CHAPTER V

Textile and Apparel Industry in Karnataka

5.1 Introduction

Karnataka, India’s 7th largest State is quite noted in the field of silk, gold, sandal wood art and architecture. The State has the unique distinction of having the first hydro electric project in Asia, and the first public sector steel plant in the country, and has a rich tradition in enterprise and in industrialization.

Karnataka has evolved a unique new industrial policy of 2001 through which policy decisions are taken for the promotion of industries.

The policy gives thrust on Promotion of industries in backward and rural areas of the state; Encouragement to private sector in power generation; Promotion of export oriented economic zone near Bangalore; Commissioning of single window agency at the State level for speedy clearance.

This policy is in tune with the industrial policy of the Government of India and it gives direction or promotion of various industries in the State.

In Karnataka growth centers have been planned in Dharwad, Hassan and Raichur. Comprehensive infrastructural facilities will be provided in these areas, keeping in view, the various facilities and potential in the State, the State Government has spared no efforts in identifying thrust sectors in the seven areas where it wishes to adopt a strategy for accelerated development.

1. They are – Electronics, Telecommunication and software industries,
2. Agro-food processing, Agro-based and bio-technology industries,
3. ready-made garments and Leather and leather products,
4. Equipment for pollution control.
5. Equipment for non-congenital sources of energy and energy conservation.
6. Sericulture based industries including reeling, twisting, weaving and processing.
7. Export oriented industries.

The Directorate also initiates various studies and also revision of various incentives and concessions to be offered to entrepreneurs. It has also helped them in getting all required clearance including in allotment of industrial land, power, water and any other facilities, sanctions and disburses incentives and subsidies to new industrial investments. Directorate has also commissioned Karnataka Udyog Mithra wherein escort services will be provided to the entrepreneurs. Towards achieving the above, the Government has commissioned a number of organizations like:

- Karnataka State Financial Corporation (KSFC)
- Karnataka State Industrial Investment and Development Corporation Limited (KSIIDC)
- Karnataka Industrial Areas Development Board (KIADB)
- Karnataka State Small Industries Development Corporation Limited (KSSIDC)
- Technical Consultancy Services organization of Karnataka (TECSOK)
- Karnataka State Electronics Development Corporation Limited (KEONICS).
Industrial development of a region is guided by various factors of which infrastructure facilities play a key role, of a catalytic nature. The high positive correlation observed in the case of Karnataka between the infrastructure and industrial development highlights the need for the availability of adequate infrastructure facilities in promoting industry. This aspect attains special importance in the context of ‘New Industrial Policy’ wherein the industry in the liberalized regime has to sustain global competition. Karnataka’s mission is to achieve an economic growth rate of 8 per cent to 9 per cent over the next decade by promoting the rapid growth of a market driven, knowledge based, efficient and competitive industrial sector. This will be done by providing industry access to high quality infrastructure, extending institutional support for technology upgradation, deregulating the administrative framework and catalyzing the entrepreneurial as well as creative capabilities of the human resources.

The present Industrial Policy will therefore aim to achieve an average industrial growth rate of 10 per cent to 12 per cent per year and attractive investments of at least Rs.20,000 Crores per year and create, on an average, employment potential of at least 1.5 lakhs per year.

5.2 Objectives of the Policy of Government of Karnataka:

In achieving this mission, the focus will be on the objectives set out below:

a) Encourage rapid growth of sectors and markets in which Karnataka has strategic advantages

b) Enhance value addition in products and progress through rapid technology upgradation.
c) Enable optimal utilization of capacity of resources in different sectors viz., Agriculture, Horticulture, Animal Husbandry, Minerals and Human Capital.

d) Enable industry to access new markets – domestic and export through new products that meet global standards of quality and competitiveness.

e) Give impetus to knowledge based industries and the service sector.

f) Create market driven environment with the private sector being the primary engine for growth.

g) Provide Industry access to high quality infrastructure

h) Fully tap the potential of the Small Scale Sector and encourage establishment of new tiny and Small Scale Industries, particularly in the rural areas to achieve the twin objectives of employment generation and utilization of local resources.

Towards this end, Government will undertake, through an expert Group, detailed study of the small scale industrial sector in the state to ascertain their present status, problems and prospects and come out with a separate policy on employment generation in the industrial sector which, among other things, would also include a suitable incentives scheme linked to employment generation.

The garment industries in the State are concentrated in Bangalore where some of the largest export houses of the country are existing. Today overseas buyers view Bangalore as an important location for sourcing of garments after Bombay and Delhi. Brand images are being felt in this region
and there is a great potential for production of value added goods. Ready made garment industries are also concentrated in Bellary district. The units in Bellary are specialized in manufacture of jeans and other leg wears for men. The next place of concentration of this industry is Shimoga district followed by Dharwad district as per the information furnished by the Directorate of Industries and Commerce. There is also a concentration of hosiery industry in Belgaum. The district wise distribution of registered readymade garment units in SSI sector in the State is given in Table 11:

Table 11:

DISTRICT-WISE DISTRIBUTION OF READYMADE GARMENTS

<table>
<thead>
<tr>
<th>S.No.</th>
<th>District</th>
<th>No.of Units</th>
<th>Investment on plant and machinery (Rs.Lakhs)</th>
<th>Total Investment (Rs. In Lakhs)</th>
<th>Employment (Nos.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Bangalore Urban</td>
<td>2039</td>
<td>1167.78</td>
<td>17111.24</td>
<td>4577</td>
</tr>
<tr>
<td>2</td>
<td>Belgaum</td>
<td>772</td>
<td>13.99</td>
<td>533.24</td>
<td>2685</td>
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<tr>
<td>3</td>
<td>Bellary</td>
<td>1282</td>
<td>792</td>
<td>1092.18</td>
<td>6144</td>
</tr>
<tr>
<td>4</td>
<td>Bijapur</td>
<td>613</td>
<td>35.17</td>
<td>522.23</td>
<td>3553</td>
</tr>
<tr>
<td>5</td>
<td>Bidar</td>
<td>612</td>
<td>9.45</td>
<td>233.24</td>
<td>2482</td>
</tr>
<tr>
<td>6</td>
<td>Chitradurga</td>
<td>255</td>
<td>5.19</td>
<td>131.62</td>
<td>985</td>
</tr>
<tr>
<td>7</td>
<td>Chikmagalur</td>
<td>334</td>
<td>9.10</td>
<td>157.14</td>
<td>1432</td>
</tr>
<tr>
<td>8</td>
<td>Madikeri</td>
<td>235</td>
<td>4.45</td>
<td>98.23</td>
<td>1292</td>
</tr>
<tr>
<td>9</td>
<td>Dharwad</td>
<td>1595</td>
<td>21.78</td>
<td>425.51</td>
<td>7031</td>
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<tr>
<td>10</td>
<td>Gulbarga</td>
<td>655</td>
<td>12.86</td>
<td>228.86</td>
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<tr>
<td>11</td>
<td>Hassan</td>
<td>300</td>
<td>7.14</td>
<td>150.51</td>
<td>1751</td>
</tr>
<tr>
<td>12</td>
<td>Karwar</td>
<td>204</td>
<td>3.46</td>
<td>101.12</td>
<td>781</td>
</tr>
<tr>
<td>13</td>
<td>Mangalore</td>
<td>584</td>
<td>25.30</td>
<td>573.06</td>
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<tr>
<td>14</td>
<td>Kolar</td>
<td>676</td>
<td>26.72</td>
<td>494.14</td>
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<tr>
<td>15</td>
<td>Mandya</td>
<td>299</td>
<td>8.66</td>
<td>214.44</td>
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</tr>
<tr>
<td>16</td>
<td>Mysore</td>
<td>567</td>
<td>18.16</td>
<td>377.18</td>
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<tr>
<td>17</td>
<td>Raichur</td>
<td>139</td>
<td>13.78</td>
<td>170.13</td>
<td>636</td>
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<tr>
<td>18</td>
<td>Shimoga</td>
<td>1251</td>
<td>15.76</td>
<td>506.48</td>
<td>5442</td>
</tr>
<tr>
<td>19</td>
<td>Tumkur</td>
<td>557</td>
<td>10.42</td>
<td>250.82</td>
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</tr>
<tr>
<td>20</td>
<td>Bangalore Rural</td>
<td>518</td>
<td>15.53</td>
<td>244.66</td>
<td>2268</td>
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<tr>
<td>21</td>
<td>Bagalkote</td>
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<tr>
<td>22</td>
<td>Chamrajnagar</td>
<td>46</td>
<td>2.7</td>
<td>3.97</td>
<td>157</td>
</tr>
<tr>
<td>23</td>
<td>Davangere</td>
<td>111</td>
<td>1.75</td>
<td>25.04</td>
<td>301</td>
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<tr>
<td>24</td>
<td>Gadag</td>
<td>136</td>
<td>1.67</td>
<td>40.78</td>
<td>360</td>
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<tr>
<td>25</td>
<td>Haveri</td>
<td>37</td>
<td>0.70</td>
<td>7.92</td>
<td>98</td>
</tr>
<tr>
<td>26</td>
<td>Koppal</td>
<td>14</td>
<td>3.11</td>
<td>3.11</td>
<td>34</td>
</tr>
<tr>
<td>27</td>
<td>Udupi</td>
<td>36</td>
<td>7.64</td>
<td>90.39</td>
<td>281</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>13917</td>
<td>1518.62</td>
<td>23804.48</td>
<td>113164</td>
</tr>
</tbody>
</table>

Source: Directorate of Industries and Commerce, Govt. of Karnataka, Bangalore
Field studies have showed that there are approximately 40,000 readymade garment-manufacturing units in India. Around thirty five million people are working in the industry. Many leading world fashion labels are being associated with Indian products. India is being looked upon as a major supplier of high quality fashion apparels, which are being appreciated in major international markets. The credit for this goes to our garment exporters. However, till today our clothing industry is dominated by subcontracting and consists mainly of small units with a few machines of medium quality, relatively high fashion, but small volume business. Thus the need of the hour is to enlarge both manufacturing as well as the marketing base. Tapping new markets especially Central Africa, CIS, East European Countries, Latin America, Australia and South Africa is also essential for growth and development of Indian garment industry.

5.3 Plight of Women Workers in Garment Industry

India’s ready-made garment industry, contributing to around 16 percent to total export earnings, is the largest foreign exchange earner in the country. Most of the growth in this industry occurred since the decade of the 1980s. The value of garment exports, which was only $2 million in 1960-1961, sharply increased from $696 million in 1980-1981 to $2,236 million in 1990-1991, and to $4,765 million in 1999-2000. The economic importance of the garment industry has, thus, increased phenomenally since the introduction of economic reforms in 1991. Karnataka is one of the states where the garment industry is witnessing a rapid growth. In Karnataka, a majority of the garment manufacturing units are located in Bangalore City. According to the figures
provided by the Department of Labour, GoK, Bangalore, the total number of garment manufacturing units located in Bangalore city was 958 in July 2006. The number of workers in these 958 units was 2,95,943; of them, 84.3 percent were women workers. Thus, female workers constitute a major share of the workforce in the garment industry in the state capital.

Working hours and overtime:

Chapter VI Sec 51 of the Factories Act, 1948 says that "No adult worker shall be required or allowed to work in a factory for more than forty eight hours in a week" and Sec 54 adds that "no adult worker shall be required or allowed to work in a factory for more than nine hours in any day". Where a worker works in a factory for more than nine hours in any day or for more than forty-eight hours in any week, he/she shall, in respect of overtime work, be entitled to wages at the rate of twice his ordinary rate of wages. In reality every garment worker ends up working for nine to ten hours daily and this is not always recorded as overtime work.

