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Exploring the Challenges and Prospects of the Padma Bridge for the Growth of the Apparel Industry: Evidence from South-Western Bangladesh

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ABSTRACT

Purpose: To remain competitive and address constraints, selecting the optimal location for establishing RMG factories is a critical managerial decision for garment owners and managers. Accordingly, this paper aims to examine the impact of the Padma Bridge on the RMG industry in southwestern Bangladesh by analyzing the advantages and challenges of this location.

Methodology: The study adopted a qualitative approach, conducting 19 semi-structured interviews with 9 garment managers and 10 garment workers.

Findings: A thematic analysis of the data identified major challenges, including inadequate utility facilities and an underdeveloped supply chain, as well as key opportunities, such as access to ports and a large, affordable workforce. Additionally, solutions to overcome these challenges were highlighted, including accelerating the execution of ongoing infrastructure projects (ports, utilities, and transportation development) and implementing new policies to encourage RMG manufacturers.

Practical Implications: The findings of this research could help new entrepreneurs and existing garment manufacturers navigate future challenges associated with Bangladesh's LDC graduation.

Originality/Value: While the RMG sector historically played a pivotal role in the national economy, the sectors contribution in the industrialization of southeast region remains largely unexplored. To address this gap, this research offers a systematic investigation into the economic opportunities of the RMG sector in southeast region following Padma Bridge. This research offers deeper insights into the emerging opportunities and challenges, providing a foundation for informed decision–making for policy makers, investors, and industry stakeholders.

Limitations: The findings of this study cannot be generalized to other research contexts, as they are based on a small sample of respondents. Future research could explore cross-sectional data for broader insights.

1. Introduction

Bangladesh is a riverine country with over 1400 rivers currently flowing across the country (*Bangladesh Water Development Board | Home*, n.d.). To make transportation easy and faster, the Government of Bangladesh constructed twenty major bridges (Md. Munirul Islam et al., 2020a). Among them "Padma

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Multipurpose Bridge" is one of the biggest projects Bangladesh has taken so far to improve transportation and communication which connects the less-developed southwestern region of Bangladesh with the eastern half including the capital Dhaka and the port city (Adhikary Tuhin Shubhra, 2022; New Age, 2022; The Financial Express, 2021). The bridge has reduced more than 100 km of distance from Dhaka to the southwest region and will save more than 3 hours (Md. Munirul Islam et al., 2020a). Recently after the inauguration of the Padma Multipurpose Bridge, the southwestern part of Bangladesh is considered the most potential location for industrialization because, among the diversified impact of the bridge on the economy of Bangladesh, the infrastructural development of the southwest region is a major one. As a result of the bridge, 21 districts of the southwest are directly connecting with Dhaka and shortly Trans-Asian highway and Trans-Asian Railway will pass through this region (Rabbani Golam, 2022). Through the Padma bridge, utility facilities are also going to the southwest region, the utility services are; i) 760 mm dia Gas Transmission line, ii) 150 mm dia fiber optical & telephone duct, iii) 7 nos high voltage electric line which will help both side people (Bangladesh Bridge Authority- BBA). Besides the transportation and utility facilities, under BEZA, the government has plans to set up 17 economic zones in the southwest (Mirdha Refayet Ullah, 2022) along with Joshor EPZ (The Business Standard, 2021) and Patuakhali EPZ (Hossain Sohrab, 2022). For transportation facilities, activities in the ports situated in the southwest (Payra and Mongla seaports, and Benapole and Bhomra land ports) have increased and the government has also taken projects to make those ports more efficient and effective. According to BGMEA, the RMG sector has a huge opportunity to grow in the southwest region (Apparel Resources, 2022). Many giant garments manufacturer already purchased land in the southwest to grab the opportunity (Talukder Farhad, The Business Post, 2022)

