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Abstract

A critical challenge facing developing country producers is to meet international labour standards and codes of conduct in order to engage in global production networks. Evidence of gains for workers from compliance with such standards and codes remains limited and patchy. This paper focuses on the global football industry, a sector dominated by leading global brands who manage dispersed global production networks. It assesses the work conditions for football stitchers engaged in different forms of work organisation, factories, stitching centres, and home-based settings, in Pakistan, India, and China. It draws on detailed qualitative primary field research with football stitching workers and producers in these three countries. The paper explains how, and why, work conditions of football stitchers differ across these locations through an analytical framework that interweaves both global and local production contexts that influence work condition. In doing so, it argues that current debates on the role of labour in global production networks have to go beyond a narrow focus on labour standards and CSR compliance and engage with economic, technological and social upgrading as factors that could generate sustained improvements in real wages and workers conditions.

1. Introduction

Football is acknowledged to be the most popular sport on the planet. International trade in inflatable balls has grown systematically over the past decade and is close to US\$ 1 billion (Nadvi et al forthcoming).¹ A small number of leading global brands dominate the organisation of football manufacturing by sourcing through independent suppliers. These include Adidas, Asics, Mitre, Mizuno, Nike, Puma, Reebok, and Umbro (Lund-Thomsen and Nadvi 2010). In recent years, there has been greater consolidation amongst the brands, with Adidas acquiring Reebok in 2005 and Nike taking over Umbro in 2007. By 2009, Adidas – in its own estimate - accounted for 34% of the global football business and reported sales of US\$ 1.57 billion from football related merchandizing whereas Nike generated US\$ 1.7 billion from sales of footballs and football related products (Nadvi et. al., forthcoming). Brands source footballs from four distinct Asian production locations, China, Pakistan, Thailand and India. China dominates the manufacture of low to medium quality machine-stitched balls, while Pakistan is the leading producer for high quality hand-stitched ‘match’ balls². Thailand’s niche was premium thermo-moulded balls, but this is now also produced in China. India’s production is primarily of low to medium quality hand-stitched footballs.

There have been two key developments in football manufacturing in recent years. First, given the global cultural prominence of the sport, and the high profile of the leading brands, a range of labour standard concerns have affected global production networks in football manufacturing. Pakistan and India have faced challenges on child labour. This led to the implementation of a multi-stakeholder initiative to monitor labour and to address the causes of child labour (Lund-Thomsen and Nadvi 2010). In China, pressures on overtime, working conditions and concerns with the use of prison labour led to stricter enforcement of codes of conduct by the brands in their Chinese supply chains (Nadvi et. al., forthcoming, Xue et. al., forthcoming). Second, there has been systematic technological upgrading in product and process activities, with more advanced footballs and more mechanised forms of production. However, technological upgrading has been geographically uneven with China taking the lead and India as well as Pakistan attempting to catch up (Nadvi forthcoming).

¹ Inflatable balls include volleyballs, rugby balls, basketballs as well as footballs. Footballs, or what in the US is called soccer balls, are considered the largest single category and are the focus of this study.

² ‘Match’ balls are footballs used in actual professional tournaments and the leading international football clubs.

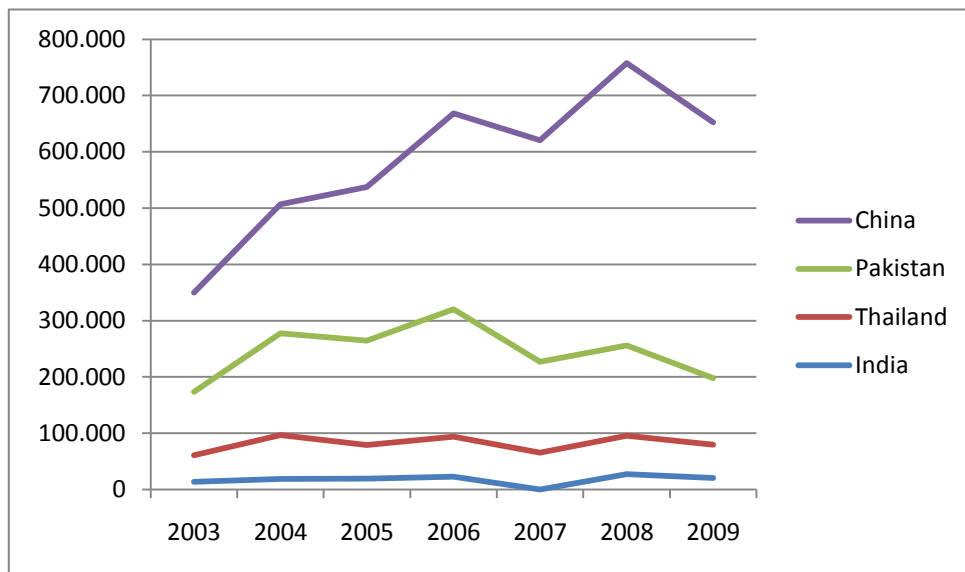
This paper seeks to contribute to the literature on labour in GPNs through empirical evidence. We assess the similarities and the differences in the work conditions of football stitchers engaged in factory, stitching centre, and home-based work in Pakistan, India, and China and try to explain why we observe these similarities and differences. We draw on detailed comparative research undertaken in China, India and Pakistan from 2007 to 2010, including interviews with suppliers, contractors, and workers as well as with the leading global brands. Finally, we argue that it is important to *not only* explore how the sourcing and CSR policies of internationally branded companies affect work conditions at supplier factories in developing countries, *but also* to recognize that a broader set of local and global causal factors are likely to influence workers' conditions in export-oriented industries. We suggest this might be achieved by drawing on insights gained from a range of interrelated literatures including work on global value chains, on industrial upgrading in these chains, and on local production organization.

The paper is structured as follows. The following section briefly describes the core features and trends in the global football manufacturing industry. Section 3 details our methodology. Section 4 presents an analytical framework to explain how similarities and differences in work conditions in the labour-intensive, export-oriented football manufacturing industry can be understood. Section 5 charts the main findings on work conditions and outcomes for factory-based, centre-based, and home-based football stitchers in Pakistan, India, and China. Section 6 provides an analytical explanation behind the differences in wages and work conditions across the three locations and its relationship to industrial upgrading/downgrading, GPN governance, and production organization in national institutional contexts. Finally, the conclusion considers the implications of this study for further policy and research on labour in global production networks.