Wages

The statutory minimum wage in Karnataka for the year 2007-08 ranged from US$ 2.53 for highly skilled workers to US $2.35 for unskilled workers in Zone I. For Zone II and III wages varied from US$ 2.5-2.3 and US$ 2.48-2.27 respectively. Wages for Zone IV ranged from US$2.37 for highly skilled workers to US$2.11 for unskilled workers. (Zone I- Bangalore City Agglomeration Area, Zone II- District Headquarter Agglomeration Area, Zone III- Town Municipal Area, Zone IV- Other than places mentioned in Zone I, II, III ). The average monthly wage of the workers interviewed is somewhere around Rs. 3200/ (US$ 80.08). Out of this income they have to pay their
house rent, provide for children's education, meet household and medical expenses and also provide for occasional social expenses like festivals. Most of the garment workers have only one source of income, i.e. their wages from the garment factory work. Their men folk are in low paid, unprotected, irregular jobs. Workers find it difficult to run a family with this income.

Work shifts and transportation:

An amendment to the Factories Act of 1948 in 2005 allows women employees to work night shifts. This amendment lays down that night shift for women shall be allowed only if the employer ensures safety, adequate safeguards in the factory as regards occupational safety and health, equal opportunity for women workers, adequate protection of their dignity, honour and transportation from the factory premises to the nearest point of their residence. Employers need to take prior permission from the labour department for employing women in night shifts.

Women workers in the garment sector do not do night shifts in Bangalore. They are allowed to work latest till 7.30 pm whereas men workers may work in the night shifts as well. Garment workers do not take their work home. There are a few factories which provide for transport to and from the factory. One third of the interviewees said that they can make use of this facility. Others walk or use public transport to get to their factories. Those who walk on an average cover nearly three kilometres every day to go to work.

The promulgation of Employees' State Insurance (ESI) Act, 1948 envisaged an integrated need based social insurance scheme that would protect the interest of workers in contingencies such as sickness, maternity, temporary or permanent physical disablement, and death due to employment
injury resulting in loss of wages or earning capacity. The Act also guarantees reasonably good medical care to workers and their immediate dependants.

Employees' benefits

Women workers get a maternity leave of three months, wages for this period are fully paid by the ESI. Women with infants do not get extra time to feed their children in the factory premises. They leave their child at home as very few factories have crèches. Women workers are not allowed to come late or go early or take longer breaks to attend to their infants. These women feel that they could produce and earn more if their children were cared for in a work-place crèche while they are at work.

Workers are entitled to fourteen days leave in addition to Sundays and national holidays. In reality workers find it very difficult to avail leave. Workers said that it was only in the case of dire emergencies that the factory management gave them leave on normal working days. One of the workers said that their wages are deducted if they take even a day's 'unauthorized' leave.

Health and safety

Most of the workers said that the workplace is safe and well ventilated. There are enough windows for fresh air and fire extinguishers are in place. But long hours of sitting take a toll on their health. Nearly half of the respondents complained of backaches and breathing problems because of the work they do. Workers also complained of occasional incidents of injury from needles. Very few workers get masks to wear during work. Illnesses like asthma and other respiratory problems, backache, weak eye-sight, piles and anaemia are very common among the garment workers.
Workplace harassment

Workers have to meet hourly production targets of around 150 pieces per hour depending upon the particular style that is being produced at the moment. If they lag behind in meeting targets they have to bear yelling and shouting by their supervisors. Hourly production targets are set way higher than what a healthy worker of average skills can produce. Workers have to speed up their work to very stressful levels to meet targets. Very often they skip their lunch and work during the lunch break (workers are given half an hour for lunch break) to escape the wrath of supervisors.

Women workers are also susceptible to sexual harassment at the work place, workers express this subtly and not explicitly. Supervisors pass comments with sexual overtones. Workers do not react to avoid further harassment and termination. Not many workers take the courage, understandably so, to speak up to higher managers when they feel uncomfortable with the supervisors' behavior.

5.4 DESCRIPTION OF THE CLUSTER

Garment industries in Bangalore started from the period of British. M/s. Bangalore dressmaking Co. was the first unit, started to manufacture garment in Bangalore during 1940, which was started by Mr. Vittal Rao. During the rule of British, there was a need of clothing dress materials. This led to the development of R.M.G industries in Bangalore. Apart from RMG industries, there were silk weaving industries in Bangalore, which led to the development of silk exporters also. After India's independence in 1947, the industries started picking up slowly to cater the needs of dresses of the
common man and local market. The industry started flourishing. Most of RMG industries are concentrated in Bommanahalli and Peenya industrial estate. After the dereservation of garments, big players like Mafthlal, Aravind Mills, etc. started entering the field and occupied places in the sector which indirectly affected the small scale sector. There are about 2500 RMG units in and around Bangalore. Most of the buying agencies in the world have established their branch office in the city. Apart from this, Apparel Park, at Doddaballapur has started functioning in a big way. Some of the leading exporters like Gokaldas Images, Raymond, Pooja garments, have already taken the plot for their units in the apparel park. There are 28 garment units including processing industries have taken the plots. This has contributed in a big way to the development of clusters of RMG industry. In India, RMG units are concentrated in the cities like Delhi, Mumbai, Kolkata, Bangalore, Chennai, Jaipur, Tirupur, Ludhiana. There is a difference in the end products manufactured at Bangalore and other places. RMG are mainly made for export house. There are many SSI units mainly doing job work providing supports to the SME like GE, Aravind fashion, Sonal Holding, Texport Syndicate units in the cluster. The technology and manufacturing process are same as used in other regions.
Defining various Sub-activities

The process of garment manufacturing comprises of following main operations:

Designing and sampling
As per customer sample

Raw Material  Pattern Making

Grey Cloth

Bleaching or Dyeing or Printing

Finishing

Cutting of Components

Fabrication

Value Added (Embroidery & Needlework)

Finishing

Checking

Packing & Forwarding
Defining various Sub-activities

The process of garment manufacturing comprises of following main operations:

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Finishing

Cutting of Components

Fabrication

Value Added (Embroidery & Needlework)

Finishing

Checking

Packing & Forwarding
Current Output

There has been increase in the number of RMG units in Bangalore since 1990. At present there are about 1002 active readymade garment manufacturers and exporters, still number is likely to increase as per the reports of apparel park at Doddaballapur, near to Bangalore. Karnataka Industrial Area Development Board is in the process of acquiring the lands for the further expansion of the park. There are about 1600 fabricators who are doing job work for these exporters, apart from domestic market needs. There are 50 embroidery units who are supporting these units for value addition. As per the reports received from AEPC, total export upto December was around Rs.3050 Crores. Total output from this cluster is about 3500 crores of which about 3000 crores are exported and rest are consumed in the domestic market. Broad sub grouping of the products is as follows:

1. Readymade garments for Gents, : 60%
2. RMG for ladies : 30%
3. RMG for kids : 10%

Geographical Indication

Development of RMG units in Bangalore was started in the year 1970 onwards by leading exporters like Gokaldas export, Ashoka export, Gokaldas Images, continental exports, Leela Fashions, Bombay Rayons etc. Later, small industries (fabricators) were started by taking the orders from large scale. Most important reasons for developments of RMG is the availability and sourcing of export fabrics from places like Salem, Erode, Coimbatore which are nearest to Bangalore (About 5 to 7 hours journey). The other reasons, which contributed for the development of industries, are also as follows:
Availability of space:- Space is no bar around Bangalore for the development of industries. There are 10 industrial estates developed by KSSIDC. KIADB is also providing the necessary support by giving plots to the industries for construction. Apart from this there are private industrial estates, which are supporting the growth of industries, and further garment complex has been constructed at Rajajinagar exclusively for garment industries. Land and sheds are available in Bommanahalli and in and around peenya.

Availability of raw material: - Fabrics, which are required for these industries are available from Salem, Erode, Chennai, Mumbai, and Ahmedabad and also from local suppliers (Agents). There is no problem in this area, which is helping the industries in a great way. There is no weaving or spinning mills in and around Bangalore. Hence all the exporters are sourcing fabrics from other places, as said above.

Skilled labour: - Low-income group of family adopted tailoring as the main source of income for their livelihood. Tailors were abundantly available in the city. Some of the leading training institutes also helped in this area by contributing (trained) skilled labours. This is the main factor that led to growth of this industry. But recently during the visits it is found that there is severe scarcity of skilled labours and machine operators, which has affected production schedule heavily. This has to be taken up very urgently to avoid the cancellation of export orders as suggested by the units.

Existence of airport/cargo container depot/infrastructure:- Bangalore being the Silicon valley of India has all the facilities of handling passengers and presence of cargo container department further facilitated the growth of
the cluster. Presence of high way NH-4 and 7, ring road connecting the industrial estates, road transportation within the city facilitated the growth of the industries. One of the most important factors is the proximity of Chennai Port/international airport to this city. This helped a lot to the industries for transporting the goods quickly. This has really contributed in flourishing the export import business not only for RMG Enterprises but also for those involved in other trades. Union Ministry of state for Road Transports and highways has announced that construction of four lane elevated expressway between Bangalore and electronic city will be commenced during current financial year. This will further add support for the exporters for quick movement of goods. Apart from this international airport is in progress at Devanahalli, near to Bangalore (30Kms).

Flexible specialization: - The entrepreneurs in the cluster are capable of manufacturing wide range of garments with different designs, different materials, different sizes etc. Subcontracting arrangements have made the manufacturing more flexible and specialized. The cluster can handle huge orders. Most of the buyers in the world have their branch offices in the city. Entrepreneurs can easily approach them for suggestions and advice. This is most important in terms of time and delivery.

Entrepreneurship: - Bangalore is well known for these enterprises. Since Bangalore is a metropolitan city and no language barrier. It is also noticed that most of the owners of the garment industries are from North India. Officers and skilled workers are local and some of them are from neighboring states. Growth of these industries resulted due to weather
condition of the city, which was pleasant and cool. As a result most of the
industrialist from North settled in Bangalore and established RMG units. Apart
from these, leading textile mill manufacturers opened dealers/trader for
supplying fabrics like Century Mills, Aravind mills, Nahar mills etc. All these
have contributed for the emergence and growth of RMG clusters in
Bangalore. The main drawbacks of these entrepreneurs are that they work in
isolation from each other because of trade secrets. Garment is designed
according to the sample supplied by buyers. The counter sample is prepared
and all the components and raw material details are recorded. Then costing
part of the garment is done at the sample stage. After getting the approval
from the buyers and also for the cost, raw material is procured and processed
according to the requirements in the textile processing mills. Then according
to design and size, patterns are prepared. The fabrics are cut according to the
pattern and stitched. The value-added work like embroidery is done either
before or after stitching operation, as per sample. The goods are checked for
measurements and packed for forwarding to final destination. There are so
many items produced under the name of readymade Garments. Process of
manufacture of each item varies from each other that detailed manufacturing
process of all the product cannot be given in this report. The common process
of manufacture is given below: -
Cutting of Cloth
↓
Stitching
↓
Embroidery work
↓
Cutting of threads
↓
Checking and passing
↓
Washing/Dry Cleaning
↓
Pressing/Ironing
↓
Checking
↓
Packing

CORE CLUSTER ACTORS

Readymade Garments – Main stream of Bangalore

The economy of Bangalore is inextricably mixed up with that of readymade garment industry. 30% of the Readymade Garments of the country are made in this region. This is 3rd biggest readymade garment manufacturing cluster in the country. Till 1990 the business performance of this cluster (mainly exports) and the emergence of new units kept on increasing steadily. However, after 1990 till 2000 the effect of liberalization was slowly felt and the level of competition kept on intensifying. During 2000-2003, around 30% of units were closed due to lack of orders and
competitions. Other units are running well but still some of the units are planning to close down due to financial, marketing and labour problems, which was revealed during the visits.

5.6 Structure of the Industry.

The ready-made garment industry can be categorized as under –

Category – 1: - The buying houses, which procure direct export orders and then distribute the orders in the clusters and export products to various countries, are in this category. The buying houses depute their representatives for ensuring quality and timely delivery etc. This chain has contributed lot for development of the industries. Some importers also place the orders directly to the manufacturing exporters of the ready-made manufacturers. There are 50 such buying houses in the cluster.

Category –2: This group comprises the manufacturers of RMG and exporters and exporting directly to various countries. The Apparel export Promotion Council releases quota and monitors various issues including quota for these units. These units play a major role in production of garments in the sectors. Apart from their own production arrangements, they are also dependent on fabricators who are doing job work for them (stitching etc). There are about 800 such units exist in the cluster.

