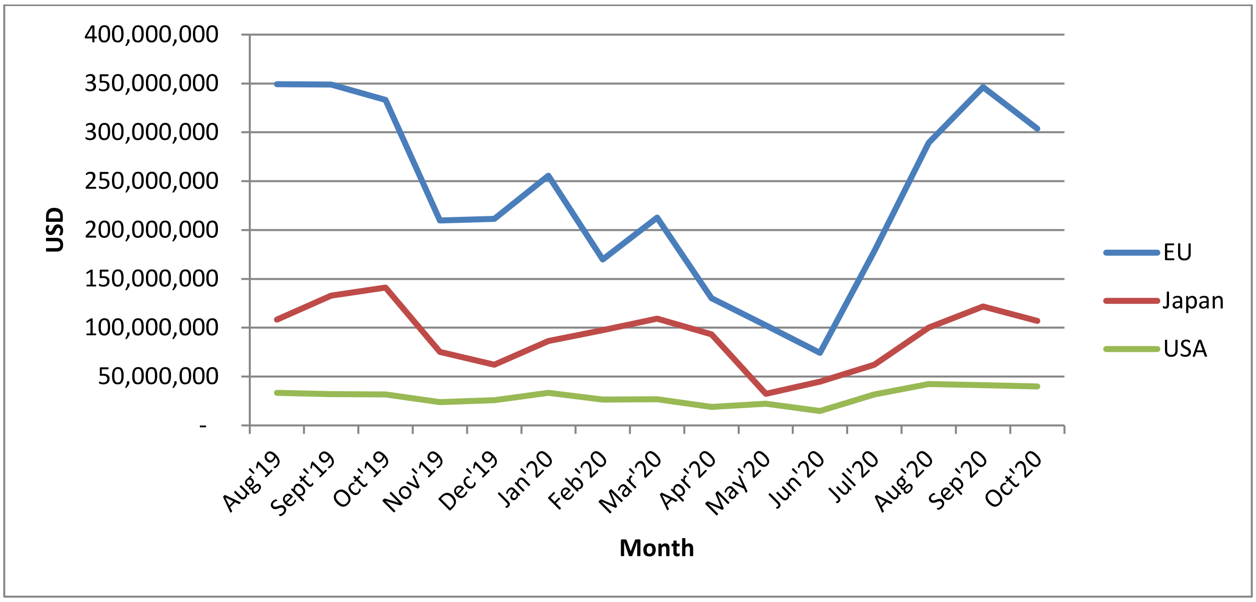
33 U Kya Win vice-chairman of MGMA quoted by the Irrawaddy 1st September 2020

34 Retrieved from https://www.irrawaddy.com/news/burma/myanmars-garment-sector-facing-implosion-orders-slump-covid-19.html

35 Lin M.Z et al, 2020. Impact of COVID-19 on the Garment Sector in Myanmar: Assessing the Income Loss of Garment Workers

36 WHO (April 2020). https://www.who.int/docs/default-source/coronaviruse/situation-reports/20200423-sitrep-94-covid-19.pdf#:~:text=The%20first%20human%20cases%20of,%2C%20in%20December%202019.

Figure 2: Myanmar apparel and clothing exports (August 2019 – October 2020)



Source: UN Comtrade, 2021. HS code 61 and 62.

An ILO study in 2020 highlighted that stringent lockdown measures have contributed to lower consumer demand and lower income levels for workers.[37] Garment factories and workers in Myanmar also suffered during the COVID-19 period because of supply chain disruptions and lockdown measures.[38] At the same time, ensuring workers' safety and general population was at the forefront of response policies and lockdown measures was one of the primary tools initiated. The Government imposed a number of lockdown measures throughout 2020 and Myanmar had some of the most stringent measures compared neighbouring countries in ASEAN region.