According to Statista (2021), ready-made garments constitute of 81.16 percent of the total export, making RMG the major export-earner sector of the country. Currently, around 5,000 RMG factories are actively running employing nearly 4.4 million people (Farhana et al., 2019). Bangladesh has been targeted by many foreign investors because of its internal factors like vast human resources and low wages (Nuruzzaman Md, 2013;Islam Md. Saiful et al., 2016). Besides the internal factors, other external factors also work behind the competitiveness of the garments industry in Bangladesh which are the GSP facility, DFQF facility, and integrated framework for technical assistance for the LDCs (Islam Md. Saiful et al., 2016). By 24 November 2026, Bangladesh will graduate from the LDC to the Developing Country status (United Nations, n.d.) and as a result, the RMG industry will lose all external support (GSP, DFQF, and other preferential treatment) from the external factors (WTO, UN, and EU). To maintain its position in the global market until any potential industry rises, the garment industry needs to seek ways to keep the production cost lower compared to other countries and increase production efficiency. The government should utilize the time until the complete loss the preferential treatment to overcome the constraints this industry faces and improve the internal facilities. The major constraints are i) the lack of a backward linkage supply chain, ii) infrastructural problems, iii) poor port facilities, iv) customs delay, and v) government support. After the inauguration of the Padma Bridge, the southwest region is becoming increasingly equipped with the key facilities- such as ungraded infrastructure, efficient port, and enhanced utility services to overcome the longstanding logistical constraints prevailing with the RMG sector. While the improved connectivity with the southwestern part of Bangladesh is expected to play significant role in promoting growth in RMG sector according to extant expert dialogues, other factors may also influence the trajectory of the growth. For example, availability of skilled manpower, policy support, global demand fluctuation due to increased tariff, and environmental compliances may also play critical role and posit challenges in materializing the opportunities. Against the stated backdrop, the key objective of this research is to examine the potential of the growth of the RMG industry in the southwest post- Padma Bridge. The specific objectives are:

I. To investigate the challenges of the RMG sector in the southwest part of Bangladesh.
II. To explore the opportunities of the RMG sector at the southwestern location.

2. Literature Review

2.1 Ready-Made Garment Sector of Bangladesh

According to (Islam Md. Saiful et al., 2016), post-independence in 1971, jute and tea were the two major export earning sectors of Bangladesh. But frequent flooding, natural disasters, and declining demand and price of jute fiber in the global market caused massive unemployment in Bangladesh short-after. In the backdrop of declining contribution of agrarian sector in the country's GDP, RMG sector emerged as a major contributor to the exchequer in the beginning of the 90's (Md. Saiful Islam, Abdur Rakib, Atm Adnan, 2016; Nuruzzaman Md, 2013). The RMG sector started its journey in the 1980s in Bangladesh. From FY1983-84 to FY2013-14 the contribution of the RMG sector in total export has grown from 3.89% to 81.13%, contributing a significant 14.07 percent into the national GDP (Md. Saiful Islam, Abdur Rakib, Atm Adnan, 2016). According to WTO's World statistical review 2023, Bangladesh is ranked as world's-second largest garments exporter as a single country with $45 billion export in 2022 (Zaman Arif Uz, 2023). Hossain Md. Sahid, (2019) predicted that Bangladesh has the potential to be the world's largest apparel exporter if the growth continues. Extant literature points that the three parameters- cost, quality, and lead time for apparel retailers are critical (Islam Md. Saiful et al., 2016; (Kader Mohammad Shahidul & Akter Maeen Md. Khairul, 2014; Nuruzzaman Md, 2013). Bangladesh has attained competitive edge in terms of cost and quality but due to poor logistics management, Bangladesh frequently ranked low in delivery time and target fulfillment (Kader Mohammad Shahidul & Akter Maeen Md. Khairul, 2014). According to Kader Mohammad Shahidul & Akter Maeen Md. Khairul, (2014) Inefficiencies in backward linkages, buyer order processing systems, backdated production systems, low productivity, weak infrastructure, poor port facility, and lack of deep-sea ports attributes to poor lead-time in the RMG sector. In addition, Mohammad Golam Sarwar & Tapash Mazumder, (2022) identified utility shortage as a major set-back for the RMG sector of Bangladesh. Islam Md. Saiful et al., (2016)also identified inefficient managerial skill and lack of integration as major drawbacks. Building multi-modal transport, sound infrastructure facilities including a consistent supply of energy through public-private initiatives can help reduce the transport and transaction costs and overcome existing challenges (Hossan Sajjad, 2021; Islam Md. Saiful et al., 2016; Nuruzzaman Md, 2013).