Category- 3: - Fabrication of garment is the main activity of the ready-made garment industries. The big houses/exporters provide the cut material/components to these fabricators and these fabricators stitch the garments and send them back to the main units for further processing. Fabricators are being paid on piece rate basis. These units are located in and around cluster. There are about 1600 number of units working as fabricators.
Category – 4: This group is the machine embroidery group. They do machine embroidery on cloth or on cut components using Indian and imported computerized automatic embroidery machines. They play a vital role in value addition to the main products. There are about 50 units in and around the cluster.

Category – 5: This group comprises processing units for fabric. They’re only 4 major processing units in Bangalore, which are overloaded with work. There are about 50 small-scale processing units supporting this cluster in this field. Out of the 4 processing units, 2 units produce the fabric and also process them as per the requirement of the RMG units/exporters. These processing units are well equipped with most modern machines and testing labs. Productions are maintained as well planned and quality is monitored at every stage and very accurately. There is a demand for processing mills/units and sometimes exporters get processed fabrics outside Bangalore due to lack of processing mills.

Category – 6: This group comprises of dealers, merchants, traders, manufacturers/agents of fabrics, threads, button, other accessories etc in the cluster. Only a few number of these groups sell their products directly to the manufacturers of RMG units. Most of them sell their products through dealers. These dealers first get the sample approved, procure the order and then place order with the manufacturers of the fabric and other materials. Finally, they supply finished products to the exporting house/manufacturers as per the demand. There are sufficient traders, suppliers located near the cluster.

Category – 7: In this category, there are suppliers of machinery, tools, machinery repairers, manufacturers and supplier of packaging materials and
other inputs. In case of machinery, there are few Indian made but they are not suitable for high-speed production, hence all the exporters/manufacturers are importing from China, Taiwan, Korea, and Japan. There is a need in this area where Indian technology has to be developed and also to prevent foreign exchange. The exact number of these entrepreneurs is not known but they are sufficient in number to cater to the needs of the cluster.

In order to understand the male-female composition of workers, it is essential to understand the production process adopted in this industry (Chart 1). As can be seen from Chart 1, the production process is elaborate. The phenomenon of outsourcing is dominant in Bellary, while the whole production process takes place, by and large, within the factory premises in Bangalore. The merchant manufacturers normally control the process of cutting, quality checking and packing. They employ mostly experienced men in this process. On the other hand, garmenting and ironing are the two processes where the maximum proportion of the workers in the industry are employed. While the proportion of women is higher in garmenting, that of men is higher in ironing.

Thus, although women constitute a majority of the workers in the garment manufacturing, most of them are involving in garmenting. Let us now analyze the primary data to review the situation of garment workers by looking at their profile, wages paid to these workers, their working conditions and facilities that are made available to them. These issues have been discussed in the following sections.
Chart 1: Production Process of the Garment Industry

Merchant Manufacturers
(procedure order through subcontractors or on their own)

Cutting
(in-house or outsourced)

Garmenting
(outsourced or in-house)

Washing or Bleaching or Dying (outsourced)

Trimming and Checking
(in-house)

Ironing
(outsourced or in-house)

Packing
(in-house)

Work Involved:
- Sewing
- Eye Khaja, Button Hole
- Plain Khaja, Button Hole
- Bar Track
- Over Lock

Distribution of garment workers (%) by type of work and their sex:

<table>
<thead>
<tr>
<th>Name of City</th>
<th>Type of Work</th>
<th>Sex</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Male</td>
</tr>
<tr>
<td>Bangalore</td>
<td>Tailoring</td>
<td>14.29</td>
</tr>
<tr>
<td></td>
<td>Knitting</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Checking</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td>Ironing</td>
<td>20.00</td>
</tr>
<tr>
<td></td>
<td>Helpers</td>
<td>5.00</td>
</tr>
<tr>
<td></td>
<td>Others</td>
<td>33.33</td>
</tr>
<tr>
<td>Bellary</td>
<td>Tailoring</td>
<td>35.48</td>
</tr>
<tr>
<td></td>
<td>Cutting</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td>Ironing</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td>Others</td>
<td>50.00</td>
</tr>
</tbody>
</table>
There are two types of factories in Bangalore city. The first type is in the one, which pays minimum wages and provide social security benefits to workers. These factories provide work contracts, which also mention the benefits to be paid to the workers. The second type of factories frequently violates the minimum wage and social security norms. Further, the work contracts mention the duration, and impose conditions that workers can be removed if they do not meet the targets. There is no reliable data on the composition of the industry by these two types. But, the discussions with workers, trade unions and the government revealed that the first category is becoming important in Bangalore. The reason attributed for this is the growing importance of the industry in term of exports, and the need to maintain certain labor standards. Further since the rapid growth of the industry has resulted in tightening of the labor market, the units have to keep the workers. For this reason, they pay minimum wages and provide social security benefits.

The following Labour Laws/Rules are applicable to the Garment Industry:

- The Industrial Employment (Standing Orders) Act, 1946
- The Industrial Employment (Standing Orders) Rules, 1946
- The Payment of Wages Act, 1936
- The Payment of Wages Rules, 1937
- The Payment of Wages (Amendment) Act, 2005
- The Minimum Wages Act, 1948
- The Minimum Wages (Central) Rules, 1950
- The Payment of Bonus Act, 1965
- The Payment of Bonus Rules, 1975
- The Factories Act, 1948
- The Factories Rules, 1969
• The Contract Labour (Regulation & Abolition) Act, 1970
• The Contract Labour Regulation Rules
• The Workmen's Compensation Act, 1923
• The Workmen's Compensation (Amendments) Act, 2000
• The Employees' State Insurance Act, 1948
• The Employees' Provident Fund & Miscellaneous Provisions Act, 1952
• The Employees' Provident Fund & Miscellaneous Provisions (Amendment) Act, 1996
• The Payment of Gratuity Act, 1972
• The Payment of Gratuity Rules
• The Bonded Labour System (Abolition) Act, 1976
• The Child Labour (Prohibition & Regulation) Act, 1986
• The Children (Pledging of Labour) Act, 1933

