

# The Garment Industry in the Restructuring Global Economy

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The apparel industry is one of the most globalized industries in the world. Some garment firms, such as Liz Claiborne, have their goods produced simultaneously in as many as forty countries around the world, including Hong Kong, Taiwan, South Korea, Singapore, the People's Republic of China, Thailand, the Philippines, Brazil, Costa Rica, Portugal, Italy, Yugoslavia, Turkey, and Hungary. Not all apparel firms have such an extensive scope, but nevertheless, we are witnessing the tremendous growth of production by apparel firms (including both manufacturers and retailers) in countries all over the world, and a concomitant rise in global trade.

This volume focuses on the globalization of the apparel industry in the Pacific Rim region. *Pacific Rim* usually refers to all the countries of Asia and the Americas that border on the Pacific Ocean. We have adapted this concept to the actual patterns of apparel production, and we focus on three areas in particular: Asia; the United States; and Mexico, Central America, and the Caribbean (hereafter referred to as the *Caribbean region*). Because the Caribbean is obviously not geographically connected to the Pacific, this choice requires some explanation.

Asia, the United States, and the Caribbean region form an important triangle in apparel production. In this triangle, the United States is the major market for production in both Asia and the Caribbean region. U.S. apparel firms are active in both regions, and Asian firms are increasingly active in the Caribbean region and the United States (see Chapter 2 for a full discussion). Although there has been a small

decline in the dominance of the United States as the chief market, this basic pattern prevails and has shaped the development of all three areas. The Pacific Rim region, as we have defined it, thus forms a relatively integrated region of apparel production and distribution.

The most important omission in this picture is the western European industry. Italy, for example, was the world's second largest garment exporter behind Hong Kong in 1990. Indeed, six western European countries were among the top fifteen apparel exporters. Eighty-three percent of European clothing exports, however, went to other European countries. While 26 percent of western European garment imports came from Asia in 1990, 75 percent of North American garment imports derived from Asia. In 1989 19 percent of Asian garment exports were shipped to western Europe and 40 percent to North America (GATT 1992, 65-66). Asia is thus more integrated with the United States than with Europe, and the Caribbean region is even more so, as we shall see.

Nevertheless, it is important not to reify the Pacific Rim triangle. Firms scour the entire world in sourcing apparel and do not draw any special line around Asia and the Caribbean region. The autonomy and integration of this region is thus only relative and provides a convenient way to limit an already overwhelming topic.

The globalization of the apparel industry illustrates more general trends toward global production. Because the rest of the book focuses solely on apparel, in this chapter we briefly attempt to place the industry within this larger context.

## **Restructuring of the Global Economy**

Global integration, a long-standing feature of the world economy, is currently undergoing a restructuring. Generally, until after World War II, the advanced industrial countries of western Europe and the United States dominated the world economy and controlled most of its industrial production. The less-developed countries tended to concentrate in the production of raw materials. Since the late 1950s, and accelerating rapidly in the 1980s, however, industrial production has shifted out of the West, initially to Japan, then to the Asian NICs (newly industrializing countries—namely, Hong Kong, Taiwan, South Korea, and Singapore), and now to almost every country of

the world. Less-developed countries are not manufacturing mainly for the domestic market or following a model of "import substitution"; rather, they are manufacturing for export, primarily to developed countries, and pursuing a development strategy of export-led industrialization. What we are witnessing has been termed by some a "new international division of labor" (Fröbel, Heinrichs, and Kreye 1980).<sup>1</sup>

The developed countries are faced with the problem of "deindustrialization" in terms of traditional manufacturing, as their manufacturing base is shifted to other, less-developed countries (Bluestone and Harrison 1982). At the same time, they are faced with a massive rise in imports that compete with local industries' products, moving to displace them. This shift is accompanied by the rise of a new kind of transnational corporation (TNC). Of course, TNCs have existed since the beginning of the European expansion, but they concentrated mainly on the production of agricultural goods and raw materials and, in the postwar period, on manufacturing for the host-country market. The new TNCs are global firms that are able to use advanced communications and transportation technology to coordinate manufacturing in multiple locations simultaneously. They engage in "offshore sourcing" to produce primarily for the home market (Grunwald and Flamm 1985; Sklair 1989).

TNCs sometimes engage in direct foreign investment, but globalized production does not depend on it. They can arrange for production in numerous locations through other, looser connections, such as subcontracting and licensing. In other words, TNCs can set up complex networks of global production without owning or directly controlling their various branches.