During the first wave of COVID-19, the Government ordered a nationwide stay-at-home order and instructed all garment factories to carry out COVID-19 inspections by the concerned authorities (such as MOHS, MOLIP and Regional governments) from April 20 to May 15 2020.[39] Factories were allowed to resume operations if they received a Grade–A classification[40]. Otherwise, the factory would be required to follow the instructions of the joint inspection team in meeting the COVID-19 guidelines of MOHS. Due to high number of positive cases during a second wave of COVID-19, the Government instructed factories in Yangon and some townships in Ayeyarwaddy and Mandalay to suspend operations from September 27 to October 7 2020. This was later extended to October 21 2020. Some employers shared that enforcement of factory closures had resulted in many foreign buyers cancelling orders and shifting them to other countries.[41] The UK-funded Dana Facility's study (2020) reported that more locally owned factories were impacted than foreign owned factories despite government support. This is a general pattern observed throughout Myanmar's garment industry.[42] Moreover, the lack of capital and access to diverse international buyers has been the major challenges for domestic firms.

37 ILO (October 2020).
38 ILO-CESD (2020)
39 Notification letter of Ministry of Labour, Immigration and Population on 19th April.
40 Safety scores assessed by Ministry of Health and Sport (MoHS)
41 Aung Phay Kyi Soe and Thomas Kean, (2020)
42 ILO-CESD, EU-CESD.

2.3. Social Protection

The following section discusses the role of the Occupational Safety in Myanmar and the role of the SSB during COVID-19. Ensuring the health and safety of workers both inside and outside the workplace is essential to maintaining livelihoods and productivity (ILO, 2020)[43]. To promote safe and secure workplaces for workers and increase their efficiency and productivity, the Occupational Safety and Health Law was passed by the Assembly of the Union of Myanmar on March 15 2019. However, this law has not been promulgated pending its implementing regulations.

The law when it comes into force would apply to the 18 categories of industries/businesses. It is also applicable to both foreign and domestic companies, either privately owned or state-owned. The law provides that a factory must be registered under the Factories and General Labour Laws Inspection Department (FGLLID). The employer is responsible for appointing a person in-charge for OSH, to form the OSH committee to perform OSH duties, provides for duties of employees such as to comply with OSH regulations, to use personal protective equipment systematically and to report to the person in-charge of any negative impacts on OSH conditions.[44]

Social security in Myanmar is governed under the Social Security Law (2012) and the SSB is the implementing body that oversees the management of social security schemes. The Social Security Law (2012) includes reference to six schemes[45]. Despite the inclusion of an unemployment insurance scheme in the Social Security Law (2012), it is not active. The only active schemes under this law are the health and social insurance and employment injury schemes. Workers participating in the social security scheme make contributions of 2 per cent each month while employers pay 2 per cent to the health and social care scheme and 1 per cent to the employment injury scheme[46]. Due to COVID-19, as mentioned in CERP, the SSB relaxed its procedures and allowed employers/ employees to postpone payments by three months, due to the hardship businesses faced due to COVID-19.[47] In addition, the duration of medical benefits for unemployed workers was extended from six months to one year from the date of unemployment.[48] An EU-CESD (2020) survey found that among insured textile and garment workers, more female workers visited private clinics/hospitals instead of SSB clinics/hospital compared to their counterparts because they were more accessible.[49]

As mentioned earlier, MOHS ordered the temporary closure of close factories /workplaces to conduct inspections in accordance with COVID-19 guidelines, from April 20 to May 15 2020. As a result, MOLIP announced that insured workers would be eligible to receive 40 per cent of their salary for the equivalent time a factory was closed.[50] However, due to the delay of procedures, 53 per cent of insured workers in the garment sector had not received the 40 per cent salary compensation, and at the time of the survey it had already been two months since factories re-opened.[51] In addition, during the second wave, on September 24 2020, MOLIP announced 40% SSB support for insured workers who work in factories located in the townships where the stay-at-home order had been initiated, such as Yangon, Bago, Mawlamyaing, etc. The 40 per cent salary compensation was calculated based on the month, instead of based on days of factory closures, in order to simplify the procedures.

43 ILO. (November 2020).
44 International SOS Foundation. (n.d.).
45 Tessier, Lou and Mi Win Thidar, (2014)
46 Lin & Ngwenya,(2020a)
47 Tilleke & Gibbins (31 March 2020).
48 Fair Wear (2020).
49 EU-CESD worker survey data (2020)
50 Eurocham Myanmar (28 April 2020).
51 ILO-CESD (2020) Income loss study

As of January 28, 2021, 1,396,734 workers from 36,035 factories and businesses have registered and contributed to the SSB.[52] According to the ILO-CESD (2020) study, 16 per cent of the survey respondents were not a member of SSB scheme. Similarly, another EU-CESD (2020) survey reported that 84 per cent of then employed garment workers were part of the SSB scheme. However, many garment workers in Myanmar were still not part of the social security system and are thus not eligible to receive the 40 per cent compensation by the SSB during the COVID-19 pandemic.

