



Labour-Market dynamics and worker power in apparel global value chains

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1. Introduction

The apparel industry is notorious for its poor wages and rampant labour-rights violations, with Covid-19 having aggravated these problems (Anner, 2022). However, the pandemic disruption was more than an aberration, continuing a long deterioration of workers' rights in global manufacturing hubs.¹ Tellingly, 16 of the 20 largest apparel-exporting countries in the Labor Rights Indicators saw their scores worsen between 2012 and 2019, while the number receiving the worst rating in the International Trade Union Confederation's Global Rights Index rose from 9 in 2016 to 14 in 2024.² What accounts, then, for the general lack of decent work in apparel global value chains (GVCs)?

This chapter shows that process of structural transformation are central

to increasing worker power, and that worker power is central to achieving better wages and working conditions.³ 'Structural transformation' refers to a set of processes which include the absorption of un- and underemployed labour into the formal economy through improved access to alternative livelihoods in the formal sector. This occurs as agricultural productivity increases and the industrial sector grows and diversifies, happening in tandem with declining fertility rates which serve to change the size and composition of the labour force. The pace, scale and depth of such structural transformation can boost workers' economic and political bargaining power. Economic bargaining power refers to the ability to disrupt the production process with the aim of extracting concessions



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¹ Verisk Maplecroft, Worldwide decline in labour rights strikes at heart of global supply chains: Human Rights Outlook 2021, available at <https://www.maplecroft.com/insights/analysis/worldwide-decline-in-labour-rights-strikes-at-heart-of-global-supply-chains/>.

² Center for Global Workers' Rights, Labour Rights Indicators. Retrieved from <http://labour-rights-indicators.la.psu.edu/> (date accessed: 20 August 2024); International Trade Union Confederation, Global Rights Index 2024. Geneva: ITUC.

³ This chapter is a summary of a forthcoming article by Kristoffer Marslev and Lindsay Whitfield.

from their employers regarding wages and working conditions, while political bargaining power refers to the ability to influence their government's policies regarding wages and working conditions. Notably, GVC participation can be a driver of the growing industrial sector and thus the formation of an industrial working class with sufficient size, strength and political significance to make a difference.

However, these 'decent work' gains can be eroded to a certain degree by the responses hereto of apparel-export firms as well as governments. This is because apparel manufacturing is characterised by its limited scope for economic upgrading, while the investment returns potentially enabling an increase in factory efficiency are usually captured by the brands and retailers involved (through falling unit prices) instead. Thus, firms respond to rising wages with labour regimes which intensify work, leading to declining working conditions and violations of rights; governments, meanwhile, use labour repression to undermine workers' collective action.

These points are illustrated through a comparison of the apparel industries in Madagascar, Cambodia and Vietnam, which all started exporting in the 1990s. In Cambodia and Vietnam, structural transformation (of varying kinds) has led to the erosion of wage premiums in apparel-export factories because the prices paid by buyers have been on a downwards trend or stagnant ever since, while wages in other sectors continue to increase. The erosion of the apparel-export wage premium and labour shortages have, though, given workers greater bargaining power. In Madagascar, tightening labour markets have not

occurred, so apparel-export factories have continued to attract workers by offering superior conditions even despite unliveable wages and excessive overtime. With worsening conditions in subsistence farming and a complete lack of alternatives, apparel workers there have remained acutely dependent on their employers and possess low bargaining power.

2. Madagascar, Cambodia and Vietnam: Different structural transformation trajectories

Madagascar, Cambodia and Vietnam integrated into apparel GVCs around the same time in the 1990s and under similar socio-economic conditions. Export-oriented apparel manufacturing was started by foreign suppliers establishing assembly factories in these countries to benefit from lower labour costs as well as preferential market access to the United States in the case of Madagascar and to the European Union in that of Cambodia and Vietnam (Whitfield and Staritz, 2021; Marslev, Staritz and Raj-Reichert, 2022). At that time, all three countries had largely agrarian economies characterised by their low productivity, with the vast majority of employment concentrated in (subsistence, own-account) agriculture (Marslev, 2019; Whitfield and Marslev, 2023). Despite these similar starting points, the three countries' trajectories would diverge over time: the apparel-export industries in Cambodia and Vietnam expanded in the context of, and contributed to, rapid structural transformation. In 2021, Vietnam's apparel industry was the third-largest in the world in terms of export value, while Cambodia's ranked seventh.

Table 1 below summarises these divergent trajectories in terms of the pace of structural transformation in Cambodia and Vietnam compared to in Madagascar.