The nation-state has increasingly declined as an economic unit, with the result that states are often unable to control the actions of powerful TNCs. The TNCs are supragovernmental actors that make decisions on the basis of profit-making criteria without input from representative governments. Of course, strong states are still able to exercise considerable influence over trade policies and over the policies of the governments of developing countries.

Some scholars have used the concept of "commodity chains" to describe the new spatial arrangements of production (Gereffi and Korzeniewicz 1994). The concept shows how design, production, and distribution are broken down and geographically dispersed,

with certain places serving as centers within the chain. Power is differentially allocated along the chain, and countries and firms vie to improve their position in the chain.

Focusing on the geographic aspects of global production also has led to the concept of "global cities" (Sassen 1991). These are coordination centers for the global economy, where planning takes place. They house the corporate headquarters of TNCs, as well as international financial services and a host of related business services. These cities have become the "capitals" of the new global economy.

Another way to view the restructuring is to see it as the proletarianization of most of the world. People who had been engaged primarily in peasant agriculture or in other forms of noncapitalist production are now being incorporated into the industrial labor force. Many of these people are first-generation wage-workers, and a disproportionate number of them are women. These "new" workers sometimes retain ties to noncapitalist sectors and migrate between them and capitalist employment, making their labor cheaper than that of fully proletarianized workers. But even if they are not attached to noncapitalist sectors, first-generation workers tend to be especially vulnerable to exploitative conditions. Thus, an important feature of the new globalization is that TNCs are searching the world for the cheapest available labor and are finding it in developing countries.

Countries pursuing export-led industrialization typically follow strategies that encourage the involvement of foreign capital. They offer incentives, including tax holidays and the setting up of export-processing zones (EPZs), where the bureaucracy surrounding importing and exporting is curtailed; sometimes they also promise cheap and controllable labor. Countries using this development strategy do not plan to remain the providers of cheap labor for TNCs, however: they hope to move up the production ladder, gaining more economic power and control. They want to shift from labor-intensive manufactures to capital-intensive, high-technology goods. They hope to follow the path of Japan and the Asian NICs and become major economic players in the global economy.

Sometimes participation in global capitalist production is foisted on nations by advanced-industrial countries and/or supranational organizations such as the World Bank and the International Monetary Fund (IMF), where advanced countries wield a great deal of influ-

ence. The United States, in particular, has backed regimes that support globalized production and has pushed for austerity programs that help to make labor cheap. At the same time, developed countries, including the United States, have been affected by the restructured global economy. Accompanying the rise in imports and deindustrialization has been a growth in unemployment and a polarization between the rich and the poor (Harrison and Bluestone 1988). This trend has coincided with increased racial polarization, as people of color have faced a disproportionate impact from these developments.

A rise in immigration from less-developed to more-developed countries has also accompanied globalization. The United States, for example, has experienced large-scale immigration from the Caribbean region and from Asia, two areas pursuing a manufacturing-for-export development strategy. At least part of this immigration is a product of globalization, as people are dislocated by the new economic order and are forced to emigrate for survival (Sassen 1988). Dislocations occur not only because global industries displace local ones (as in the case of agribusiness displacing peasants), but also because austerity programs exacerbate the wage gap between rich and poor countries (making the former ever more desirable). Political refugees, often from countries where the United States has supported repressive regimes, have added to the rise in immigration as well. Finally, some immigration results when people move to service global enterprise as managers, trade representatives, or technicians.

In the advanced countries, the immigration of workers has created a "Third World within." In this case, the newly created proletariat is shifting location. These immigrants play a part in the efforts of the advanced countries to hold on to their industries, by providing a local source of cheap labor to counter the low labor standards in competing countries.

In sum, we are seeing a shakeup of the old world economic order. Some countries have used manufacturing for export as a way to become major economic powers (Appelbaum and Henderson 1992; Gereffi and Wyman 1990). These countries now threaten U.S. dominance. Other countries are trying to pursue this same path, but it is not clear whether they will succeed. Meanwhile, despite the fact that the United States is suffering some negative consequences from the

global restructuring, certain U.S.-based TNCs are deeply implicated in the process and benefit from it.

### **Contrasting Views of Restructuring**

The new globalization receives different interpretations and different evaluations (Gondolf, Marcus, and Dougherty 1986). Some focus on the positive side; they see global production as increasing efficiency by allowing each country to specialize in its strengths. Less-developed countries are able to provide low-cost, unskilled labor, while developed countries provide management, technical, and financial resources. Together they are able to maximize the efficient use of resources. The result is that more goods and services are produced more cheaply, to the benefit of all. Consumers, in particular, are seen as the great beneficiaries of globalized production, because of the abundance of low-cost, higher-quality goods from which to choose.