Under the law, contributions should be according to the monthly wages of workers. However, according to the findings of the EU-CESD (2020) survey, employers and employees contribute an average of 2821.48 MMK (USD 2.00) per month. This data suggests that contributions to SSB are under-reported and the employer and employee contribute only on the basis of the minimum wage (basic pay), which is 4,800 MMK (USD 4.00) per day (approximately 115,200 MMK per month). Since 40 per cent salary compensation was calculated based on the salary amount that is reported to SSB, the actual compensated amount received by workers was based on the basic salary. The basic salaries of garment production workers represent around 60 per cent of total salary (net-take-home salary).

The European Union launched a 5 million Euro Myan Ku (quick assistance) programme that provided financial support to garment, textile and footwear industry workers in April 2020. Depending on eligibility, workers could apply for a minimum monthly benefit of 30,000 MMK to a maximum monthly benefit of 125,000 MMK.[53] Until December 2020, 1,082,320 payments had been arranged to approximately 60,000 factory workers receiving 8.1 billion MMK of the fund. Beneficiaries of Myan Ku received two or three separate payments through the Wave Money mobile transfer platform.

52 Social Security Board (28 January 2021).

53 SMART Textile & Garment (n.d-b).

3. IMPACT ON GARMENT WORKERS

3.1. Impact on jobs, income, remittances and debt

This section discusses job losses the garment industry in Myanmar experienced during COVID-19, the income loss of workers, especially migrant workers, which impacted their remittances and the overall state of industrial relations. Globally, 114 million jobs in 2020 were lost in comparison to 2019 and the employment loss for women was 5 per cent compared to 3.9 per cent men.[54]

Similar to other countries in the region, COVID-19 resulted in major layoffs for Myanmar workers. In the course of 2020, garment factories were temporarily or permanently closed due to the Government's stay-at-home orders, supply chain disruptions, order cancellations and a decrease in orders from international buyers. Given that Myanmar's garment sector is principally CMP, factories were significantly impacted resulting in a reduction in the workforce with many workers being laid off. In July 2020, the ILO projected that between 6.9 and 7.3 million jobs in Myanmar could be disrupted as a result of the pandemic.[55] MOLIP shared that from January 2020 to September 23, 2020, over 230 factories closed or reduced workforces. As a result, over 73,000 registered workers in Myanmar were laid-off.[56] But due to lack of disaggregated data, it is not clear how many are from garment industry. According to EU-CESD (2020) factory survey, there was a 26 per cent reduction in the workforce in garment and footwear industry in 2020.[57] Small and medium sized factories and/or local market focused factories reduced workforce the most.

When workers are dismissed from their jobs, they are legally entitled to severance pay (with some limited exceptions).[58] Under Myanmar's labour laws, the severance payment is calculated based on workers' last salary (without overtime fees) and the duration of continuous employment in the factory/workplace.[59] In accordance with Notification 84/2015, employers are legally obliged to give their employees that have been laid-off severance pay. The notification goes further to outline the proportion of severance pay employees receive based on the duration of employment. It states that the "amount of compensation depends on the time of consecutive employment, with a severance payment of one-half monthly salary after a minimum employment period of at least six months up to 13 monthly salaries for employees having been employed for more than 25 years".[60]In case of a dismissal with reason or resignation of the employee, no severance payment is payable and only outstanding payments for probation period at the time of termination are payable.[61]

54 ILO Monitor (2021)
55 ILO (2020)
56 One news Myanmar (2020).
57 EU-CESD (2020)
58 The ILO, (2019)
59 Notification No. 84/2015, Ministry of Labour, Immigration and Population.
60 Luther News,(2015)
61 Kam & Lorenz (2018)

According to the studies conducted by CESD (2020), 55 per cent of the surveyed laid-off workers had received the severance pay and 45 per cent did not receive severance pay.[62] Another study reported that 73 per cent of laid-off garment workers received severance pay. Both studies highlighted that laid-off workers had spent their severance pay mainly on food, accommodation, remittances and paying back loans.