Largely driven by the apparel- and footwear-export industries, Cambodia experienced a significant shift of labour from agriculture to industry,

whose share in total employment grew from 9 per cent in 2000 to 25 per cent in 2021. In parallel, employment in agriculture declined while agricultural productivity increased. A similar process played out in Vietnam, where the share of industry in total employment grew from 12 per cent in 2000 to 33 per cent in 2021, although industrialisation was more diversified.

Table 1: Apparel-export volumes and the pace of structural transformation in Madagascar, Cambodia and Vietnam

	Apparel-export industry		Structural transformation in national economy				
	Export revenue, 2021	No. workers, % of total employment, % of manufacturing employment	GDP/capita (2011 PPP), 1990	GDP/capita (2011 PPP), 2020	Agricultural growth & productivity	Industrial development & diversification	Demographic change
Madagascar	USD 670 million	120,000 (2021) 0.1% of employment 19% of manufacturing employment	USD 1,262	USD 1,301 (ninth-lowest in the world)	Low	Low	Little
Cambodia	USD 8 billion	770,000 (2019) 9.8% of employment 59% of manufacturing employment	USD 1,404	USD 3,728	High	Medium	Slight contraction in youth labour force
Vietnam	USD 31 billion	2.8 million (2021) 5.3% of employment 25% of manufacturing employment	USD 1,632	USD 7,395	High	High	Major contraction in youth labour force

Source: Authors' own compilation, using trade data from stats.wto.org; employment data from ILOSTAT, Labor Force Survey Cambodia 2019 and Statistical Yearbook Vietnam 2022; and GDP data from Maddison data project.

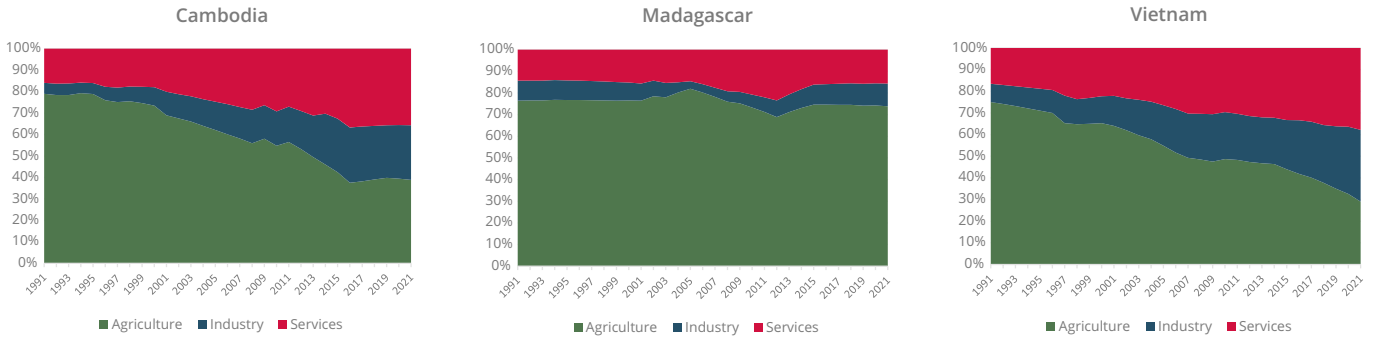
In contrast, Madagascar's apparel-export industry contracted over time due to political instability, rather than expanding. By 2021, it only employed around 120,000 workers and exported USD 670 million worth of goods. In general, Madagascar has experienced little in the way of structural transformation: industrial employment only increased modestly from 8 to 10 per cent between 2000 and 2021, including in the mining sector.

In the initial phases of apparel manufacturing for export, wages in this industry across all three countries were superior to those prevailing in rural and urban labour markets – constituting an apparel-export wage premium – but working hours were longer (Glick and Roubaud, 2006).