Globalization can be seen as part of the new system of flexible specialization (Piore and Sabel 1984). Consumer markets have become more differentiated, making the old, industrial system of mass production in huge factories obsolete. To be competitive today, a firm must be able to produce small batches of differentiated goods for diverse customers. Globalization contributes to this process by enabling firms to produce a vast range of products in multiple countries simultaneously.

Another aspect of the positive view is to see the entrance of less-developed countries into manufacturing for export as a step toward their industrialization and economic development. Although countries may enter the global economy at a tremendous disadvantage, by participating in exports they are able to accumulate capital and gradually increase their power and wealth. Japan and the Asian NICs have demonstrated the possibilities; now other countries can follow a similar path.

Although workers in the advanced countries may suffer some dislocation by the movement of industry abroad, in the long run they are seen to be beneficiaries of this process. While lower-skilled, more labor-intensive jobs will move to the developing countries, the advanced countries will gain higher-technology jobs, as well as jobs in

coordinating and managing the global economy. Thus workers in the advanced countries will be "pushed up" to more middle-class positions, servicing and directing the workers in the rest of the world. Moreover, as other countries develop, their purchasing power will increase, leading to larger markets for the products of the developed countries. Growth in exports means growth in domestic production, and thus growth in domestic employment.

Those who favor globalization also note its inevitability. The economic logic that is propelling global production is immensely powerful. Technology allows globalization, and competition forges it; there is really no stopping the process, so the best one can do is adapt on the most favorable terms possible. Nations feel they must get into the game quickly so as not to be left behind.

A favorable standpoint on globalization is typically coupled with an optimistic view of the effects of immigration. Like new nations entering the global economy, immigrant workers are seen as having to suffer in the short run in order to make advances in the future. Instead of being viewed as exploited, the immigrants are seen as being granted an opportunity—one that they freely choose—to better their life circumstances. They may start off being paid low wages because they lack marketable skills, but with time, they or their children will acquire such skills and will experience upward mobility.

In general, a positive view of globalization is accompanied by a belief in the benefits of markets and free trade. The market, rather than political decision making, should, it is felt, be the arbiter of economic decision making. This favorable and inevitable view of globalization is by far the most predominant approach. It is promoted by the U.S. government, by the TNCs, by many governments in developing countries, and by various international agencies. This position receives considerable support from academics, especially economists, who provide governmental agencies with advice. It is the dominant world policy.

There is, however, a less sanguine interpretation of globalization voiced by U.S. trade unionists and many academics who study development, labor, women, inequality, and social class (Castells and Henderson 1987; Kamel 1990; Kolko 1988; Peet 1987; Ross and Trachte 1990; Sklair 1989). In general, their view is that globalization has a differential class impact: globalization is in the interests of capitalists, especially capitalists connected with TNCs, and of sectors of

the capitalist class in developing nations. But the working class in both sets of countries is hurt, especially young women workers, who have become the chief employees of the TNCs (Fernandez-Kelly 1983; Fuentes and Ehrenreich 1983; Mies 1986; Nash and Fernandez-Kelly 1983).

Some argue that globalization is part of a response to a major crisis that has emerged in the advanced capitalist countries. In particular, after the post-World War II boom, the economies of these countries stagnated and profits declined; stagnation was blamed on the advances made by workers under the welfare state. Capital's movement abroad, which was preceded in the United States by regional relocation, is an effort to cut labor costs, weaken unions, and restore profitability. Put generally, globalization can be seen, in part, as an effort to discipline labor.

Globalization enables employers to pit workers from different countries against one another. Regions and nations must compete to attract investment and businesses. Competitors seek to undercut one another by offering the most favorable conditions to capital. Part of what they seek to offer is quality, efficiency, and timeliness, but they also compete in terms of providing the lowest possible labor standards: they promise a low-cost, disciplined, and unorganized work force. Governments pledge to ensure these conditions by engaging in the political repression of workers' movements (Deyo 1989).

The disciplining of the working class that accompanies globalization is not limited to conditions in the workplace. It also involves a cutback in state social programs. For example, in the United States, under the Reagan-Bush administrations, efforts were made to curtail multiple programs protecting workers' standard of living; these tax-based programs were seen as hindering capital accumulation. The argument was made that if these funds were invested by the private sector, everyone would benefit, including workers. This same logic has been imposed on developing countries; they have been granted aid and loans on the condition that they engage in austerity programs that cut back on social spending. The impact of such cutbacks is that workers are less protected from engaging in bargains of desperation when they enter the work force.