2 The Global Football Manufacturing Industry: A brief overview.

As Figure 1 shows China's dominance in global exports of inflatable balls has been growing since 2003, whereas Pakistan and Thailand have been largely stagnant during the same period.

Figure 1: Exports of Inflatable Balls from China, Pakistan, Thailand and India, 2003 – 2009 (US\$000)



Source: UN Comtrade 2010

The **Pakistani** football industry consists of around 390 producers located in and around the city of Sialkot in Punjab. This used to be world’s leading centre for football manufacturing until the late 1990s. Sialkot’s producers traditionally prided themselves in their knowledge of high quality hand-stitching with the Sialkot cluster producing the entire range of high-quality match balls, medium quality training balls, and lower quality promotional balls. The **Chinese** football manufacturing sector consists of approximately 200 suppliers (Global Sources 2006). Chinese factories predominantly use machine-stitching technology. Football manufacturing is concentrated in Guangdong and Jiangsu provinces. Some of the largest manufacturers are also located in Fujian and Jiangxi provinces and in Shanghai. Investments from Hong Kong and Taiwan played a key role in the development of the Chinese football industry. The **Indian** football manufacturing industry is mainly located in the city of Jalandhar. The Jalandhar cluster is relatively small with only 150 exporting enterprises and a daily output of 45,000 inflatable balls. By contrast, the largest machine-stitching factory in China can produce 70,000 footballs a day. Jalandhar specializes in the hand-stitching of footballs although a few manufacturers have now also started machine-stitching. In **Thailand**, football production is dominated by a small handful of large producers engaged in machine-stitching of footballs. The profile of Thailand’s football manufacturing industry was raised in 2004 as the Japanese-owned firm, Molten, produced the first mechanized thermo-moulded ball

for Adidas. This was used for the European Cup tournament. However, in 2010 Adidas shifted its sourcing of thermo-moulded balls from Thailand to a supplier in Guangdong.

A common feature of the football manufacturing industry in Pakistan, India, and to a lesser extent China is the extensive use of subcontracting. In Pakistan and India, the process of stitching the balls is outsourced from the factory to keep overhead costs down, circumvent local labour laws, and retain flexibility in relation to seasonal changes in football demand. Outsourcing is done through subcontractors of whom there are approximately 2,450 in Sialkot and 1000 in Jalandhar. They serve as a link between suppliers and stitchers in both Sialkot and Jalandhar. Only one or two firms in both clusters directly employ their own stitchers. In both clusters, stitchers are generally either employed by the sub-contractors, or self-employed, and are paid on a piece-rated basis, with rates varying according to the type and quality of ball being stitched. In Sialkot, stitching takes place in 2,600 registered stitching centres and in Jalandhar approximately 3,000 registered centres have been identified. Stitching centres are designated sites – e.g., a rented building or an open courtyard - where the stitching of footballs takes place. Centres are usually managed by sub-contractors, and each centre is linked to, and undertakes work for, a specific manufacturer. Registration implies that these centres are monitored by the child labour monitoring programmes that operate in each cluster (Lund-Thomsen and Nadvi 2009).

Stitching centres vary in size. Sialkot's large centres accommodate between 100-500 stitchers, medium-sized centres have 50-100 stitchers, smaller centres have 10-50 stitchers, and home-based stitching centres have less than 10 stitchers. In addition, there are some non-registered home-based stitching locations, although it is difficult to estimate their number. Home-based stitching is often a full-time occupation in Sialkot and Jalandhar although some female stitchers in Sialkot mainly stitch on a part-time basis to supplement their family's income. In Jalandhar, approximately 30 stitching centres are small to medium-sized whereas the remainder are home-based units. There are numerous unregistered stitching locations in Jalandhar (Lund-Thomsen and Nadvi 2010).

In China, the process of subcontracting takes place from larger machine-based first-tier suppliers in Guangdong to smaller second-tier suppliers in Guangdong or other provinces such as Jiangsu where stitching sometimes takes place in townships or rural areas. Subcontracting has been extensively used in relation to the hand-stitching of footballs by some of the larger manufacturers based in

Shanghai to Jiangsu province where stitching was carried out in designated centres, informal workshops or the homes of village-based stitchers. In China, home-based stitching is mostly a part-time activity that helps rural women generate some additional income. Some suppliers, especially smaller producers and subcontractors based in Jiangsu, outsource both hand- and machine-stitching to local prisons (see Xue et. al., forthcoming).

3. Methodology

We undertook a full mapping of the supply chains and work forms found in the football manufacturing industries in Pakistan, India, and China as an entry point to investigating work conditions amongst factory, stitching centre, and home-based stitchers in this industry. This was done through interviews with key informants and academics, as well as with international buyers, local suppliers, contractors/subcontractors, and football stitchers in each country. In Pakistan we found home-based, centre-based, and factory-based stitching. In India, the dominant work forms were centre and home-based stitching.³ In contrast, factory-based stitching was the only work form observed in the leading football manufacturing region in Guangdong province in South China. In Jiangsu province in East China, the second largest manufacturing region in the country, factory-based and home-based stitching were the dominant work forms.

Our initial hypothesis was that work conditions in the football manufacturing industries of Pakistan, India, and China vary according to the type of work form and supply chain that football stitchers are inserted into. We expected that conditions would be better in the more regulated, formal factory work environments where stitchers would be covered by local labour law protection and worsen as we moved to the semi-formal stitching centres and the informal settings of home-based stitching locations operating outside the remit of labour laws. Similarly, we expected that stitchers were likely to experience the best work conditions if they were engaged in supply chains of CSR-sensitive mega-brands, such as Nike and Adidas. At the same time, we felt that football stitchers may experience the worst conditions when inserted into chains that supplied non-CSR sensitive buyers.

³ It should be noted that factory-based machine-stitching was introduced in two factories in Jalandhar in 2008/9. However, the total number of these workers – around 50 – could not be considered a dominant work form when compared to the total number of stitchers in the Jalandhar football cluster.

Based on these considerations we interviewed workers across the range of dominant work forms in each location. Although our sample sizes of firms and workers are small, and cannot claim to be representative, they were purposively selected to give an indicative picture of dominant work practices in each location. We also interviewed the leading global and regional brands, including Nike, Adidas, the UK-brand Pentland-Mitre, the Danish brand Select Sports and smaller specialized brands such as Fairdeal Trading. Interviews with the brands were carried out in Europe, the United States and with brand's representatives and sourcing offices in Pakistan and China.