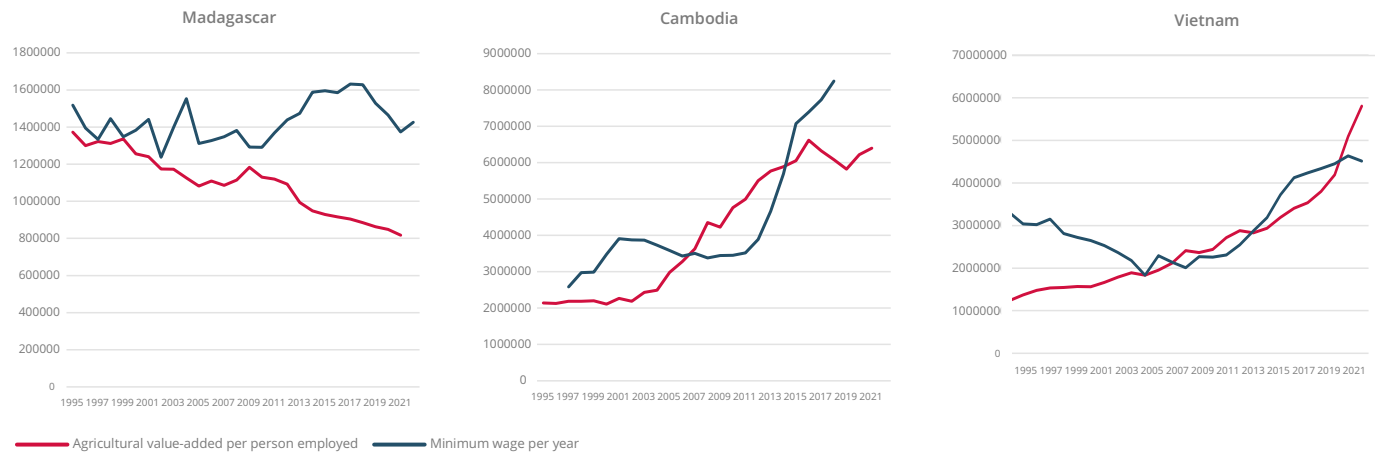
However, their diverging trajectories regarding structural transformation created different labour-market dynamics. Cambodia and Vietnam experienced industrial expansion combined with rising agricultural productivity, rapid urbanisation and falling fertility rates alongside labour-force growth, which reduced the pool of un- and underemployed individuals (see first and third rows in Figure 1 below). By comparison, in Madagascar over the last three decades the share of agriculture in total employment has remained virtually unchanged; agricultural conditions have deteriorated due to an increasing number of natural disasters such as droughts and cyclones; and, with high population growth and insufficient job creation, informality and underemployment have deepened.

Figure 1: Structural change in Madagascar, Cambodia and Vietnam

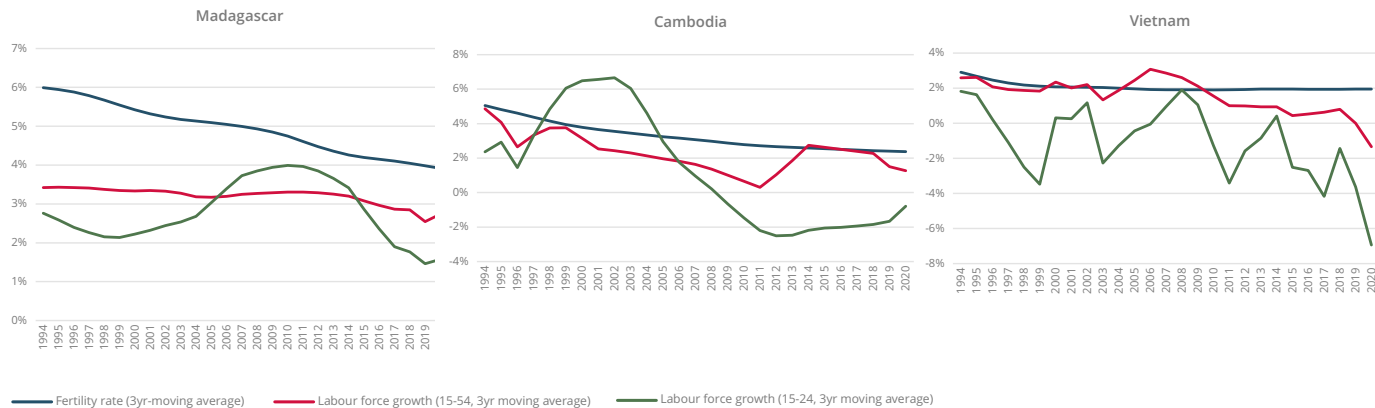
Sectoral composition of the economy



Labour productivity in agriculture compared to minimum-wage levels in apparel export (constant LCU, millions)



Fertility rate and labour-force growth



Source: Marslev and Whitfield (forthcoming).

The best illustration of such divergence vis-à-vis structural transformation is that it took the agricultural sector in Cambodia and Vietnam around a decade to catch up with minimum-wage levels in the apparel-export industry, while the gap has substantially widened in Madagascar between minimum-wage levels in apparel export and value-added in the agricultural sector – going from 15–25 per cent between 2005 and 2010 to 70–80 per cent since 2015 (Figure 1, second row).⁴ These trajectories had different implications for the ability of apparel-export factories to recruit and retain workers. In Cambodia and Vietnam, broad-based income gains in domestic labour markets combined with apparel-export firms' efforts to keep wages low in the context of the supplier squeeze (described in the next section) made jobs in this sector increasingly unappealing. In Cambodia, the minimum wage for apparel export was 50–70 per cent higher than the average value-added

per person employed in agriculture in the early years of the new century; by the early 2010s, however, it was 30 per cent lower, and apparel had the second-lowest average female salary of all branches of the economy, 11 per cent below the national average.⁵ This erosion of a wage premium in apparel export led to labour shortages here, as 56 per cent of employers in the sector had vacancies (Bruni et al., 2013).