2.2 Geographical Distribution of RMG Factories

As of May 2023, a total of 3,723 factories is operating as export-oriented ready-made garment (RMG) factories across Bangladesh among which 2706 factories are members of the BGMEA and BKMEA but other 1046 factories are operating without being listed (*Mapped in Bangladesh – MiB*, n.d.). According to the current census only four districts namely, Dhaka, Gazipur, Narayanganj, and Chattogram—locates majority of the RMG factories. In the southwest region (Khulna and Barisal division), only 6 garments factories have been founded among those only 4 factories (Uni World BD Ltd., Sun Apparels Ltd., Chowgacha Fashion Ltd., and Divine Garments Ltd.) are members of BGMEA, and other 2 factories (Pretty Wool Wear Ltd. and Urfi Apparel Park Ltd.) are non-members (*Mapped in Bangladesh – MiB*, n.d.).

2.3 Padma Multipurpose Bridge and its Contribution to Industrialization in Southwestern region

The Padma Bridge will provide a fundamentally missing link for Bangladesh's transportation. To supplement the construction of the Padma Multipurpose Bridge, the Bangladesh government intends to establish roads, railways transmission, and telecommunications organizations (Jalil & Mia, 2021). The Padma Multipurpose Bridge's construction will link the country's southwest region to the national electricity grid. By bringing the power required for industrialization to the doorsteps of regular people, the bridge will enable a variety of industries to develop in the area, thereby increasing the country's economy (Md. Munirul Islam et al., 2020b). The Trans-Asian Railway and Highway will be connected to the southern region of the nation through the bridge. Bangladesh will be able to communicate internationally with Bhutan, Nepal, and India. On both sides of the bridge, economic zones, high-tech parks, and private industrial cities will be constructed (Rabbani Golam, 2022). (Raihan & Khondker, 2010)predicted increased foreign-direct investment and new employment for southwestern population. According to estimates, the Padma Multipurpose Bridge will increase the nation's annual GDP by 1.23 percent and the GDP of the southwest by 2.5 percent (Ali Mohsin, 2022). Researcher predicts that Padma Bridge will increase the cargo handling efficiency of Monga port, which now remains underutilized (Ali Mohsin, 2022). BSIC source claims that in the next ten years, 500 to 1000 industries in various sectors will be built in 6 districts of the Barisal division. Trade between India, Nepal, Bhutan, and Bangladesh through the area will expand if demand for gas, power, internet, and infrastructure in the southwest can be addressed. The southwest's economic environment will consequently observe a gradual transformation (Rabbani Golam, 2022).