In all three countries we interviewed a limited number of suppliers that fed into the different chains. In Pakistan we interviewed four large enterprises, three medium-sized enterprises, and four small enterprises. Similarly, we undertook five medium-sized enterprises, and four small enterprises in India. In Guangdong province we undertook six firm interviews, 2 with large factories, 2 with small factories, and 2 trading houses. In Jiangsu province we carried out 11 interviews with small and medium-sized manufacturers. Going further down the supply chain we interviewed six subcontractors in Pakistan and seven in India. Our interviews with brands, local suppliers and subcontractors were qualitative in nature and we focused on seeking to understand intra-chain relationships, the ways in which concerns on labour standards and CSR factored into these ties, and their implications for the distinct category of actors within the chain.

Finally, we conducted a total of 127 individual open-ended questionnaire interviews with football stitchers in Pakistan, India, and China. As shown below (Table 1) these were distributed according to the different work forms prevalent in each location. No interviews were carried out in work premises as this could compromise workers and impact on the quality of information we obtained. Hence, in Pakistan and India all worker interviews were undertaken in workers' homes, and we used a range of local key informants and snowballing techniques to identify stitchers engaged in different types of work forms. In China, we conducted interviews with workers outside the factories in Guangdong, usually meeting workers either during their lunch breaks or in the evening when they were not under observation by supervisors and managers. In Jiangsu, we could only conduct a very limited number of interviews with home-based stitchers due to difficulties in accessing these stitchers. In each location we endeavoured to follow proper ethical protocols, in particular ensuring confidentiality.

Table 1: Stitching Workers Interviewed by Work Form in Pakistan, India, and China

Work Form	Pakistan	India	China	Total
Factory Based Work	14	0	41	55
Centre-Based Work	19	14	0	33
Home-Based Work	17	15	7	39
Total	50	29	48	127

Our worker level interviews sought to explore worker backgrounds, working conditions, income levels, skill acquisition, understanding of CSR and labour standard concerns as well as labour activism and broader worker perceptions of their experience of work. We triangulated the information obtained through these interviews with reviews of international and national newspaper articles in Pakistan, India, and China; previous writings on the football industry (e.g., R. Khan 2007, A. Khan 2007); and through policy documents and reports produced by international aid agencies, local industry organizations, and market research companies. We also reviewed the websites – in particular the ethical guidelines– of internationally branded companies and studied national labour laws in each country. We carried out participatory observation during several factory tours, visits to stitching centres, and rural/urban areas where home-based stitching took place. During these visits we took extensive fieldwork notes and produced village and factory profiles of the localities where stitchers lived and worked. In addition, we carried out a wide range of interviews with other stakeholders that had an involvement in the football manufacturing industry. These included interviews with representatives of international aid agencies in Europe and Asia – in particular the United Nations Industrial Development Organisation (UNIDO) and the International Labour Organisation (ILO), as well as repeated discussions with local industry associations in Sialkot and Jalandhar, national government officials, NGOs and trade unions working to support stitchers, as well as ethical and fair trade consultants working in the industry.

4. Global Value Chains, Industrial Upgrading and Local Production Contexts: Implications for labour in football manufacturing

How do we explain the similarities and differences in work conditions of football stitchers in Pakistan, India, and China that participate in different work forms and value chains? Two distinct, yet inter-related, bodies of literature have addressed the role of labour in global production. First, scholars working on the inter-related concepts of global value chains (GVC) and global production networks (GPN) have argued that global lead firms play a critical role in the organization of GVCs (Gereffi et al 2005; Kaplinsky 2005), and that inter-firm relationships within GPNs are both socially embedded as well as influenced by a range of multi-scalar factors – from government regulations, international trade agreements to local norms and practices (Henderson et al 2002; Coe et al 2008). Central to the organization of GVCs and GPNs has been international standards, relating to health and safety, quality assurance, environmental impacts and working conditions (Nadvi 2008; Ponte and Gibbon 2005). Meeting such standards, it is argued, can be necessary for developing country producers to engage in such global networks (Nadvi and Waltring 2004). Second, the literature on corporate social responsibility (CSR) has sought to understand how firms integrate social and environmental concerns into core business practices in ways that raise value as well as address the interests of distinct stakeholders (Blowfeld and Frynas 2005). In this area there has been concern with how ‘voluntary’ CSR codes are implemented by suppliers, the extent to which this permeates down the supply chain, and the implications that this has for brands and workers.

The GPN/GVC and CSR literatures are beginning to converge as it becomes apparent that the structural dynamics of global competition and global sourcing, which result in higher returns for companies and shareholders and demand lower costs and shorter lead times for workers and suppliers, can accentuate non-compliance with labour standards and codes of conduct. Squaring these two, apparently disarticulated, challenges can be a major struggle for developing country suppliers, and have led to calls for more ‘just’ supply chains (Locke et. al., 2009). However, a critical gap in both bodies of literature is their limited understanding of the role of labor, in particular the potential gains to, and consequences for, workers arising from their participation in global value chains. In part, this reflects the focus within the GVC/GPN and CSR literatures with firms (or global corporations) viewed as the primary unit of analysis.

Recently a number of scholars have begun to recognise this disjuncture. Coe and Jordhus-Lier (2010) have linked the rich literature on labour geography to GPN analysis, and argued for a more

critical understanding of labour agency. Barrientos et. al., (2010) and Milberg and Winkler (2010) have explored the inter-relationship between economic and social upgrading within GPNs, and the consequences for worker livelihoods and working conditions from engagement with GPNs. Empirically, there have been attempts to assess the impact of codes of conduct on workers (Locke et al 2007, Barrientos and Smith 2007, Chan and Siu 2010, Sum and Pun 2005).⁴ Some studies concluding that codes act as ‘window dressing’ by failing to address core labour rights (Pun 2005, Xue, 2011). Given this experience, some practitioners and academics have advocated a ‘cooperation paradigm’ to improve workers’ conditions in supplier factories (Locke et. al., 2009, Oxfam 2010).⁵

In seeking to understand outcomes for workers from participation in global production networks we argue that a combination of possible vertical (global value chain) and horizontal (national and local institutional context) factors, and their dynamic interaction, is required. The challenge is not to use either vertical analysis or horizontal analysis to understand the conditions of workers in developing countries that produce for global markets. Instead, the challenge is to understand how global and local factors mutually condition, reinforce or contradict one another in different and shifting constellations, thus creating similar and differential outcomes for workers at particular moments in time (Neilson and Pritchard 2009, 2010). A critical factor, at the level of both vertical (global) and horizontal (local) ties or contexts, is upgrading and its consequences for workers. On this basis, we then develop an analytical framework for understanding the interplay between vertical and horizontal forms of analysis with reference to the international football manufacturing industry.