In Vietnam, monthly wages in apparel (including overtime, bonuses and similar) went from being 13 per cent lower than the average for the enterprise sector in 2000 to being 32 per cent lower in 2007.⁶ At the same time, the value-added per person employed in agriculture narrowed the gap to average apparel wages from 136 per cent in 2000 to 69 per cent in 2008, catching up with the minimum wage for apparel-export factories in urban areas by midway through the first decade of the new century. Furthermore, apparel wages deteriorated vis-à-vis

⁴ In Figure 1, the minimum wage in Madagascar is economy-wide and thus a national minimum wage. For Cambodia, it is the minimum wage specifically set for apparel and footwear. In Vietnam there is a four-zone system for wages, and what is shown in Figure 2 is the minimum wage for zone 1, which applies to large urban areas where apparel-export factories were located initially; zones 2 through 4 have lower minimum wages but follow the same trend where labour productivity in agriculture catches up.

⁵ Calculated based on value added in agriculture from World Bank WDI, databank.worldbank.org, and employment in agriculture from ILOStat, ilo.stat.ilo.org. Labor Force Survey 2012 (only mining and quarrying, which was marginal in size, had a lower average wage).

⁶ Statistics were calculated based on data obtained from the Statistical Yearbooks of Vietnam, by dividing total compensation by employment in different sectors. This data only covers the enterprise sector, so it may not be representative of the larger rural areas where people are own-account workers or self-employed. It is difficult to obtain comparable data on incomes/wages per employee in the two sectors. The Statistical Yearbooks have data on gross domestic product (value-added) in agriculture and the population engaged in agriculture, from which the value-added per person engaged in agriculture can be calculated.

alternative income sources, especially new industries such as electronics assembly paying higher wages. As a result, by 2006 one-quarter of all foreign-owned enterprises lacked manpower, especially in the main industrial hubs located in the southern part of Vietnam.⁷

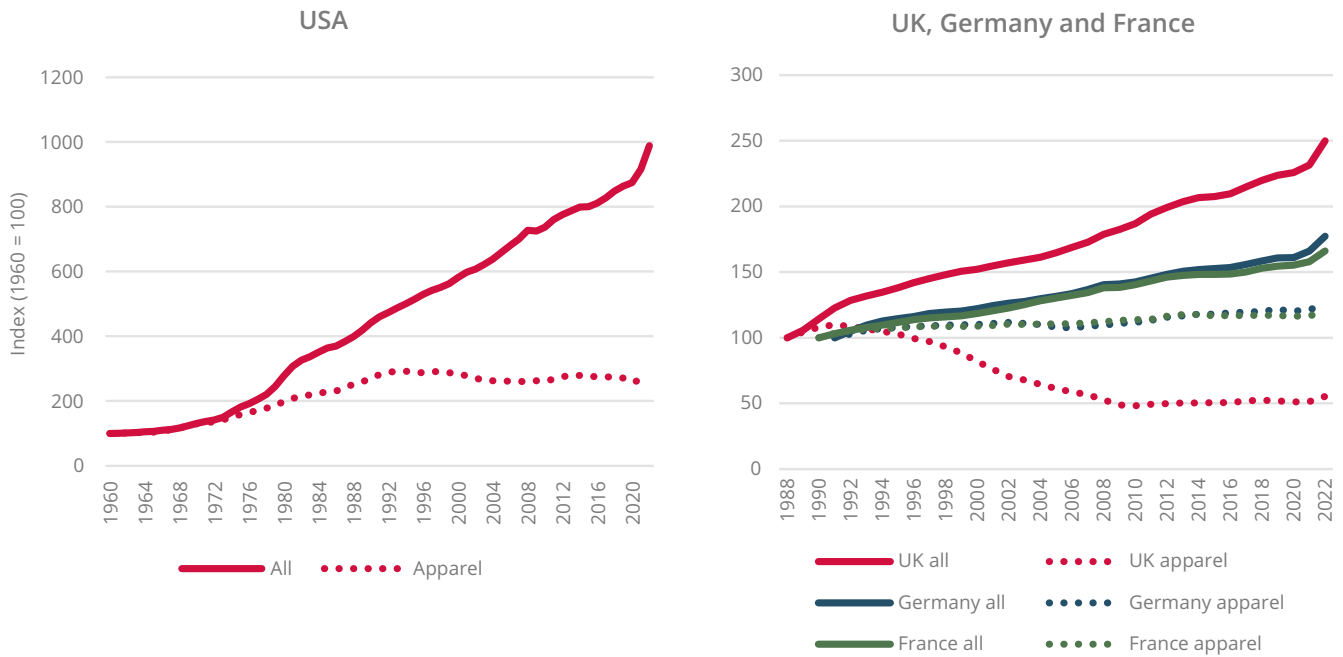
Madagascar's apparel-export sector continued to compare favourably to most alternatives in rural and urban labour markets. Wages in that sector were well below living-wage benchmarks, making work poverty pronounced. However, conditions in most alternative jobs were even worse. ONEF survey data from 2021 shows that four-fifths of workers in apparel-export firms were paid above the minimum wage, while only half of those in domestic apparel and one-quarter of those in cotton farming were. As a result, the share of respondents declaring their belonging to households living below the poverty line was significantly lower among those employed in apparel export (31 per cent) than in domestic apparel (51 per cent) and cotton farming (70 per cent). Apparel-export workers also had significantly better access to material benefits such as medical care, free meals, transport allowances and bonuses (see Marslev and Whitfield, 2023).