3.2. Income losses and loans

According to the ILO (2021), the global labour income loss in 2020 was 8.3 per cent, which amounts to USD 3.7 trillion and the labour income loss within Asia and the Pacific region was at 6.6 per cent in 2020. A study conducted by Care International (2020) reported that employed garment workers in Cambodia experienced a 42 per cent decline of their salary due to the COVID-19.[63] A study by ILO-CESD (2020) reported that employed garment workers in Myanmar experienced an 8 per cent loss of total net-take-home salary in June 2020 compared to November 2019. The cut of overtime hours was the main driver of salary losses. Furthermore, this was also highlighted by an EU-CESD worker survey (2020) that showed employed garment workers income continued to decline in the second half of 2020 – with a 14 per cent decrease of total salary in August 2020 compared to January 2020. Both studies found that the loss of salary among workers was unevenly distributed with small and medium-sized factories the most affected by the pandemic. In addition, the findings of these studies show that garment workers in Myanmar were likely to experience higher income losses compared to average labour income loss within Asia and the Pacific region.

As most factory workers who were laid-off were women and internal migrant workers, losing their jobs during the pandemic affected their livelihoods as well as their families who depend on remittances. Laid off workers spent their severance pay on sending remittances to their families, demonstrating how laid-off workers families' livelihoods depend on their incomes.[64] According to EU-CESD textile and garment worker survey (2020), remittances by internal migrants who were still employed declined by 35 per cent while remittances by respondents who were still unemployed during the survey declined by 51 per cent between March and August 2020, compared to the same period in 2019.

To further exacerbate this, the lack of social security and an unemployment insurance scheme in Myanmar, borrowing money was one of the last resorts used by workers to survive. Due to the lack of collateral in the form of assets and complex borrowing procedures, it is almost impossible for workers to access formal financial institutions and borrow therefore money from informal money lenders at high interest rates[65]. A recent study found that 53 per cent of the garment and textile workers borrowed money between March and August 2020 with a monthly interest of 10.5 per cent.[66]

62 EU-CESD (2020)

63 ILO (2020b),

64 EU-CESD worker survey (2020)

65 Frontier Myanmar (June 2020): COVID-19 pushes rural Myanmar towards moneylenders

66 EU-CESD workers survey

3.3. Industrial relations

In demonstrating their frustration and desperation, thousands of garment workers took strike action during the pandemic,[67] despite restrictions on organizing demonstrations due to COVID-19 rules [68]. Workers sought to prevent dismissals and to be compensated with benefits.[69] This resulted in heightened tensions between employers and employees, early in the pandemic. Some factory owners left after closing their factories leaving workers unpaid.[70]

Another issue that emerged was the lack of a clear description of lockdown rules. For example, during the first wave of the pandemic, lockdown orders for factories were issued at short-notice, and came into effect less than 24 hours after their publication. A representative of the CTUM and a representative of the MGMA shared that the status of industrial relations improved over time despite the friction between employers and employees.[71]

According to ILO-CESD worker survey (2020), the stress levels of many garment workers at work increased compared to before the pandemic, especially due to the possibility of factory closures, pressure to meet the order targets and COVID-19 rules in workplaces. Findings revealed how it was difficult for workers to maintain six feet physical distancing in the factories and dormitories.

67 Myanmar Times (27 March 2020)
68 The Guardian (Oct 2020): COVID-19 laws are getting used to slice garment workers
69 China Labour Bulletin (December 2020): Myanmar workers protest union busting efforts in the garment industry
70 https://www.irrawaddy.com/news/burma/myanmars-garment-sector-facing-implosion-orders-slump-covid-19.html
71 Fabric Asia's live panel discussion on "Getting through this crisis together".

4. STAKEHOLDER VIEWS

The following section reflects some of the key findings and perspectives drawn from factory owners and other stakeholders who were interviewed. The analysis of the findings is based on the data and insights provided by the ten garment factories during the factory visits and phone interviews with other key stakeholders (see table 2). Although the factory visits cover factories with different characteristics (such as size, export destinations and ownership) it cannot be concluded that the findings are representative of garment industry in 2020.