⁴Evidence of actual outcomes for workers from such initiatives suggests, however, that gains are at best patchy (Barrientos and Smith 2007, Locke et al 2007, Chan and Siu 2010, Sum and Pun 2005, Pun 2005).Improvements can be identified on tangible issues such as occupational health and safety (OHS) and limits on excessive overtime, but implementation of codes of conduct have had little direct impact on issues of labour rights such as freedom of association and collective bargaining (Chan and Ross 2003, ETI 2006, Barrientos and Smith 2007). It is also apparent that codes of conduct do not cover more vulnerable segments of the workforce in developing countries such as home-based, temporary workers, or casual workers, many of whom are women (Nelson et al. 2007). Studies have further highlighted the lack of coordination between the purchasing and CSR departments of international brands, and the distinct and competing pressures that they place on global suppliers (Barrientos and Smith 2007).

⁵The main features of this are the need for: (i) better co-ordination between the purchasing and compliance departments of international brands; (ii) greater co-operation between brands and suppliers to help suppliers upgrade their products and production processes; (iii) greater interaction between brands and local NGOs and trade unions in training workers in their legal rights and the brands’ codes of conduct; (iv) adopting a system of ‘mature industrial relations’ to improve work conditions and secure enabling rights such as freedom of association and the right to collective bargaining; and (v) continued and better engagement by private sector companies, NGOs, trade unions, and/or government representatives within multi-stakeholder initiatives that facilitate cross-sector learning and foster innovative solutions to complex challenges such as child labour or home-based work (Locke et. al., 2009, IDH 2009, Miller et. al., 2010).

This is inspired by particular bodies of theoretical literature – on industrial upgrading, on GVCs, on GPNs, as well local forms of production organization in developing countries.

Industrial Upgrading vs. Downgrading

We might be able to explain similarities and differences in work conditions at the bottom of global value chains with reference to the literature on industrial upgrading. As more and more low-cost producers enter the global economy, local suppliers in developing countries face a dilemma in terms of how they can survive in the face of increasing competition from other low-cost regions. Hence, developing country suppliers face a choice between engaging in the so-called high road or low road to competitiveness. The aim of the high road to competitiveness is to increase financial returns to local enterprises by engaging in product, process, functional or intersectoral upgrading strategies. That is, producing better products more efficiently, moving into higher value added activities e.g., design and branding of products, or by employing skills gained in one industry to become competitive in a related industry (Humphrey and Schmitz 2002, Schmitz 2004). Suppliers may also adopt a low road to competitiveness that is based upon a downgrading strategy. Downgrading involves moving into lower value-added activities, squeezing labour by providing lower wages, and failing to abide by social and environmental laws that regulate production in export-oriented industries (Kaplinsky 2005, Gibbon and Ponte 2005). In other words, we might be able to explain similarities and differences in work conditions within the same export oriented industry across different producer countries by looking at whether local suppliers follow the high or the low road to competitiveness.

Global Value Chain Governance

In global value chains, lead firms have the potential to exercise considerable influence over their supplier through their governance of the chain; i.e. by deciding what is to be produced, where, under what conditions, and for what price (Gereffi et al. 2005). In the case of football manufacturing, international buyers may play a key role in demanding continuous price declines from their suppliers or by compelling their suppliers in different regions to compete on the basis of price by informing them of what prices their competitors can offer. Naturally, this severely constrains the financial returns that local suppliers and stitchers can generate from participating in the global football manufacturing value chain. International buyers also play a key role in determining what kinds of footballs are to be produced. By favouring particular types of football,

e.g., thermo-moulded or machine-stitched balls over hand-stitched balls, they can influence the amount of work available to local suppliers and stitchers in Pakistan, India, and China. Global brands play a key role in coordinating and organizing the GVC for football production by influencing how footballs are to be produced. For example, international buyers often determine how balls are produced by specifying particular technical, social and environmental requirements that local suppliers must abide by. This can have either positive or negative implications for workers. On the one hand, the CSR aspirations of global buyers may favour the hiring of full-time, formally registered workers, working in factory-based settings and covered by national labour and environmental legislation. On the other hand, the enforcement of codes of conduct could exclude smaller-scale manufacturers and stitchers employed in the informal economy, e.g., home-based stitchers, from participating in the higher-value added parts of the global football manufacturing chain. Buyers can also influence when footballs are to be produced. International demand for footballs peaks each year between October and March in preparation for summer season in developed countries while also following a two-year cycle that coincides with the run up to either the European or World Cup Tournaments. International buyers of footballs mediate this demand by placing their production orders in preparation for these events. The implications for workers of these changing production cycles could either be excessive work – in the form of overtime – or too little work – in terms of job and income insecurity.

Local Forms of Production Organization

Similarly, various forms of local production organization in particular regions may play important roles in determining how footballs are to be stitched. At one extreme, some localities may seek to use mass production techniques involving very large firms whose workers have to perform strictly demarcated, often repetitive tasks in producing large volumes of standardized goods. Mass production involves the mechanization of production to achieve economies of scale and forms of work organization that serve to increase productivity, thus lowering unit labour costs (Kiely 1998). At the other extreme, some localities may seek to be competitive by being located in small firm industrial clusters that are co-located within a defined geographical space. In such clusters, information flows quickly between firms in the cluster, each firm tends to specialize in a given part of the production process and the use of subcontracting or so-called job working is extensive to meet changing demands of international buyers. In this model of local economic organization, an available pool of skill workers is found in cluster settings and local support institutions develop

forward and backward linkages, small firms tend to specialize in small batch production, and split up individual parts of the value chain into a large number of production units that are closely co-located within the boundaries of the cluster (Kiely 1998).

Mass production within factories potentially creates the opportunity for workers to engage in collective action through representative trade bodies. Where effective, such forms of labour agency and mobilisation can lead to higher wages and better job security. However, being involved in mass production may also result in increased management control and supervision of workers. As a result, workers may adopt a hostile stance towards their employers and use demarcation strategies, only performing what is stated in their employment contract while refusing to share their knowledge of what works and what does not work at the production line with their employers (Bradley et al. 2000). In industrial cluster settings, the use of subcontracting and flexible production might also have the advantages of fulfilling the needs of those workers who do not feel that full-time employment serves their particular needs. For some it may provide better possibilities for combining work and family life.