3. The supplier squeeze and economic-upgrading constraints in apparel GVCs

Apparel GVCs are dominated by brands and retailers which outsource production to supplier networks, with vast power asymmetries between buyers and sellers and an unequal distribution of costs, risks and rewards. Beginning in the 1980s, intensified competition among Western retailers led to relatively few buyers pushing down prices among many suppliers to maintain their markups without increasing retail prices (Milberg and Winkler, 2013; Taplin, 2014). With the global integration of China and India in the 1990s and the phase-out of the Multi-Fiber Arrangement after the turn of the millennium, the continued reduction of sourcing costs through lowering prices paid to suppliers, and offloading more functions and risks, became the backbone of apparel buyers' accumulation strategies, resulting in a squeeze on suppliers' profitability. These observations are confirmed by consumer-price indices and trade data, which show that price tags have remained virtually unchanged for three decades now in defiance of otherwise inflationary trends (see Figure 2 below). Falling apparel prices at the consumer end were enabled by, and drove, declining export prices in producer countries, as suppliers had to absorb buyers' deflationary pricing policies.

⁷ Viet Nam News, 21 April 2006, 'Foreign firms in need of more blue-collar workers'.

Figure 2: Consumer prices for all items versus for apparel

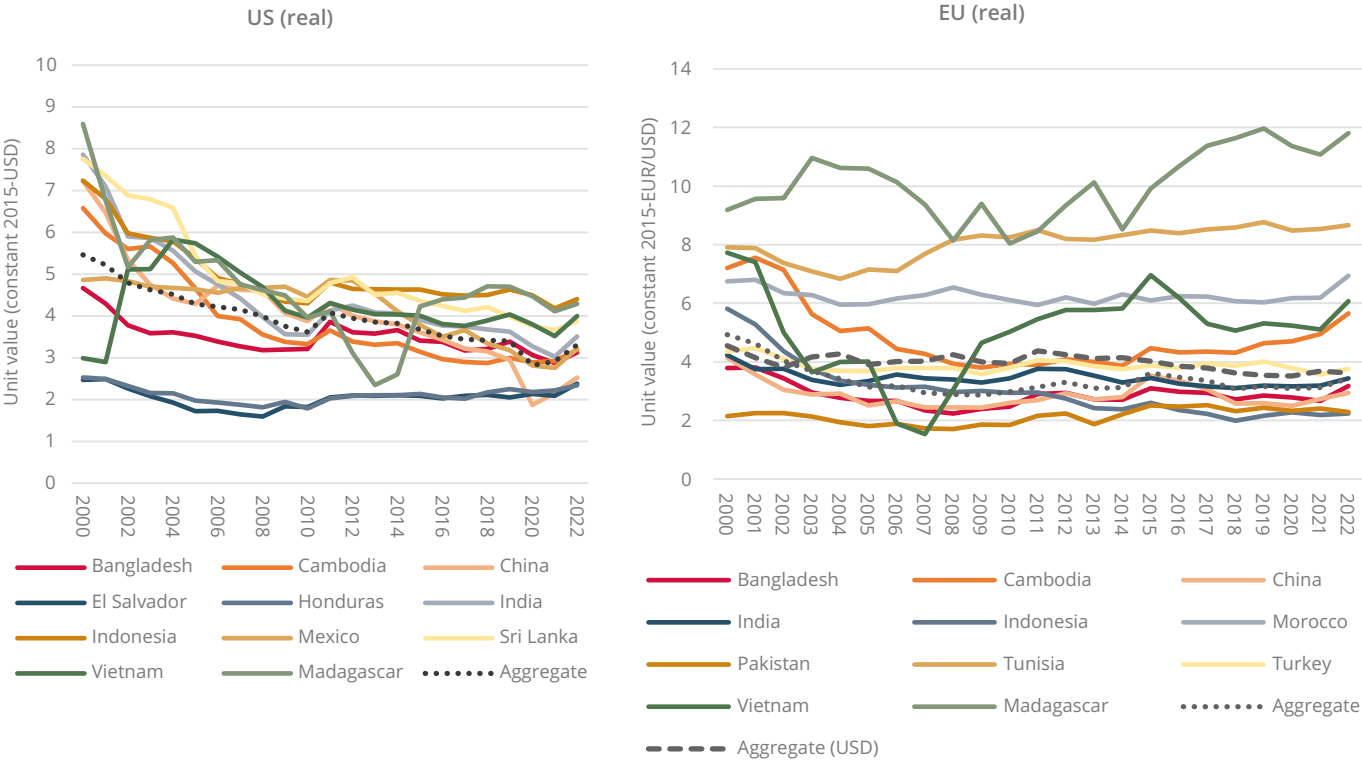


Source: Authors' own compilation, based on data from the Bureau of Labor Statistics (US) and OECDStat (Europe).

Figure 3 below shows the average unit value of apparel imported by the US and the EU from the ten-largest supplier countries to each, with Madagascar added for comparative purposes. In real terms, all ten supplier countries to the US had lower unit values in 2022 than in the early years of the new century, with an average annual decline of 2.3 per cent witnessed between 2000 and 2021. For the EU, real unit values fell for all but Tunisia, Morocco and Pakistan – doing so by an average of 1.1 per cent per year over the same period. Madagascar has among the highest import unit values to both the US and EU markets, but notably a small number of locally owned firms export

smaller volumes of complex products here. Political instability in 2002 led most of the large Asian and Mauritian firms to exit Madagascar, and the remainder left after the 2009 political coup and the country's subsequent loss of preferential market access to the US (which was not reinstated until 2016); by 2020, there were just under 40 firms exporting and none were subsidiaries of the large transnational first-tier suppliers which dominate the apparel-export industries in Cambodia and Vietnam (see Whitfield and Staritz, 2021). Thus, while apparel-export firms in Madagascar can access high prices per product, they export only very small volumes (see revenue figures in Table 1 above).