Table 2: List of interview respondents

Myanmar-owned export oriented factory	1
Myanmar-owned local subcontracted factory	2
Japanese-owned factory	1
Chinese-owned factory	2
Korean-owned factory	2
German-owned factory	1
Indonesia-owned factory	1
Logistic Company	1
Employed worker	2
Laid-off worker	1
Union representative	1

4.1. Supply chain disruptions

As mentioned earlier, most of the export-oriented garment factories in Myanmar are categorized as CMP factories and enjoy a tax exemption for importing raw materials and exporting finished goods. Almost all raw materials are imported from abroad, especially from China based on the buyers/suppliers specifications and the design of products. Under the CMP system, most buyers/suppliers are responsible for purchasing the raw materials and delivering them to Myanmar. Among interviewed exported firms, 77 per cent of their raw materials were imported from China while the rest were imported from other countries, mainly in Asia.

The garment industry is a buyer-driven value chain and brands/suppliers dominate the market and set the prices of the products. Lead-time is one of the important aspects of the relationship between brands/suppliers and manufacturers in order to maintain competitive prices and the business relationship.[72] Financial penalties

72 Behrooz Asgri and Anyul Hoque (2013)

may be imposed by a brand/supplier for late delivery.[73] Half of the interviewed factories experienced a shortage of raw materials for two to three weeks, due to transport disruptions and/or the closure of supplier factories in China, especially in the months of February and March 2020. In order to reduce the transportation time, some factories shifted their modalities from sea shipment to overland transportation, despite a 10 to 15 per cent higher transportation cost. Most of the interviewed firms agreed that the situation then normalized after April 2020.

But, the garment industry in Myanmar faced further challenges due to order cancellations or suspensions from buyers and brands. More than half of the export oriented factories shared that they faced order suspensions that were already awarded or in-process during the pandemic. Fortunately, among them, orders of only a few interviewed factories were cancelled while the orders of the rest of the factories could be exported two to three months later. Besides, a few factories contracted by well-known brands and a Korean owned factory[74], the interviewed factories said that the volume of orders had halved in 2020.

Due to the COVID-19 restrictions and lockdown measures, factories have faced challenges of performing at full capacity. Thus, some export oriented factories among Myanmar's subcontractors shifted some part of the buyers/suppliers' orders to other firms (especially locally owned factories) in the country to meet order deadlines. During COVID-19, such arrangements continued, mainly after the domestic lock down periods between May and October 2020. Two-thirds of interviewed factories received subcontracting work from other factories, representing 33 per cent of their total production in 2020, which assisted them to maintain their operations. A Chinese-owned factory manager explained:

> "In the past, we don't need to take sub-contract work from other factories as we have our own buyers. Due to the decline of orders from our regular buyers from the EU, we asked other factories in Yangon to share some orders with us despite the CMP fees being lower than regular price. Otherwise, we would have to close our factory."

Two factories also engaged subcontractors when some workers tested positive for COVID-19 and their operations were closed temporarily.

Delivery time is also another crucial parameter in the supply chain to compete with others in the market. The findings from interviewed factories show that the average container delivery time to export destinations increased from 24 days in November/December 2019 to 28 days in November/December 2020. This delivery time usually includes time for document preparation, container loading and shipment time. The logistics officers from some interviewed factories shared that this delay was also due to a shortage of labour at Yangon ports. A respondent from a Japanese-owned Freight Forwarder Company said:

> "But, because of port congestion at [a] major transit port (Singapore) and [the] Government's order to civil servants to come to the office on a rotational basis (only half of staff at a time in the office), the shipment time was delayed, especially during the second wave of COVID-19 and thereafter."

73 Human Rights Watch (2020)

74 Produce own brand and sell at own fashion stores (including on-line store)

Among the export oriented factories interviewed, they noted there was no significant increase in customs clearance fees, shipping/container fees and agent fees. However, some shared that the expenses for staff transportation increased as private transportation was needed for operations to protect workers from COVID-19 transmission.

Under CMP arrangements, the CMP price is a significant factor for manufacturers to maintain their competitive edge with others. The COVID-19 pandemic resulted in increased price pressure on manufacturers. More than half of interviewed factories said that the CMP price for the same products that they produced in 2020 were lower than the previous year. The CMP price for the same products reduced by about 42 per cent for those factories in 2020 compared to 2019.