However, the use of subcontracting in clusters may also have a downside for workers. The kind of reorganization of value chains is often seen as weakening the demands of labour for better work conditions. First, outsourcing is often accompanied by deregulation and decentralized bargaining, as suppliers are unlikely to be covered by collective industry agreements. Second, as witnessed through outsourcing of production to locations in the developing world, the core workforce in the developed world is often under pressure to make concessions on their employment conditions in order to be able to keep their jobs. Third, outsourcing leaves peripheral workers to cope with the disadvantages and risks of cost-cutting and flexibility (Flecket 2009, p. 253), resulting in income and employment insecurity.

5. Similarities and Differences in Work Condition

Earlier we outlined an analytical framework to help explain similarities and differences in the work conditions of football stitchers. This focused on the role of industrial upgrading/downgrading, global value chain governance, and production organization in national institutional contexts. Here we present the main findings gleaned from our worker level interviews of work conditions of factory, centre-based, and home-based football stitchers in Pakistan, India, and China. An overview

of the similarities and differences in work conditions are listed in Table 2 below. This evidence needs to be treated with some caution given that our sample size in each location and distinct work form was small. Thus, we make no claim that this data is representative. Nevertheless, the data provides indicative insights into differences across the three country locations and work forms.

Table 2: An Overview of Work Conditions for Stitchers in Pakistan, India, and China by Work Form.

	Sialkot			Jalandhar		Guangdong
Workform	Factory	Centre	Home	Centre	Home	Factory
Median Monthly Wage (in PPP \$) ⁶⁷	262	190	78	182	177	439
Median Hourly Wage (in nominal US\$)	0.38	0.32	0.28	0.24	0.15	0.89
Weekly Work Days	6.0	6.0	6.2	6.0	6.4	6.0
Daily Work Hours ⁸	9.1	7.8	7.5	7.2	8.1	10.3
Child Labour	Absent	Absent	Unknown	Limited	Limited	Absent
Unionization & Collective Bargaining	No	No	No	No	No	No
Social Insurance	Wide Coverage	No	No	No	No	Limited Coverage

Source: Authors' survey

⁶ Wages were calculated in the following ways. In China, the monthly wages were entered as per the responses of the stitchers interviewed. In Pakistan and in India, wages were calculated by multiplying the average rate received per football by the stitcher interviewed and then multiplying this by the average number of balls stitched by the stitcher per day. Finally, this number was multiplied by the number of working days for each stitcher month. This method was adopted for India and Pakistan given the low literacy rates amongst football stitchers who were often not in a position to calculate their exact monthly wages. This was then converted into purchasing power party \$ using the World Bank's PPP conversion rates.

⁷ In national currencies, the median monthly incomes were as follows in nominal terms: Pakistan – Factory (PKR 7540), centre (PKR 5460), and home (PKR 2275). In India, centre (INR 3000) and home (INR 2925). In China (Guangdong): Factory (RMB 1625).

⁸ For factory-based football stitchers work hours were entered on the basis of actual hours spent inside the factory/the stitching center for work purposes. For home-based stitchers, we asked about their daily routines, when they began, took breaks, resumed football stitching, and finished at the end of the day. This was necessary as stitchers themselves did not always have a clear idea of how many hours they actually spent on football stitching.

What is apparent from our data is that, as expected, factory-based football stitchers earn the highest monthly incomes. This is across the three country locations as well as within Pakistan (the only location where all three forms of work organisation were observed). We present wage data first in terms of purchasing power parity dollars. This provides a more effective basis to capture the comparative real wage levels across the three locations. At the top are Chinese factory-based football stitchers in Guangdong who earned the equivalent of PPP\$ 439 a month.⁹ This was 40% more than their Pakistani factory-based counterparts who earned PPP\$ 262 home per month. In terms of centre and home-based stitchers, we find that Pakistani centre-based football stitchers, Indian centre, and home-based football stitchers in our sample earn almost identical monthly incomes at PPP\$ 190, 182 and 177.

When we review the nominal wages (that is to say not converted in PPP terms) we see that the wages differences between China and the South Asian locations are even more sharply defined. As shown in Table 2, the hourly nominal wages in Chinese factories (US\$ 0.89) are more than double the hourly wage in Pakistani factories (US\$ 0.38) and more than three times as high as nominal wages in Indian stitching centres (US\$ 0.24). While the PPP wage levels provide an indication of real wages, the nominal hourly wages provide a better sense of how comparative wage rates may affect the sourcing decisions of global buyers.

Football stitching can be seasonal in line with international demand for footballs, and some stitchers especially in India and Pakistan reported that they often did not obtain stitching work for months at a time. However, when there were enough order stitchers in Pakistan, India, and China generally worked six days a week.¹⁰ Although, in terms of daily work hours, there was a large difference between Chinese and South Asian football stitchers. Chinese factory-based football stitchers in our sample worked longer hours on average (10.3 hours a day) than their South Asian counterparts.

Overtime payments did not apply to Pakistani and Indian home and centre-based stitchers given that they did not have any contract defining their work relationship and working hours with the suppliers whose balls they stitched. In the case of China however, factory-based stitchers generally

⁹ In contrast, anecdotal evidence suggest that home-based football stitchers in Jiangsu province earn about PPP\$ 65 – 92 a month.

¹⁰ The average for India is somewhat higher, but not significant given the small number of home-based stitchers in our Indian sample where a few outliers responded that they also worked on Sundays.

indicated that they do work overtime while home-based stitchers in Jiangsu did not receive any overtime payment.¹¹

On occupational health and safety (OHS) our findings reveal that the vast majority of football stitchers in China using machine-stitching report that they do not suffer from OHS problems related to football stitching. This is in contrast to Indian and Pakistani football stitchers using hand stitching, where OHS problems related to deformed fingertips, shoulder and elbow inflammations, arm pain and back pain were common. In India, 100% of the home-based and centre-based stitchers reported suffering from health related problems as a result of their stitching work. In Pakistan, some factory-based stitchers indicated that they suffered OHS problem while most centre-based stitchers (70.6%) and home-based stitchers (93.3%) stated that they had faced OHS problems.