Figure 3: Unit values of apparel imports to key end markets



Source: Authors' own compilation, based on USITC Dataweb (USA) and Eurostat ComExt (EU).

Notes: The US data only includes products with quantities denominated in the dozens, while that for the EU only includes quantities denominated in pieces. GDP deflators (US and Eurozone) are from World Bank's World Development Indicators. For the EU, it should be noted that the picture may be distorted by the fact that trade statistics are recorded in euros, whereas most transactions between buyers and suppliers of apparel are in US dollars. Converted into the latter, the unit value of EU apparel imports has declined over the past decade.

Based on these observations as well as interviews with apparel buyers and supplier firms, we argue that the market power of global buyers here has led to product-specific 'ceiling prices'. In the global apparel industry, this ceiling price is linked to the 'standard allowed minute' (SAM) – meaning the time permitted by buyers for producing a given item. The SAM is dynamic, set by the most efficient supplier, and it serves as the norm against which other (potential) suppliers are benchmarked. All apparel factories know what the SAM

is for the products they make, as it is given by buyers. A supplier's ability to meet the required price, at a given SAM, hinges on its labour costs per minute, line efficiency and profit margins. Each ceiling price, therefore, has an equivalent 'ceiling unit labour cost': a combined measure of wages (and other labour costs) and efficiency, above which specific items cannot be profitably produced by suppliers. The severity of this price pressure varies by product, market segment, buyer and end markets, but it represents an underlying gravitational force.

Ceiling prices and their respective ceiling unit labour costs constitute a 'moving line' which has shifted downwards as existing producers increased efficiency (driving down SAMs) and new supplier countries with lower wages emerged. This trend is also rooted in the 'open costing' requirements giving buyers full transparency over the efficiency and cost structure of their suppliers, allowing them to stoke competition in, and capture efficiency gains from, their supply base. Theoretically, ceiling prices could shift upwards if wages increased in the most important supplier countries and suppliers were unable to offset this through higher efficiency, in which case buyers would have to absorb higher labour costs into their pricing.