This view of globalization is accompanied by a pessimism about the policy of export-led development. Rather than believing that performing assembly for TNCs will lead to development, critics fear that



it is another form of dependency, with the advanced capitalist countries and their corporations retaining economic (and political) control over the global economy (Bello and Rosenfeld 1990).

Critics also note a negative side to immigrants' experiences (Mitter 1986; Sassen 1988). They see the immigration of workers as, in part, a product of globalization and TNC activity, as workers in less-developed countries find their means of livelihood disrupted by capitalist penetration. Immigrants are thus not just people seeking a better life for themselves, but often those "forced" into moving because they have lost the means to survive. On arrival in the more-advanced economies, they are faced with forms of coercion, including immigration regulations, racism, and sexism, that keep them an especially disadvantaged work force. Especially coercive is the condition of being an undocumented immigrant. Critics point out that those who favor globalization promote the free movement of commodities and capital, but not the free movement of labor, in the form of open borders. Political restrictions on workers add to the weakening of the working class.

In sum, the critical perspective sees globalization as an effort to strengthen the hand of capital and weaken that of labor. The favorable view argues that the interests of capital and labor are not antagonistic and that everyone benefits from capital accumulation, investment, economic growth, and the creation of jobs. Critics, on the other hand, contend that certain classes benefit at the expense of others, and that, even if workers in poor countries do get jobs, these jobs benefit the capitalists much more than they do the workers, and also hurt the workers in the advanced capitalist countries through deindustrialization.

Where does the truth lie? One of the purposes of this volume is to assess this question in a detailed examination of globalization's effects on one industry in a variety of countries. As we will see, not only do countries' experiences differ greatly, but so do the perspectives and assumptions of the participants in this project. Some are firm believers in free trade, export-led development, and global capitalism. They see tremendous economic growth and the rise of previously underdeveloped countries into powerful actors in the world economy. Others view export-led industrialization as a dead end for some, although not all, countries. They focus on the pain and suffer-

ing of workers, especially women, as they toil in factories and in the underground economy spawned by global capitalism.

To a certain extent, one's point of view depends on geographic location. Generally, Asian countries, especially the NICs, appear to be transforming themselves from dependencies into major actors and competitors in the global economy, leading to an optimism about the effects of globalization. This optimism, however, blots out the suffering and labor repression that is still occurring for some workers in these countries, despite the rise in standard of living for the majority.

On the other hand, the Caribbean region generally faces a harsher reality, in part because the closeness and dominance of the United States pose special problems for these countries. They are more likely to get caught in simple assembly for the TNCs, raising questions about whether manufacturing for export will be transformable into broader economic development. Of course, some in these countries are firm believers in this policy and are pursuing it avidly, but there are clear signs that many workers are severely exploited in the process.

Similar questions can be raised about the later Asian entrants to the global economy. Will they find themselves under Japanese and NIC domination similar to U.S. domination of the Caribbean region? And if so, will they still be able to use this initially dependent position to develop economically and eventually to become global players in their own right?

Other confusing issues remain. For example, do women benefit from their movement into the wage sector (proletarianization) as a result of globalization? A case can be made that working outside the home and earning money gives women new-found power in their relations with men. It can also be argued, however, that these women remain under patriarchal control, but that now, in addition to their fathers and husbands, they are under the control of male bosses. They have double and even triple workloads, as they engage in wage labor, domestic labor, and often industrial homework and other forms of informalized labor (Ward 1990).

The two points of view lead to different politics. Those who hold the favorable outlook advocate working for the breakdown of all trade and investment barriers and to pushing rapidly ahead toward global integration. Critics are not trying to stem these forces com-

pletely, but rather, are attempting to set conditions on them. For example, globalization should be allowed only if labor and environmental standards are protected in the process. Similarly, the rights of workers to form unions should be safeguarded, so that business cannot wantonly pit groups of workers against one another.

## **The Apparel Industry**

This volume focuses on one industry to examine the characteristics and impact of globalized production. Of course, apparel has unique features, although it shares many traits with other industries; concentrating on one industry thus offers only partial insight into the workings of the entire global economic system (see Chapkis and Enloe 1983 and Dickerson 1991 for an introduction to the global apparel industry).

The apparel industry stands out for several reasons. First, it is one of the most globalized industries in the world today; like the electronics industry, it has established a beachhead in virtually every country of the globe. Moreover, apparel is typically the entering industry for countries embarking on a program of industrialization, particularly export-led industrialization. In this sense, apparel production is the cutting-edge industry in the globalization process; it is pioneering global processing. We predict that many of the methods used in the globalization of apparel production will be followed by other industries, and thus the apparel industry may be a portent of things to come.