Contrary to earlier research in Sialkot and Jalandhar (see e.g., Husselbee 2000, Goyal 2004, 2005), we found little evidence to suggest that football stitching was still undertaken with the help of child labour in either Pakistan (Sialkot), India (Jalandhar) or China (Guangdong).¹² Our own field-level observations in Sialkot and Jalandhar suggest that child labour has been substantially diminished if not virtually eliminated from export-oriented manufacturing of footballs.¹³ In Jiangsu province, we found anecdotal evidence to suggest that prison labour was involved in the stitching of footballs. While we were unable to ascertain how widespread this practice is, a subcontractor in Jiangsu province offered that he could get us 3000 balls stitched in a prison while a factory told us that they had set up a production facility for machine-stitching inside a prison. During an internet search we also came across a prison that – in Chinese – publicly advertised its ability to supply footballs (see Xue et al. forthcoming).

Our research shows that unionization is generally absent in football stitching in Pakistan, India, and Chinese. In Pakistan factory-based work an attempt has been made at setting up worker committees.

¹¹ The number of valid responses in our sample of Pakistani factory-based stitchers was too low to make any firm conclusions regarding overtime in that particular setting.

¹² The only exception to this is that in our field research in India we did come across one stitching family in Batala where a female stitcher was assisted by her children in some light tasks once they came back from school, while a stitcher working in a centre claimed that children were involved in stitching there but ran away when the child labour monitors come. In Pakistan, the Independent Monitoring Association for Child Labour reported to us that it usually finds 2 to 3 children a month during its visits to stitching centers in Sialkot out of a total work force of approximately 30,000 registered stitchers.

¹³ A recent NGO report (ILRF/BBVA, 2008) documented the extensive use of child labor in the football manufacturing cluster of Meerut in the Indian state of Uttar Pradesh. However, the football cluster in Meerut is not primarily engaged in export-oriented production whereas this article focuses on the main export-oriented cluster of India, Jalandhar.

However, these have been largely unsuccessful in terms of protecting workers' rights. In India, an official trade union does exist for football stitchers. However, it is largely ineffective, with a limited membership, and receives money from local entrepreneurs to curb its demands. In terms of industrial action, however, we found evidence of factory-based stitchers in Pakistan and China spontaneously organizing to defend their rights. In Pakistan, a strike was spontaneously undertaken with the aim of pressurizing factory management in the main Nike supplier in Sialkot. The strike happened during the financial crisis in mid-2009 where the factory was forced to temporarily lay off a large number of workers. It appeared as if factory management intentionally miscalculated the factory-based stitchers monthly wages. However, once stitchers became aware of this, they stopped work and only resumed once they had obtained a promise from the factory owner that due wages would be paid in full. Similarly, on 7 May 2009, two thousand workers in a large export-oriented factory in Guangdong because of the re-location of the factory relocation and the dismissal of workers without full compensation for wages due.¹⁴ On June 7, 2010, more than one thousand workers went on strike at the new factory site and destroyed part of its administrative office because the security guards of the factory had beaten workers.¹⁵

In terms of social insurance, we found that Pakistani and Chinese factory-based football stitchers mostly have some form of social insurance. In Pakistan, this included health, pension, and unemployment benefits whereas this only related to pension benefits in China. Regarding centre and home-based stitchers in Pakistan and India, these were generally not covered by any social insurance. Anecdotal evidence suggests that there a similar situation prevails amongst home-based stitchers in Jiangsu province. In Pakistan however, we found two exceptions where centre-based stitchers were provided with medical insurance. One was stitchers producing fair trade footballs whereas some stitchers worked for a local factory that paid for their stitchers' medical insurance and their children's basic education.

While social insurance has typically been associated with formal (factory-based) work settings, we also investigated whether centre and home-based stitchers had any kind of social safety nets provided by local NGOs. In Pakistan, we found that stitchers across all work forms reported that

¹⁴ Source - http://epaper.nddaily.com/I/html/2009-05/07/content_783623.htm; accessed 2 April 2010.

¹⁵ Source - http://blog.sina.com.cn/s/blog_4999f0bf0100it2k.html, accessed 2 April 2010.

NGOs were sometimes present in their localities. In India however, we did not find any evidence of NGOs working to assist football stitchers with the exception of two particular villages outside of Jalandhar.

6. Factors Affecting Differences in Work Conditions for Football Stitchers

In the previous section we outlined what appeared to be the most significant similarities and differences in the working conditions of Pakistani, Indian, and Chinese football stitchers. We now turn to the question of what explains these similarities and differences. Our analysis is structured on the basis of our analytical framework on industrial upgrading/downgrading, global value chain governance, and production organization in national institutional contexts. As suggested earlier, global and local factors may mutually condition, reinforce or contradict one another in ways that create distinct outcomes for workers. Here, we set out how some of these factors might effect work conditions.

a) Industrial Upgrading

Perhaps the most significant difference in the work conditions of Pakistani, Indian and Chinese football stitchers is that Chinese factory-based workers earn significantly higher wages than football stitchers in India and Pakistan. Part of the explanation for this difference appears to be the *process upgrading* undertaken by Chinese manufacturers. Chinese football manufacturing became prominent on the global stage with the invention of machine-stitching technology and the emergence of mechanised football manufacturing plants in China. This resulted in a dramatic increase in productivity in comparison with hand stitched football production in Pakistan and India. Our firm level qualitative data suggests that a Chinese factory-based machine stitcher can stitch on average 39.8 balls a day whereas the average Pakistani hand-stitcher could stitch 4.5 balls a day and the Indian hand-stitcher 3.9 balls. This implies that the daily productivity of Chinese factory-based stitcher was 8.6 times higher than their Pakistani counterparts and 10 times higher than their Indian counterparts. If we adjust for the number of hours worked per day, we find a similar story. The hourly productivity of machine-based Chinese stitchers in a large export-oriented factory working in teams was approximately 6.9 times higher than Pakistani hand-stitchers and 7.8 times higher than that of Indian hand-stitchers.

Sialkot's manufacturers have traditionally specialized in the niche-production of high quality hand-stitched balls. They have, however, lost a significant portion of the world market in training and

promotional balls in recent years to Chinese competitors. While Pakistani manufacturers continue to emphasize that hand-stitching produces higher quality football, Chinese manufacturers, however, have realized that it is price and branding rather than the quality of footballs alone that are the determining factors in the purchasing decisions of end consumers, especially in the mass market for training, recreational and promotional balls. As globally branded firms play a key role in the marketing of these footballs, consumers base their purchasing decisions primarily on the basis of the brand name – e.g., Nike or Adidas – and price rather than whether a ball is hand- or machine-stitched.

As Pakistani and Indian manufacturers have not introduced machine-stitching technology on an industry-wide basis, they are unable to match the productivity levels of Chinese football manufacturers and thus forced to squeeze wages of their football stitchers. As our research in both Sialkot and Jalandhar indicated, football stitchers experienced only minor nominal wage increases in the last five to ten years. Consequently, real wages taking into account inflationary pressures had declined.