The Government of Karnataka has fixed minimum wages by various types of work carried out by those employed in the garment manufacturing in different zones. These minimum wages are also periodically reviewed. The minimum wages fixed by the Government of Karnataka for various types of work in the garment industry in Bangalore and Bellary cities are presented in Table 12:

Table 12:

Minimum wages as fixed by the Government of Karnataka

<table>
<thead>
<tr>
<th>Category of Work</th>
<th>Bangalore</th>
<th>Bellary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tailored (Skilled)</td>
<td>94.76</td>
<td>93.76</td>
</tr>
<tr>
<td>Cutting Machine Operator (Skilled)</td>
<td>94.76</td>
<td>93.76</td>
</tr>
<tr>
<td>Ironer (Semi-skilled)</td>
<td>93.26</td>
<td>89.26</td>
</tr>
</tbody>
</table>

Source: GoK (2006)
In Bangalore, the work conditions are better especially in the case of registered factories. The workers mentioned that the facilities of crèche, ayah, playing equipment, etc. were provided to them. The facilities of drinking water and toilet were also made available within the factory premises. It should be however noted that these facilities were not uniformly provided in all the factories. The focus group discussions with the workers revealed that only in three out of every four factories such facilities were provided in Bangalore.

A major problem faced by the workers has been the targets fixed by employers. Different targets were fixed for different types of the work. It appears that their targets are stiff (generally 3-4 times the capacity of the worker) and cannot be achieved by anyone. According to the workers, even employers are aware of this. Even then, such stiff targets are fixed to have effective control on workers. The modus operandi is as follows. The work contract handed over to the employees incorporates the clause that the targets fixed by employers should be met and that factories can remove workers if they frequently fail to meet the targets. This imposes an enormous burden on workers especially women since they can only be involved in tailoring jobs and they cannot undertake other non-farm activities. Second important feature of the targets is that the targets are fixed and enforced by men in the units. These two features of targets are particularly disadvantageous to women workers. If a worker is not able to achieve targets in a day, she/he is asked to complete the work during the extra time. While men often stay back to complete the work, women cannot do that because of the difficulties involved in late night travel, need to participate in domestic
chores and sanctions imposed on them by spouses or parents. This imposes burdens on them, and results in their early exit from the industry.

The monitoring of targets by men seems to be posing a lot of problems to the women. The men who monitor the target achievement almost on an hourly basis, abuse workers for the slacking, which is bound to happen given the stiff targets. The abusive language often assumes gender connotations in this industry. If newly married women slack, reference will be made to the "activities of the bed the previous night". If a young girl slacks, the male supervisors use the language of enquiring whether they have had pre-marital sex. If a woman often visits the toilet, the reference will be to menstruation. Unable to bear this, several women simply leave their jobs, although minimum wages are paid and statutory benefits are provided.

The women also informed that they cannot voice these problems due to fear of losing their job and the lack of trade unions among them. In fact, some of the factories remove women if they come to know that they are interacting with trade unions. The workers informed that some of the women, unable to bear the fear of losing their jobs, resort to "adjusting with male supervisors". Further probing revealed that male supervisors expect women to meet their emotional and physical needs. If a woman becomes a victim of meeting such needs, the treatment will usually be different. But, such women face enormous psychological and emotional problems that they often leave the job.

The need to upgrade skills through HRD intervention in this sector is of paramount importance, in order to improve their socio-economic conditions vis-à-vis productivity. If appropriate support mechanisms are provided, a
chores and sanctions imposed on them by spouses or parents. This imposes burdens on them, and results in their early exit from the industry.

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The need to upgrade skills through HRD intervention in this sector is of paramount importance, in order to improve their socio-economic conditions vis-à-vis productivity. If appropriate support mechanisms are provided, a
large part of the growing labour force can be absorbed. Thus, promotion of productive and remunerative employment is a key strategy to overcome women's poverty.

The cost of developing the Human Resource is generally kept low in view of the fact that employee turnover is very high. Nevertheless, many Garment Companies are of the firm opinion that investing on the development of Human Resource certainly enables them to keep the employee turnover under check. It is also true that these Companies have realized that:

1. Training, unlike experience can shorten the time required to reach maximum efficiency;
2. Cost of training is much less than the cost of gaining experience, particularly if one is dealing with expensive equipment/material.
3. The results of experience can sometimes be accidental, particularly when experience depends solely on trial and error.
4. The element of predictability is far less when compared to the outcome of a well conceived and conducted training programme.

Training thus provides certain advantages which are not available by learning through experience.

Garment Companies in Bangalore mainly depend on women workforce which provides employment for women who constitute more than 85% of the work-force. According to statistics available with the Labour Department of Karnataka, Bangalore is having 1002 Registered Garment Companies employing 3.98 lakh workers out of which, 3.38 lakh workers are women. If the unregistered ones are also considered, the number may reach 1200 with around 5 lakh workers. Based on the available statistics, the
garment companies have been classified into large, medium and small, and stratified judgment sampling has been adopted for drawing the samples. Accordingly 20 garment companies have been randomly selected and 20 women employees from each company are considered. Interview schedules and questionnaires have been used for collecting the data. Separate structured schedules have been prepared for the women employees and the employers.

With a view to maintaining confidentiality of the selected garment companies, they have been given code numbers – GC-01 to GC 20, which have been classified as Large, Medium and Small Scale garment Companies as per the MSMED Act 2006.
### TABLE 13