An owner of Korean garment factory said:

> "Before [the] COVID-19 pandemic, I had five regular buyers including well-known brands from US and EU. At present, I have no orders from those regular buyers for the upcoming season. In the past eight months, the total volume of orders received decreased by more than 40 per cent on average. Before COVID-19, I had received USD 4.00 for making a jacket. Now, they offer only USD 3 for making the same jacket. I have no other choice."

This illustrates the challenging position factory owners faced to maintain their factory operations, yet doing so at much lower prices than prior to COVID-19.

4.2. Factory level disruptions

As referred to earlier, to prevent the spread of COVID-19, the Government imposed restrictions on the mobility of people across the country and issued orders for factory closures temporarily twice in April and September 2020.[75] It was observed that about half of the interviewed factories closed for a longer duration than what was stipulated by the government, which was officially 28 – 30 days. Small and medium-sized factories interviewed were closed for more than 50 days[76] during 2020 due to COVID-19. In addition to the government's orders for mandatory closures, findings show that the interviewed factories extended their closures for about 14 to 16 days on average. This was mainly due to the lack of orders and/or raw materials.

Apart from factory closures, COVID-19 also impacted on operating hours. Before the COVID-19, many of the interviewed factories asked workers for overtime in addition to normal working hours[77] to meet production targets. Overtime rates apply for additional working hours under Myanmar's Minimum Wage Law.[78] The overtime rate is calculated as double the basic wage.[79] On average, the interviewed factories shared that their monthly over-time operating hours reduced to 18 hours in December 2020 compared to 41 hours in January 2020.

Many respondents shared that the second wave of COVID-19 had more negative effects on operations than the first wave. This was due to more mandatory closure days and an increase in local transmission and positive cases in Yangon during the second wave. However, a few shared that the first wave was worse. An HR manager of Indonesian-owned factory said:

75 ILO Monitor (2021) COVID-19 and the world of work. Seventh edition
76 Not including public holidays and Sunday.
77 This is eight hours per day from Monday to Friday and four hours for Saturday
78 Minimum Wage Notification (1/2018)
79 Factories Act, 1951

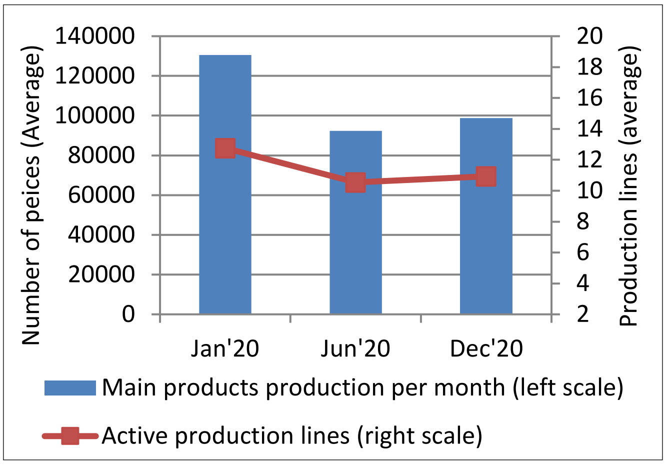
> "We never experienced such kind of crisis before. Workers were in a panic. There are no clear guidelines to follow. Buyers suspended the orders. During the second wave and after, we are well prepared and were able to adjust to the situation."

As shown in figure 3, the average production volume of interviewed factories decreased by over a third in June 2020 compared to January 2020. However, the average production level of those factories increased by a small margin in December 2020 among the large and extra-large factories. Despite the fact that there was some increase among large and extra-large factories in the second half of 2020, the production level of small and medium-sized factories continued to decline (figure 4). This suggests there were some possible signs of a recovery in the second half of 2020 at least among larger operations.