Process upgrading – in the form of the invention of machine-stitching in China – may have also reduced the OHS risks that Chinese football stitchers face in comparison with their South Asian counterparts. In Pakistan and India, the vast majority of hand-stitchers that we interviewed complained of injuries to their hands and lower parts of their arms caused by pricking of the needle, as well as back pain arising from sitting for long hours crouched in the same position on the floor or on low stools. Similarly, the few Chinese stitchers who did mention any OHS problems tended to be the ones involved in the last step of the machine-stitching process where the football has to be closed using handstitching. In China, only 2 out of regular 25 machine-stitchers reported any OHS problems as a result of their involvement in football stitching. Chinese machine stitchers usually sit on chairs along production lines using sewing machines. In our view, the high rates of OHS problems reported in Pakistan and India, and their being less widespread in China, may be explained by the different types of stitching techniques used in football manufacturing: hand-stitching vs. machine-stitching and the sitting positions of workers.

b) Global Value Chain Governance

It also appears that CSR and sourcing strategies adopted in the interaction between international buyers and local suppliers may affect work conditions for football stitchers in each country. This can have both positive and negative effects, creating winners and losers amongst stitchers

participating in different work forms in the industry. The decline of child labour in football stitching in Sialkot and Jalandhar over the last 15 years can largely be related to a variety of CSR initiatives within the Pakistan and Indian football manufacturing industries. First, child labour monitoring has been introduced in both clusters since the end of the 1990s. While the effectiveness of these monitoring mechanisms have been the subject of both policy and academic discussion (see e.g., Lund-Thomsen and Nadvi 2010), their establishment has brought about a general impression that the involvement of children in football stitching is illegal. In Pakistan in particular, the involvement of children in centre-based football stitching will have direct livelihood implications for those centres as they are likely to be closed if child stitchers are found within them. Second, various NGO awareness raising campaigns in Sialkot and Jalandhar have changed the perception of child labour within local stitching communities. Most stitching parents felt that involving children in football stitching was not helpful to their child's future. On the one hand, it would compromise their schooling. On the other hand, involving them in football stitching from an early age would mean that they could be restricted to an occupation that was turning out to be increasingly unviable with falling real wages and declining levels of work over the last decade.

The factory-based model of football stitching facilitates compliance with the international CSR requirement of Western buyers. Generally, these brands prefer that production is in-sourced in factory-based settings where wages, work hours, overtime payments etc. can be more easily controlled than in the informal urban and rural settings of Sialkot and Jalandhar. Hence, the factory-based model of production facilitates the access of workers to benefits such as social insurance (health, pension, unemployment etc.) and overtime payments which are much more widespread under the factory-based model of football stitching in Guangdong than in the centre-based and home-based settings in Sialkot and Jalandhar. Similarly, we observed that the factory-based model of football stitching in Sialkot and Guangdong allowed workers to collectively organize spontaneous strikes in relation to the delayed or incorrect payment of monthly wages (in Pakistan) as well as factory closures-relocations (in China).

Yet the introduction of the factory-based model of football stitching in Pakistan has also had some negative, and unintended, consequences. Nike is the only international brand that insists that football stitching must take place inside the factory premises of its supplier in Sialkot. While this may help workers obtain the minimum wage, social security, and overtime payment prescribed under Pakistani law, it does not take into account the socio-economic reality faced by many of the

female stitchers living in the villages surrounding Sialkot who are unable to commute to and from Nike's supplier factory due to patriarchal norms imposed by their male family members. Consequently, there are no female stitchers employed by the Nike supplier.

Our findings from China illustrate similar kinds of trade-offs in relation to the implementation of CSR requirements of international brands and their effects on workers' conditions. In some factories supplying either the leading brands (Nike or Adidas) or non-sports brands (such as Disney) we found that the implementation of CSR requirements placed limits on the number of hours that stitchers could work a day. In these cases, the maximum number of daily work hours was 10, six days a week with Sunday off. However, as they were only allowed to work ten hours a day, football stitchers in these factories tended to earn slightly lower monthly wages than stitchers in another factory that did not appear to face similar CSR pressures from its buyers. In fact, this factory was a subcontractor to a medium-sized factory supplying footballs to an international non-sports brand. Here football stitchers worked an average of 12 hours a day, usually seven days a week. As all factories, not only in China but also in Pakistan and India, operate on the basis of the piece rate system, the monthly wages of stitchers working in this factory was somewhat higher than those of their counterparts working in the Guangdong factories where CSR requirements are more strictly enforced. However, the hourly wages of football stitchers in this factory tended to be lower than in the 'CSR compliant' factories that supply the mega, small- and medium-sized, and non-sports brands.

Producers in Sialkot, Jalandhar, and Guangdong province also face different sourcing pressures through the global supply chain. On the one hand, international demand for footballs fluctuates. It peaks in the run-up to the European Cup and the World Cup and then drops immediately after these tournaments end. International demand also changes in relation to the larger cycles of international capitalism, such as the global financial crisis that hit the international football industry in early 2009. As all three production locations produce footballs in the promotional segment, they also faced downwards pressures on price as international buyers can source these products from all three countries. Hence, price competition in this segment of the market is intense. In sum, local manufacturers have to be able to adjust their production levels to changing international demand, they tend to face constant downwards pressure on prices, they need to develop new footballs and football manufacturing methods, and they have to comply with international CSR standards if they want to sell into the high-end of the international football market.

c) Local Forms of Production Organization

In our view, local production organization within Sialkot, Jalandhar, and Guangdong play an important role in the ability of local manufacturers to cope with the pressures that emanate from the global value chains into which they are inserted. Producers in Sialkot and Jalandhar have built their international competitiveness on the basis of cluster-based agglomeration economies. In contrast, manufacturers in Guangdong province have built their export capability on a mass-production model. These different forms of industrial organization have implications for the work conditions of football stitchers in all three settings.

Small-firm industrial clusters may be able to compete in the international economy by specializing in small batch production for niche markets, and splitting up production processes between large numbers of smaller units that are located within a narrowly defined geographical area. In this form of industrial organization, subcontracting and the use of job-working are extensive in order to meet the changing demands of international buyers.