**Particulars of the Year of Establishment, Location, Number of employees, Investment**

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Garment Company</th>
<th>Year of Establishment</th>
<th>Location</th>
<th>Present Strength</th>
<th>Investment (Rs. In Lakhs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GC 01 (L)</td>
<td>1984</td>
<td>Yeshwanthpur</td>
<td>1900</td>
<td>12000</td>
</tr>
<tr>
<td>2</td>
<td>GC 02 (L)</td>
<td>1990</td>
<td>J.P. Nagar</td>
<td>1780</td>
<td>9000</td>
</tr>
<tr>
<td>3</td>
<td>GC 03 (L)</td>
<td>1986</td>
<td>Peenya</td>
<td>1210</td>
<td>8800</td>
</tr>
<tr>
<td>4</td>
<td>GC 04 (L)</td>
<td>1988</td>
<td>Yeshwanthpur</td>
<td>2552</td>
<td>10000</td>
</tr>
<tr>
<td>5</td>
<td>GC 05 (L)</td>
<td>1999</td>
<td>Yeshwanthpur</td>
<td>2212</td>
<td>9800</td>
</tr>
<tr>
<td>6</td>
<td>GC 06 (L)</td>
<td>1996</td>
<td>Peenya</td>
<td>2100</td>
<td>6000</td>
</tr>
<tr>
<td>7</td>
<td>GC 07 (L)</td>
<td>1997</td>
<td>Peenya</td>
<td>1900</td>
<td>7500</td>
</tr>
<tr>
<td>8</td>
<td>GC 08 (L)</td>
<td>1998</td>
<td>Peenya</td>
<td>1600</td>
<td>6000</td>
</tr>
<tr>
<td>9</td>
<td>GC 09 (L)</td>
<td>1999</td>
<td>Peenya</td>
<td>1550</td>
<td>6500</td>
</tr>
<tr>
<td>10</td>
<td>GC 10 (L)</td>
<td>1986</td>
<td>Yeshwanthpur</td>
<td>1400</td>
<td>6000</td>
</tr>
<tr>
<td>11</td>
<td>GC 11 (M)</td>
<td>1990</td>
<td>Mysore Road</td>
<td>900</td>
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<tr>
<td>12</td>
<td>GC 12 (M)</td>
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<td>Mysore Road</td>
<td>560</td>
<td>4800</td>
</tr>
<tr>
<td>13</td>
<td>GC 13 (M)</td>
<td>1998</td>
<td>Nayandahalli</td>
<td>600</td>
<td>4200</td>
</tr>
<tr>
<td>14</td>
<td>GC 14 (M)</td>
<td>1990</td>
<td>Mysore Road</td>
<td>660</td>
<td>4000</td>
</tr>
<tr>
<td>15</td>
<td>GC 15 (M)</td>
<td>1992</td>
<td>Peenya</td>
<td>620</td>
<td>3800</td>
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<tr>
<td>16</td>
<td>GC 16 (M)</td>
<td>1990</td>
<td>Yeshwanthpur</td>
<td>680</td>
<td>4400</td>
</tr>
<tr>
<td>17</td>
<td>GC 17 (S)</td>
<td>1998</td>
<td>Hoskerehalli</td>
<td>500</td>
<td>980</td>
</tr>
<tr>
<td>18</td>
<td>GC 18 (S)</td>
<td>1999</td>
<td>J.P. Nagar</td>
<td>450</td>
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</tr>
<tr>
<td>19</td>
<td>GC 19 (S)</td>
<td>2002</td>
<td>Yeshwanthpur</td>
<td>400</td>
<td>500</td>
</tr>
<tr>
<td>20</td>
<td>GC 20 (S)</td>
<td>2000</td>
<td>Nayandahalli</td>
<td>470</td>
<td>650</td>
</tr>
</tbody>
</table>
### TABLE 14

**Work Force Details**

<table>
<thead>
<tr>
<th>Sl.No.</th>
<th>Garment Company</th>
<th>Present Workforce</th>
<th>Break-up of Workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Managers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>M  F</td>
</tr>
<tr>
<td>1</td>
<td>GC 01 (L)</td>
<td>1900</td>
<td>14 08</td>
</tr>
<tr>
<td>2</td>
<td>GC 02 (L)</td>
<td>1780</td>
<td>13 07</td>
</tr>
<tr>
<td>3</td>
<td>GC 03 (L)</td>
<td>1210</td>
<td>11 09</td>
</tr>
<tr>
<td>4</td>
<td>GC 04 (L)</td>
<td>2552</td>
<td>18 10</td>
</tr>
<tr>
<td>5</td>
<td>GC 05 (L)</td>
<td>2212</td>
<td>15 09</td>
</tr>
<tr>
<td>6</td>
<td>GC 06 (L)</td>
<td>2100</td>
<td>12 08</td>
</tr>
<tr>
<td>7</td>
<td>GC 07 (L)</td>
<td>1900</td>
<td>14 08</td>
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<tr>
<td>8</td>
<td>GC 08 (L)</td>
<td>1600</td>
<td>12 10</td>
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<td>GC 09 (L)</td>
<td>1550</td>
<td>14 08</td>
</tr>
<tr>
<td>10</td>
<td>GC 10 (L)</td>
<td>1400</td>
<td>12 08</td>
</tr>
<tr>
<td>11</td>
<td>GC 11 (M)</td>
<td>900</td>
<td>11 06</td>
</tr>
<tr>
<td>12</td>
<td>GC 12 (M)</td>
<td>560</td>
<td>14 08</td>
</tr>
<tr>
<td>13</td>
<td>GC 13 (M)</td>
<td>600</td>
<td>10 05</td>
</tr>
<tr>
<td>14</td>
<td>GC 14 (M)</td>
<td>660</td>
<td>08 04</td>
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<tr>
<td>15</td>
<td>GC 15 (M)</td>
<td>620</td>
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<td>17</td>
<td>GC 17 (S)</td>
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<td>08 06</td>
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<td>18</td>
<td>GC 18 (S)</td>
<td>450</td>
<td>06 04</td>
</tr>
<tr>
<td>19</td>
<td>GC 19 (S)</td>
<td>400</td>
<td>08 05</td>
</tr>
<tr>
<td>20</td>
<td>GC 20 (S)</td>
<td>470</td>
<td>07 05</td>
</tr>
</tbody>
</table>

### 5.7 COMPANY PROFILES

**GC 01 L**: This garment company was established in the year 1984 with 400 employees and 250 machines with an initial investment of Rs.120 crores.
located at Yeshwanthpur. It is a family run business. The Company having a steady growth has reached the present strength of 1900 employees, having 3 Units engaged in the manufacturing of men’s wear i.e., shirts, trousers, jackets, etc. Almost 80% of the products are exported mainly to US and the remaining 20% to the domestic market.