Due to the fear of COVID-19, some workers left their jobs and returned to their home towns. To manage the situation, a number of factories that were interviewed reorganized the production process and readjusted production lines. Production lines decreased on average from 13 lines to 11 lines among interviewed factories (figure 3). A director of a Myanmar owned factory said:

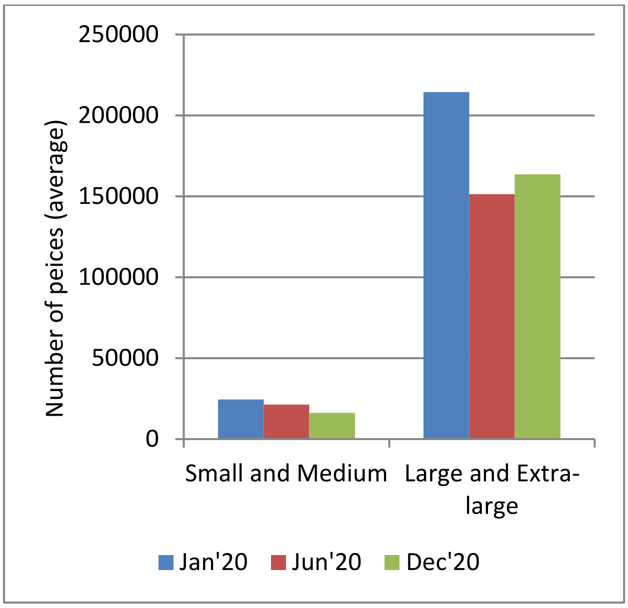
> "...at least five to 10 per cent of a production line's efficiency will decrease when skilled production workers are absent. The sewing machines are laid out in the particular manufacturing sequence and each worker ... is needed to accomplish their task in a harmonized manner within the standard times, to reach the production target. It takes two to four weeks to reach normal operation[s]."

Figure 3: Change of production and production lines



Source: Interviewed factories (2021)

Figure 4: Change of production from January to December 2020 (by size of factory)



Source: Interviewed factories (2021)

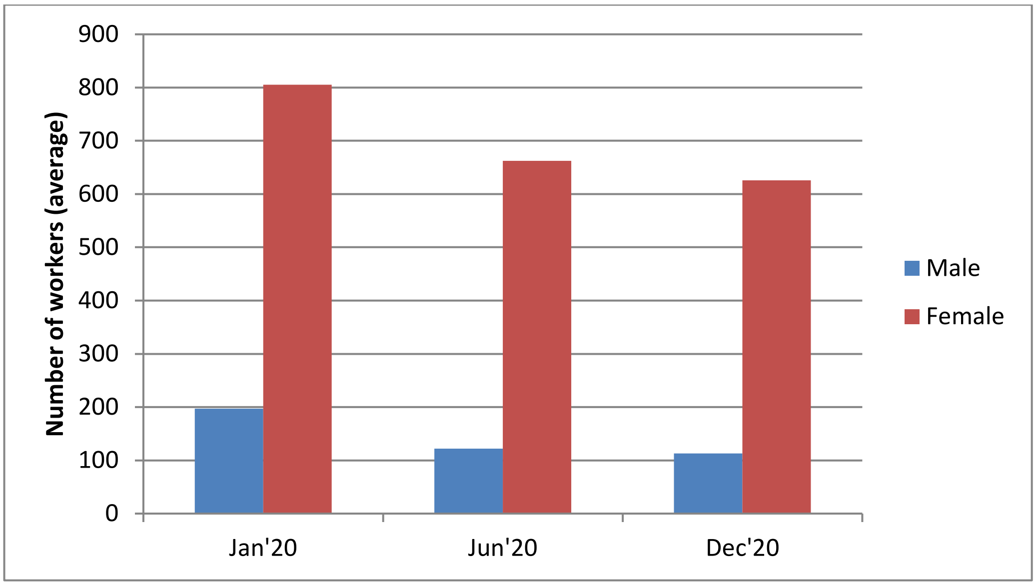
4.3. Impacts on the workforce

This section sheds light on workforce adjustments by factories since the outbreak of COVID-19. Despite signs of production growth in the second half of 2020 among interviewed factories, overall employment declined in both the first and second half of 2020. The number of workers dropped by 26 per cent in December 2020 compared to January 2020. This study observed that there was no impact on the share of female employment compared to men among interviewed factories as shown in figure 5.

In terms of dismissals of workers among interviewed factories, most who responded said that the main criteria was based the length of time workers were employed in the factory. Severance pay is based on the duration of employment with an employer as described in Myanmar's labour law[80]. It was unclear what compensation was paid to workers who worked for less than six months. Some factories said they didn't have an obligation to provide severance pay or other forms of compensation if a worker resigned on their own volition or if they did not return to work due to the fear of contracting COVID-19 or other reasons.