One of the reasons that countries aspiring to industrialization enter the apparel industry first is that aspects of the industry involve simple technology and hence low startup costs. The basic unit of production remains the individual sitting at a sewing machine. Although some technological strides have been made, sewing continues to be a labor-intensive activity that does not require formal education, so newly proletarianized workers can enter this industry without much advance preparation.

The image of the industry as entirely low-tech is false, however (Hoffman and Rush 1988). The designing, engineering, grading, marking, and cutting phases of production are becoming increasingly mechanized by computer technology, and the planning and co-

ordination of far-flung production units requires highly developed communications and transportation technologies. Thus, a peculiarity of this industry is that it combines the most advanced technology with some of the least developed in the industrial world. The combination of high- and low-tech characteristics lends itself to a system of contracting out the low-tech, labor-intensive parts of production to less-developed countries. In this way, these countries become integrated into the global system of production by engaging in one aspect of the production process, namely, assembly. The electronics industry shares this characteristic with apparel, with labor-intensive assembly also sent to low-wage countries. In electronics, however, offshore assembly tends to be done in subsidiaries of TNCs from the advanced, industrial countries. In contrast, apparel is characterized by arm's-length relationships—especially contracting—in which the TNC neither owns nor necessarily has a long-term commitment to particular contractors or locations.

Because global apparel production can occur without ownership and commitment, the industry enjoys tremendous flexibility. TNCs can shift their production with relative ease to the places and firms where they can get the best deal. As a result, the labor market for this industry is truly the world, and all the countries of the world are put into competition with one another to obtain work in clothing assembly. Other industries may never be able completely to replicate the flexibility that the apparel industry has been able to achieve, but it surely stands as a model for their ideal system of production. Again, we see that the apparel industry may serve as a forecast of things to come.

Because this industry is often the first step in countries' entrance into export-led industrialization, it is also the industry that first encounters the process of proletarianization. Young women, often from rural areas, first encounter wage labor in this industry. The entire complex of problems that such a work force faces, including patriarchal domination, severe exploitation, lack of legal protection, continued domestic responsibilities, homework, and so on, is vividly in evidence in the apparel industry. By studying this industry, we are able to see clearly both the severe social costs of globalization, particularly for those who work at sewing, and workers' efforts to resist oppression. Garment workers exemplify the formidable challenge of

finding ways for international labor to respond to international capital.

Just as the apparel industry represents a point of entry for countries and for their newly proletarianized workers, so it represents a point of entry for immigrant workers to advanced-industrial countries from the developing world (Green 1986; Hoel 1982; Morokvasic, Phizacklea, and Rudolph 1986; Phizacklea 1990; Waldinger 1986). Sewing jobs are often the first work immigrants can find, and conditions in garment-assembly factories in the advanced countries frequently mirror Third World conditions. The organizing of immigrant garment workers poses some of the same challenges as the organizing of garment workers in the developing countries, and both groups face the problem of intense competition among their employers for the assembly work offered by globe-scouring TNCs.

In sum, the apparel industry represents both the most advanced arm of globalization and some of its most negative effects, particularly for women. It is worthy of intensive study not only in its own right, but because it may well predict what lies ahead for many other industries. Therefore, we hope our study contributes to an understanding of globalization in general as well as to an understanding of this particular industry.

The unique feature of this book is that it examines a global industry from the perspective of different countries. We have included scholars from Asia and the Caribbean region, or scholars whose work has focused on these regions, along with those whose major topic of study is the United States. The diversity of vantage points enabled all of us to learn something of the tremendous complexity of the globalization process in this industry.

Although we are interested in the details of apparel production in each country, we placed special emphasis on the linkages between countries. Our guiding questions were: What role has the country played in the development of apparel trade in the Pacific Rim region? How has it been affected by trade regimes such as quotas and the encouragement of offshore processing? What is the role of foreign capital? What part have entrepreneurs from the country played in the apparel industry of other countries? Has the country sent emigrants or received immigrants connected with the apparel industry? What are the conditions of labor for garment workers?

In Part I we describe the globalization of the industry within the

Pacific Rim region and examine the role played by the United States in this process. Parts II and III concern the Asian and the Caribbean regions, respectively, and analyze the experiences of several countries within each of the regions. In Part IV we return to the United States to explore this country's response to the globalization process. Finally, we assess the impact of globalization on economic development and consider the prospects for international labor organizing among garment workers.

### Note

1. Although the theory behind this work has received criticism, the description itself is accurate.

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