**GC 02 L:** This Company was established in 1990 with 300 employees and 200 machines with an initial investment of Rs.90 Crores located at J.P.Nagar. The Management has not shown much of an improvement even though it started the Unit as a skill development centre. The present strength is 1780 carrying out its activities in two separate Units and catering to the domestic market.

**GC 03 L:** This garment Company was established at Peenya in the year 1986 during the initial stage of Garment Manufacturing wave with an initial investment of Rs.88 Crores having 250 employees and 200 machines. The Management having professional and modern outlook has appointed qualified professionals to carry out the activities. This Company is engaged in manufacturing of high valued children’s wear, which is mainly catering to the European market. The Company has grown progressively and reached a total strength of 1210 employees with very less labour turnover because of its good HR practices.

**GC 04 L:** This garment Company was established in the year 1988 at Yeshwanthpur. It was set up with an investment of Rs.100 Crores having 350 employees with 250 machines. The Management has a far sighted approach and specialized in manufacturing Jeans from Denim which is mainly catering
to the US market as well as the domestic market. The Company has a total strength of 2552 employees and has grown progressively.

**GC 05 L:** This Garment Company, an offshoot of Raymond Woollens, was established in the year 1999 in Yeshwanthpur. The Company started with an initial investment of Rs.98 Crores having 350 employees and 200 machines. It is engaged in the manufacture of high valued trousers for women and has expanded progressively reaching an employee strength of 2212 catering exclusively to the European market.

**GC 06 L:** This garment Company was established in the year 1996 in Peenya Industrial Area with an initial investment of Rs.60 Crores having 400 employees and 250 machines. The Company has progressed well with innovative HR practices and has reached a total employee strength of 2100. The Company has a huge customer base in the Gulf.

**GC 07 L:** This garment Company was established in the year 1997 in Peenya with an initial investment of Rs.75 Crores employing 400 workers and 250 machines. The Company is presently having 1900 employees and specialized in the manufacture of men's wear. It caters to both export as well as domestic markets.

**GC 08 L:** This Company was established in the year 1998 in Peenya with an initial investment of Rs.60 Crores having 300 employees and 180 machines. It is engaged in the manufacturing of exclusive shirts for Wallmart, USA. It is having a total strength of 1600 employees.

**GC 09 L:** This Company was established in the year 1999 in Peenya Industrial Area with an initial investment of Rs.65 Crores having 350 employees and 200 machines. The Company is engaged in the
manufacturing of Jeans for boys and girls and having a select market segment in both export as well as domestic. Presently, the Company is having an employee strength of 1550.

**GC 10 L:** The Company was established in the year 1996 in Yeshwanthpur with an initial investment of Rs.60 Crores, with 250 employees and 175 machines. The Company has adopted innovative HR practices and is engaged in the manufacturing of exclusive children’s wear for the European market and having a present strength of 1400 employees.

**GC 11 M:** The Company was started in the year 1990 in Mysore Road with initial investment of Rs.50 Crores with 300 employees and 150 machines. Because of the aggressive and dynamic outlook of the Managing Director, the Company has adopted very novel HR practices and is engaged in the manufacturing of men’s formal wear mainly in the European market. Present strength of the Company is 900 employees.

**GC 12 M:** The Company was established in the year 1996 in Mysore Road Industrial Area with an initial investment of Rs.48 Crores with 300 employees and 200 machines. The products being mainly children's wear to cater to European countries is having a present strength of 560 employees.

**GC 13 M:** The Company was established in the year 1998 in Nayandahalli with initial investment of Rs.42 Crores and employee strength of 250 and 150 machines. The Company is engaged in the manufacturing of knit garments especially men’s underwears under the Jockey brand for Export as well as domestic market. Present strength of the Company is 600 employees.

**GC 14 M:** The Company was established in the year 1990 in Mysore Road initially starting with accessories manufacturing with an initial investment of Rs
40 Crores and employees strength of 250 and 100 machines. The products being men's wear catering to the brand called 'Peter England'. The present strength of employees is 660.

**GC 15 M:** The Company was established in the year 1992 in Peenya Industrial Area with an initial investment of Rs.38 Crores with 200 employees and 100 machines. Even though the Company is engaged in the manufacturing of men's trousers, the employee turnover is very high due to lack of HR practices and the present strength is 620 employees.

**GC 16 M:** The Company was established in the year 1990 in Yeshwanthpur with an initial investment of Rs.44 Crores with 250 employees and 150 machines. Even though the Company is engaged in the manufacturing of Exclusive Men's wear, it has not been able to retain skilled work-force due to lack of good HR practices and the present strength of the Company is 680 employees.

**GC 17 S:** The Company was established in the year 1998 in Hosakerehalli with an initial investment of Rs.9.8 Crores with 200 employees and 125 machines. Being engaged in the manufacturing of children's wear, is having focus on the domestic market segment. Owing to the increased number of industrial relations issues, the Company is having excessive employee turnover and is having a present strength of 500 employees.

**GC 18 S:** The Company was established in the year 2002 with an initial investment of Rs.7.8 Crores in J.P. Nagar Industrial Area with 250 employees and 150 machines. It is engaged in manufacturing of Jeans for Boys and Girls catering to the domestic market and is facing a peculiar problem of turnover at Officers and Executives level due to poor management policies and is having
strength of 450 employees.

**GC 19 S:** The Company was established in the year 2002 in Yeshwanthpur with an initial investment of Rs.5 Crores with 250 employees and 150 machines. It is engaged in the manufacturing of mainly children’s wear and ladies wear for the domestic market and having tremendous potential for export market and is having 400 contented employees.

**GC 20 S:** The Company was established in the year 2000 in Nayandahalli Industrial Area with an initial investment of Rs.6.5 Crores with 200 employees and 100 machines. The Company is engaged in the manufacturing of Men’s wear and is aggressively trying to capture the export market with 470 employees with excellent HR practices.

The various processes in the garment houses are as follows:

- Fabric inspection
- Fabric cutting
- Pattern making
- Tailoring
- Ornamentation
- Washing
- Finishing
- Garment inspection
- Packing
- Shipment
Inspection

Ironing
Inspection

Ornamenting
Cutting