2.4 Impact of Padma Bridge on the RMG Factories in Southwest

The concept of agglomeration economies provides a useful lens to understand the potential impact of Padma Bridge on Bangladesh's RMG industry. Agglomeration economies concept refers to the productivity and efficiency gains arising from firm's clustering near to each other, benefiting from the shared infrastructure, common labor, input-putput linkage, and knowledge spillovers (Krugman Paul, 1991). As stated before, historically Dhaka, Narayanganj, and Gazipur locates majority of the RMG factories, creating proximity to suppliers, buyers, and workers. Post-Padma Bridge the transportation time and logistics costs significantly dropped between capital Dhaka and the Southwestern region. This serves as a catalyst for industrial relocation and the potential for new RMG clusters in Jeshore, Khulna, and Barisal. Empirical studies from other developing countries also offer valuable insights into the agglomeration impact of large-scale infrastructures (Ghani et al., 2016; ADB, 2012). Ghani et al. (2016) found that India's Golden Quadrilateral highway network completed in 2012 connecting four major cities of India significantly boosted manufacturing firm's entry into the previously disconnected market. It also increased productivity of the existing and new firms. In Vietnam, the expansion of national road and expressways, railways, and urban transits has greatly supported the garment clusters outside Hanoi and Ho Chi Minh City (ADB, 2012). This greater connectivity has driven better access to ports and labor markets for the previously underprivileged locations. Thus, informed from the existing literature this study assumes that improved connectivity post-Padma Bridge will open up new geographical opportunities for the RMG sector of Bangladesh. However, existing agglomeration literature also argues that infrastructure alone is not sufficient to capture the full benefit of agglomeration. Complementary policies, streamlined regulations, generous strategic investment incentives, and integrated regional development strategies must be in place to untie the full economic benefit. From the beginning of the planning of building the Padma bride, much research has also taken place about its benefits, contribution, and impact on the economy of Bangladesh which made it clear that the bride is going to bring revolution in the southwest in terms of multiple aspects. The positive impacts of Padma Bridge on the region are improved communication, quicker travel time, reduction of distance, increased safety of public lives, utility supply (electricity, telecommunication, and gas), cost reduction on producing agro-products, industrialization, and improvement living standards (Md. Munirul Islam et al., 2020a). Besides, the RMG industry is a common topic for researchers and many studies have taken place from all possible aspects. But after the inauguration of Padma Bridge, thoughts are rising concerning the impact of Padma Bridge on the apparel industry and many news reporters have started to write articles concerning the topic. The Khulna Chamber of Commerce reported that the bridge is providing connectivity by linking Dhaka with the Mongla and Payra ports. In contrast to the present distance of around 264 km between Chittagong Port and Dhaka, the bridge has cut the journey from Mongla Port to Dhaka by more than 100 miles to 170 km (Ali Mohsin, 2022). As the backward linkage of our apparel industry is based on imported raw materials and most of the Factories are 100% export-oriented, the Chittagong port is used for all imports and exports. Because of the excessive pressure in one port, the clearance process is very time-consuming and the distance of the port is also high from Dhaka compared to Mongla port. Time is the most critical factor in the reputation of the textile industry, and quality control needs accurate and top-notch raw materials (Rabbani Golam, 2022). As most of the Apparel factories are located in Dhaka manufacturers are choosing to use Mongla port in the southwest. Mongla Port is really bustling right now, with lots of new exporters deciding to use it and taking advantage of the Padma bridge. The first clothes were shipped out of the port in July of 2022, right after the bridge was opened. On June 6th, a Singapore ship sailed from Mongla to Poland, carrying clothes made in 10 different factories (Islam Akramul, 2022). The travel facilities for the workers will be one of the biggest advantages of the industry. A lot of people work in the textile sector in the country, mostly from Barisal & Khulna (Rabbani Golam, 2022). Most importantly, the Padma Bridge will improve Bangladesh's connectivity with various countries such as India, Nepal, and Bhutan. This will encourage domestic and international investors to build new industrial plants and entrepreneurs in Bangladesh. New textile plants will be established in the southwest part of Bangladesh (Rabbani, 2022). Geographical positioning of any company or manufacturing factory is a strategic decision. For location decisions to establish a manufacturing operation, some common factors need to be considered. Basically, the top five things that could have a big impact on international location decisions are cost, infrastructure, people, government, politics, and economics. And other 10 sub-factors are quality of labor, transportation, availability, utilities, wages, motivation, telecommunication, and government stability and laws (MacCarthy & Atthirawong, 2003) .Traditionally, the objective of location decisions has been to derive a cost-optimal distribution of facilities with respect to the location of markets (customers) and raw materials (suppliers). More recently, access to skills and knowledge has been added as a major strategic factor that affects location decisions (Chen et al., 2014a) .The value of employing the resource-based view (RBV) and transaction cost economics (TCE) is also important for manufacturing location decisions (Mcivor, 2013).

However no published research has been found combining all these three areas, about the impact of Padma bridge on the growth of the RMG sector in the southwest region of Bangladesh. This paper has tried to find out whether the Padma Bridge is developing the southwest region in a way that can contribute to the growth of RMG by providing advanced locational advantages for apparel manufacturers in the southwestern region of Bangladesh.

3. Methodology

3.1 Research Approach

An exploratory and qualitative research approach was adopted to investigate in-depth insights about the contribution of Padma Bridge to the growth of RMG in the southwestern part of Bangladesh and achieve the objectives. These insights were obtained by examining the perspectives of apparel factory owners/entrepreneurs, managers and workers. This method was chosen because it is considered a suitable approach for comprehensively understanding complex issues that involve intricate details and multiple levels of analysis (Saunders & Briststow, 2016).

3.2 Data Sources, Sample Size and Technique

Both primary and secondary data sources were used in this research to enhance the accuracy of the research results. For primary data, we conducted interviews with participants from different factories until we reached a point where their responses became repetitive, and we achieved theoretical saturation, as suggested by Soundararajan and Brown in 2016. Some researchers who employ thematic analysis have argued that saturation can be reached with as few as 6 to 12 interviews (Soundararajan & Brown, 2016). Furthermore, our sample participants were purposefully selected based on criteria outlined by Soundararajan and Brown in 2016. These criteria included evaluating their level of involvement and importance within the research context (e.g., Bangladeshi apparel supply factories and their relevant stakeholders), their accessibility for interviews, and their voluntary participation in the interviewing process. As reported in Table 1, the participants of the research interview were the garments managers

(9 key managers of 7 garments) and 10 garment workers. In this paper, the main secondary data sources were news reports available on the internet and relevant companies and authorities' websites, etc.