These features of apparel GVCs, especially their power asymmetries and distributional dynamics, influence labour regimes in several ways. The disjuncture between the ceiling prices imposed by oligopsonistic buyers and the tendentially inflationary context in which supplier firms operate acts as a structural profit squeeze on apparel manufacturers, caught between stagnant export prices and rising costs of production (especially regarding labour). This structural profit squeeze (mediated by exchange rates, since output and wages are paid in different currencies) not only compels producers to continuously seek various techno-organisational, product, spatial or other 'fixes' to stay afloat. It also makes profitability fragile and creates incentives to suppress wage increases, skimp on social-security payments or otherwise reduce labour costs (Anner, 2019, 2020). Moreover, there is high capital mobility in apparel GVCs: transnational

supplier firms can relatively easily relocate production within and across countries, and buyers can swiftly shift sourcing locations. This undermines workers' bargaining power, as it makes it difficult for them to be in a 'strategic location' from where they can affect global production.

4. Cambodia and Vietnam: Tightening labour markets and workers' power

Tightening labour markets in Cambodia and Vietnam undergirded successful waves of related protest, with substantial material gains secured herewith. In Madagascar, where labour markets did not tighten, collective action by apparel-export workers was much more muted and they lacked the bargaining power and political influence to wrest meaningful concessions from factories and the government (see Marslev and Whitfield, 2023). Thus, this section explains apparel workers' increased bargaining power in Cambodia and Vietnam, the responses of their governments to higher wages being paid and the choices made by apparel-export firms in light of these greater labour costs.

Cambodia

Cambodian apparel-export workers were among the most heavily unionised and strike-prone in Asia, but they failed to achieve material gains through several rounds of labour protests during the first decade of the new century. As a result, the purchasing power of their minimum wage dropped by 25 per cent between 2001 and 2011. This trend was broken by a wave of protests between 2012 and 2014. To pacify workers and global brands, the government

adopted several minimum-wage hikes, a new wage-fixing mechanism and other benefits such as employer-paid health insurance and higher maternity pay (Arnold, 2017). Apparel-export workers saw their real wages double in five years, edging towards living-wage levels.

This outcome resulted from the confluence of a tightening labour market and changing domestic politics. Labour shortages emerged gradually, but then intensified with a large influx of new investments as the apparel industry recovered from the financial crisis of 2008/2009, amplifying the effects of the strike wave from 2012 to 2014 in a way it had not done previously. Additionally, as the political opposition made higher minimum-wage levels central to its campaign promises regarding the 2013 election, widespread support from apparel workers and their families contributed to the near-defeat of Hun Sen and his Cambodia People's Party (CPP). The CPP had ignored the emerging industrial working class and their interests, drawing its political support from rural areas. But due to its drastic expansion, the apparel workforce had become a crucial voting bloc: it went from making up 1.4 per cent of eligible voters in 1998 to almost 10 per cent thereof in 2013, with one-fifth of all households having at least one member working in an apparel

factory.⁸ After the interests of the industrial working class and political opposition converged in the run up to the 2013 election, the ruling CPP took action to address workers' demands. This included several minimum-wage hikes, alongside efforts to woo apparel workers ahead of the 2018 election with promises of cheaper electricity bills, higher maternity benefits and employer-paid health insurance (Marslev, 2019).

The compressed doubling of wages instigated a crisis in apparel-export factories, where the gross profit margin was cut in half in five years, falling from 19.5 per cent in 2011, to 12.2 per cent in 2014 and then to 8.3 per cent in 2016.⁹ Brands and retailers did not accommodate these wage hikes through setting higher unit prices, or only increased prices modestly, expecting their suppliers to absorb rising labour costs. Apparel-export firms, all of which were foreign-owned, largely responded by increasing production targets (making employees work faster) and allowing fewer breaks and less down time. Some factories introduced labour-saving technologies or moved into more complex products with higher unit prices, but the productivity gains immediately achievable were modest given the level of investment required and the fact that complex products tend to have smaller orders and lower

⁸ Based on apparel employment estimates from the Labour Force Survey 2012 and figures on the number of eligible voters from COMFREL (2017).

⁹ Gross operating surplus calculated as value-added in wearing apparel, textile and footwear (from National Accounts) minus wages (from Ministry of Commerce, obtained from the International Labour Organization) and divided by output (approximated by export value of garment and footwear products [HS 61, 62 and 64] from UN Comtrade), a feasible proxy as virtually the entire output is exported.

efficiency rates, thus cancelling out the higher unit prices.