This form of industrial organization was well-suited for the kinds of demands that local manufacturers in Sialkot and Jalandhar faced from the early 1970s until the mid-1990s. In the early 1970s, as international demand for footballs began to surge in both Sialkot and Jalandhar, it soon became obvious for local entrepreneurs that it was no longer viable to keep the most labour-intensive part of production inside the factories. As labour laws were strengthened in the early 1970s, and industrial strikes became more frequent (in Sialkot), local entrepreneurs felt that it was too expensive to retain permanent employees at times when football demand was low. This led to the sub-contracting of stitching from local factories to the homes of the football stitchers. This added to the flexibility for producers to respond to changing demands as well as allow them to avoid social protection provisions within the labour laws. At the same time, placing a network of contractors in between the football factories and the stitchers themselves limited the risks of industrial disputes that could disrupt production and/or lead to increased demands for better work conditions in the industry. In our interviews with home- and centre-based football stitchers in Sialkot and Jalandhar we asked whether they ever engaged in any kind of bargaining over stitching rates. Often the answer was that while football stitchers did complain about the rates to their contractors, the contractor would reply that rates were fixed by the factory and could not be changed. The institutionalization of sub-contracting made it very difficult for trade unions to form

and collective bargaining to emerge. In terms of producing outcomes for workers, outsourcing can result in the risks associated with global capitalism being pushed down to the lowest point of the football stitching chain. The outsourcing of hand-stitching to centre and home-based locations tends to reduce the incomes of football stitchers, resulting in income and occupational insecurity.

We believe that part of the explanation for the longer hours put in by Chinese football stitchers relate to their being migrant workers whereas their counterparts in Sialkot and Jalandhar tend to be local residents. Most of the workers labouring in the Guangdong factories are migrant workers. They have often left their home provinces, and their families, to come to Guangdong in order to save as much as possible in the shortest possible time span. With wages paid on a piece-rated basis they can earn more by working longer hours. Hence, even with limits on working hours in place in some factories, with overtime Chinese stitchers work more hours per day than their counterparts in Sialkot and Jalandhar. There are no migrant workers in Sialkot and very few in Jalandhar from the Indian state of Bihar. Instead, Sialkot's and Jalandhar's football stitchers work and reside in the same locality with their families. Hence, it may be more difficult for them to work more than 7-8 hours a day if they have to spend time engaged in domestic and other forms of labour. This is especially so for rural based stitchers who may have farm and off-farm based activities to undertake alongside their football stitching work. In Sialkot and Jalandhar, both male and female centre and home-based stitchers explained that they would not want to work in factory-based settings as they preferred the flexibility that centre and/or home-based work allowed them. This allowed them to come and go anytime and to attend to domestic issues during regular work hours.

Conclusion

This paper sought to provide empirical insights into labour in global production networks using the case of the global football manufacturing industry. We undertook a comparative investigation of work conditions amongst football stitchers in Pakistan, India, and China and explain why these work conditions are similar or different across these countries. In doing so, we argued that the similarities and differences in work conditions of football stitchers can be explained with reference to the intertwined factors of industrial upgrading/downgrading, global value chain governance, and different types of local production organization.

It appears that Chinese football stitchers (in Guangdong) are better off than their South Asian counterparts in Sialkot and Jalandhar. Factory-based football stitchers in Guangdong earn significantly higher monthly wages than football stitchers in Sialkot and Jalandhar. They can save part of their earnings, which only some stitchers in Pakistan can do while virtually no football stitchers in Jalandhar are able to put any money aside from their stitching work. Chinese factory-based football stitchers are much less exposed to occupational health and safety risks than their counterparts in Pakistan and India. While freedom of association and collective bargaining are largely absent in all three production locations, Chinese factory-based stitchers in Guangdong appear better able to organize protests and strikes that pressure their employers than the vast majority of football stitchers in Sialkot and Jalandhar who work across a large geographical area, mostly without any direct relationship between themselves and the factory whose balls they stitch. In terms of compliance with international CSR demands, it also appears that Chinese factory-based football stitchers tend to have medical insurance, unemployment insurance, and overtime payment than their counterparts in Sialkot and Jalandhar. The only exception in South Asia is a supplier to Nike that has in-sourced the process of football stitcher in response to pressures from Nike. Hence, it is only in this factory that football stitchers enjoy similar levels of social protection as their counterparts in China. The only aspect where the work conditions of Chinese football stitchers in Guangdong may be considered worse than in Sialkot and Jalandhar is in relation to work hours. Football stitchers in Guangdong put in longer hours than their South Asian counterparts.

However, if we take a broader view of work conditions through the perspective of football stitchers themselves, we arrive at a more mixed assessment. First, during the period of our study it appeared as if factory closures in the Chinese football manufacturing industry were more frequent than in Jalandhar or Sialkot, leaving several thousand workers unemployed. Second, while our investigation took place during a financial downturn in 2009/early 2010, football stitchers in Guangdong generally have to put in longer hours and experience greater work intensity than their counterparts in Sialkot and Jalandhar which may result in long-term health effects that we have not been able to document as part of this study. Third, Chinese football stitchers working as migrant laborers in Guangdong province are generally denied having a family life throughout the year. While this may be reflected in higher financial earnings for themselves and their families in the short-term, it is difficult to assess what the long-term emotional and psychological implications of physical separation are for married stitchers, their spouses, and children.

This raises a final challenge posed by this study. While it may be that Chinese football stitchers in Guangdong province are better off in terms of their monthly earnings, any assessment of ‘better off’ or ‘worse off’ depends upon the yardstick being used. Working as a football stitcher – whether in Pakistan, India, and China – is contingent upon receiving relatively low wages. Improvements in work outcomes for labour within the industry require an increase not only in productivity but also in wage rates. Improving wages requires collective bargaining pressures by workers, and this remains relatively limited and especially so in India and Pakistan. Moreover, these concerns have been outside the purview labour standards and codes of conduct interventions in the football manufacturing sector.

This study suggests that codes of conduct focusing on specific aspects of labour standards do not in themselves generate improved livelihoods and working conditions for football stitchers. Moreover, while compliance pressures from the leading global brands may have some positive gains, these may well be outweighed by the competitive pressures and risks that brands force down on their suppliers, and their suppliers then push down to workers. Some categories of workers may become especially vulnerable. To bring about real improvements in working conditions the policy debate has to go beyond labour standards and CSR compliance and engage with the economic, technological and social upgrading that could potentially generate sustained improvements in real wages and working conditions for workers. ‘Decent work’ requires enabling rights as well as productivity gains, and it calls for greater understanding of the agency and perspectives of workers in global production networks.

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