80 In accordance with Notification 84/2015, employers are legally obliged to provide severance pay to an employee who has minimum of period of employment of six months if they are laid-off.

Figure 5: Change in workforce (by gender)



Source: Interviewed factories (2021)

Some those interviewed shared approaches to worker retention. A manager from a Myanmar owned factory said:

> "For the first time, we had dismissed workers who are under six months in this factory and for the second time, we dismissed workers who had worked for under two years. During COVID-19, we did not consider the skill grading of an individual worker. If not, there will be a complaint from workers regarding fairness."

Another Myanmar owned factory owner said:

> "Around 10 – 15 per cent of the workforce did not return to work to workplace after mandatory factory closure period. We waited for them for five to 10 days. Otherwise, they are terminated".

Therefore, general observations indicated that employers kept skilled and more experienced workers while new entrants and less experienced workers were laid-off.

Factories also tried to increase production levels with the remaining workforce by increasing production targets or asking workers to work overtime hours. It was observed that a few factories hired only short-term daily wage garment workers instead of recruiting contracted workers. The main reason cited was the uncertainty of the new orders and avoiding mandatory worker's benefits package such as social security and severance pay.

A union representative said:

> "...some non-union garment workers were not aware of their rights during ... COVID-19. That is why we have organized labour law awareness sessions as much as we can....Sometimes, employers take advantage of the weakness of labour law to avoid paying compensation benefits."

5. PROSPECTS FOR 2021

Prospects for 2021 were expressed during field research prior to the military assuming control of Myanmar on 1 February 2021. Therefore, uncertainties were wholly confined to responding to COVID-19. While the situation of the sector following the military takeover is not part of this study, the impact on the garment sector and workers has been significant and raised many new uncertainties across the sector.

Despite the fact that there some small signs of recovery in the sector at the end of 2020, many respondents expressed uncertainty about 2021 due to concerns about the availability of vaccines for many people in Myanmar. More than half of respondents shared that existing orders guaranteed less than three months of factory operations. In addition, half of factories interviewed were uncertain about future production volumes in 2021.

Some respondents said they would find new buyers in 2021 as they believed that existing buyers would not sufficiently sustain their operations. A few respondents also raised concerns that despite having buyers, their certificates of compliance were about expire in the coming months and due to travel restrictions into Myanmar, the auditing process by international experts could be delayed for some time. One in five respondents said they expected to recruit more workers. Most interviewed factories had no plans to make any technical upgrades to their mechanical production processes in the near future due to uncertainty and financial constraints.

6. CONCLUSION

The COVID-19 pandemic had disrupted the garment supply chain and significantly affected the stakeholders in the garment sector. The industry suffered a decline in production not only because of demand shocks in destination countries but also because of domestic lockdown measures. This study highlights that factories reduced their workforce without relaxing demand for workers' productivity as a survival strategy to compensate for the decline in CMP prices from buyers or COVID-19 related adjustment costs. Like previous studies, this study confirmed that small and medium-sized factories and local subcontracted factories are less resilient than large factories due to resource constraints and lack of direct market access.

This study revealed a downward trend in the workforce during the COVID-19 period in 2020, despite some signs of recovery in the second half of 2020. In the context of a lack of an unemployment insurance scheme and weak social protection systems, garment workers remain in a very vulnerable position.

Women make up over 80 per cent of the garment sector workforce. This sector has also been an entry point for thousands of young female workers from rural areas into formal employment status. Due to massive job losses in 2020 because of the COVID-19 pandemic, the state of women's economic empowerment is under threat.

Some literature suggests that the COVID-19 pandemic would likely accelerate technology adoption to upgrade the garment production system in some Asian countries.[81] Both the Myanmar National Export Strategy (NES) and Myanmar Garment Manufacturers Association (MGMA)'s strategy identified the role of transitioning from a CMP manufacturing model to a free on board (FOB) manufacturing model. However, it appears that factories are unlikely to adopt such a strategy under uncertain market conditions and financial constraints during the COVID-19 pandemic and still prefer to take advantage of low labour costs in Myanmar. Finally, the survival of the garment factories and workers in Myanmar will still be critical due to demand uncertainty, less financial resilience, a weak social protection system, and the absence of vaccines to the working population.

81 ILO. (2020), What next for Asian garment production after COVID-19?

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