In addition, the government launched a crackdown on organised labour, threatening lawsuits, intensifying union-busting and overseeing a raft of repressive legislation to undermine workers' collective action, while also pacifying apparel workers through populist concessions. Consequently, minimum-wage hikes in the apparel-export industry declined, but domestic inflation continued to increase. By 2022, as a result, real wages (purchasing power) had returned to 2018 levels, although still being higher than prior to the aforementioned strike wave. Another element of the government's strategy was to partially offset wage increases through concessions to factories, such as reducing export-management fees and delaying taxes – thus reducing benefits to the Cambodian state accruing from the industry.

Vietnam

A similar process unfolded in Vietnam, where apparel-export workers had engaged in strike action for some time without success. This changed with the emergence of labour shortages in the industrial hubs of southern Vietnam. Apparel-export workers' wildcat strikes during the 1990s and early years of the new century mostly failed to secure material improvements. The minimum wage for those employed by foreign-owned firms declined by 20 per cent between 1996 and 2005. In contrast, the strike wave from 2006 to 2012 – led by apparel workers, and reaching almost 1,000 strikes in 2011 alone – resulted in the government raising minimum-wage levels annually, with apparel-export workers' real

wages doubling by 2015 and moving closer to living-wage benchmarks. The ruling party feared that labour protests would spiral out of control and evolve into a movement making wider political demands. The ideological importance of apparel-export workers to the ruling party and their strategic position within the manufacturing workforce, accounting for 9.1 per cent of the employed population in 2010, amplified their bargaining power.

Labour costs more than tripled in nominal terms between 2005 and 2012, but wage increases were more gradual than in Cambodia, which gave firms more time to make investments and develop new business strategies. In key industrial hubs, where labour shortages became systemic and apparel had to compete for workers with new growth sectors, apparel factories invested in labour-saving machines and moved to products with higher unit prices, typically by adding the high-end brands of existing buyers. This strategy was made possible by rising wages in China, which were pushing those more complex products out and creating a space for producers in Vietnam to enter. Another strategy of apparel manufacturers was to relocate factories to semi-urban or rural areas, where wages were lower per Vietnam's four-tiered minimum-wage structure. Factories also turned to new and less price-sensitive export markets in Japan, South Korea and China, and away from the US market.

Vietnam was also more engaged in textile production than Cambodia, because of related investment by foreign firms in the 2010s in response to anticipated new trade agreements. Textile production provided more backward linkages for apparel facto-

ries, as they could source fabric locally and thus reduce the costs and time of importing, allowing them to supply different buyers, products and markets than factories in Cambodia could. Lastly, Vietnam also had more domestic-owned apparel factories than Cambodia, and many of these firms began supplying the home market. Apparel factories which remained active in low-value areas and did not pursue these business strategies resorted to the work-intensification strategy seen in Cambodia instead. The government ratified two out of three outstanding ILO core conventions and a new labour code, but they have not yet been implemented. Real-wage increases in the apparel-export industry slowed down, and during the Covid-19 pandemic even declined, so it remains to be seen whether the material gains for workers will be sustained.

5. Conclusion

The responses of (largely) foreign-owned apparel-export firms in Cambodia and Vietnam to wage increases, as well as the subsequent choices of those countries' respective governments in light of the apparent profitability squeeze on the sector's factories, show that there are limits to the gains which workers can achieve here. The current configuration of apparel GVCs places limits on workers' power. In this context, labour shortages and rising wages in their national economies at large have left their apparel-export firms in a position of declining profitability, as production costs increased but revenues largely stayed the same because of the stagnant prices ensuing from buyers' current decision-making. Thus, wage increases would be followed by

measures to increase labour efficiency, often through work intensification, and to reduce non-wage benefits, while also seeking to move factories to locations with lower labour costs within existing supplier countries. Furthermore, the nature of apparel production places limits on the scope for technological upgrading in that sector, and thus there are limits to the productivity gains which can precede wage increases. Technological change is greater in the textile sector, but this requires higher capital investments.

Ultimately, apparel assembly is a labour-intensive production process, and wages are determined at the scale of GVCs: the efficiency and cost of labour in one country sets the benchmark for all others. Thus, any form of collective action taken by apparel workers will only succeed if it happens across the entire GVC, forcing brands and retailers to pay higher prices to those working in their factories – something we have yet to see. After a certain level of structural transformation is achieved, therefore, countries home to apparel assembly must pursue policies helping develop other industries which have greater potential for technological change and thus can generate higher wages. The asymmetrical bargaining power between buyers and suppliers, combined with limited opportunities for technological innovation in the domain of apparel assembly, undermines these workers' capacity to change their situation. Under this current configuration of apparel GVCs, it is unlikely that due diligence laws passed by European countries or the EU will have much effect. No doubt, the brands and retailers headquartered in these countries will lobby to reduce the strength of such laws as well.

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