Table 1. *List of semi-structured interviews*

Serial no.	Designation of the respondents	Company Name	Size of Company	Location
Interview- 1	GM (HR & Compliance)	F. K. Ltd.	Large	Kayempur, Narayangonj
Interview- 2	GM (HR & Compliance)	F. A. Ltd.	Large	BSCIC, Narayangonj
Interview- 3	MD/ Entrepreneur	F. T. K. Ltd.	Medium	Fatullah, Narayangonj
Interview- 4	GM (HR & Compliance)	N. R. Group	Large	Banani, Dhaka
Interview- 5	Director / Entrepreneur	E. S. Ltd.	Medium	Fatullah, Narayangonj
Interview- 6	DGM (Operations)	E. S. Ltd.	Medium	Fatullah, Narayangonj
Interview- 7	Director (Accounts)	Fu. K Ltd.	Medium	Fatullah, Narayangonj
Interview- 8	Director/ Entrepreneur	S. K.	Small	Kotalarbag, Narayangonj
Interview- 9	GM (Admin)	S. K.	Small	Kotalarbag, Narayangonj
Interview- 10	Worker 1	F. K. Ltd.	Large	Kayempur, Narayangonj
Interview- 11	Worker 2	F. K. Ltd.	Large	Kayempur, Narayangonj
Interview- 12	Worker 3	F. T. K. Ltd.	Medium	Fatullah, Narayangonj
Interview- 13	Worker 4	F. T. K. Ltd.	Medium	Fatullah, Narayangonj
Interview- 14	Worker 5	E. S. Ltd.	Medium	Fatullah, Narayangonj
Interview- 15	Worker 6	E. S. Ltd.	Medium	Fatullah, Narayangonj
Interview- 16	Worker 7	S. K.	Small	Kotalarbag, Narayangonj
Interview- 17	Worker 8	S. K.	Small	Kotalarbag, Narayangonj
Interview- 18	Worker 9	F. A. Ltd.	Large	BSCIC, Narayangonj
Interview- 19	Worker 10	F. A. Ltd.	Large	BSCIC, Narayangonj

Source: Prepared by the author.

3.3 Data Collection Methods

For data collection, this research used "semi-structured interviews". A semi-structured interview is a qualitative research method that allows the interviewer to divert from the pre-determined questions to explore particular themes further (Saunders et al., 2015). The owners, managers, workers of the garments and relevant stakeholders were interviewed with open-ended semi-structured questions.

3.4 Data Analysis Techniques

For the analysis of the collected data, "thematic analysis" technique was used (Braun & Clarke, 2006). This method was chosen due to its flexibility in examining in-depth textual data regarding the challenges and prospects of the Padma Bridge towards the growth of apparel industry and its support for qualitative data analysis. Thematic analysis is one of the most commonly used data analysis techniques within qualitative research where collected data are analyzed to identify patterns across the data to derive themes (Soundararajan & Brown, 2016). In this research, garments managers' and workers' views, opinions, knowledge, and experiences are considered as data sources.

4. Data Analysis, Findings, and Discussion

4.1 Challenges of the RMG Sector at the South-western Location

Before the opening of the Padma bridge, the southwest region was one of the less developed parts of Bangladesh because it was separated from the capital Dhaka and the rest of Bangladesh by the mighty river Padma. Now as the Padma bridge is established, the southwestern region will see rapid developments in different sectors, especially the industrial sector. According to the Ministry of Finance (MoF), The broad industry sector of Bangladesh includes five sectors (mining and quarrying, manufacturing, electricity gas, steam and air condition, water supply and construction) but the manufacturing sector contributes the most in the total GDP. The heart of the manufacturing sector in Bangladesh is the Garments (apparel & textile) industry. As the southwest region is relatively less developed, the Garments industry may face different challenges to growing there.

4.1.1 Inadequate utility facilities in the southwest location

To run the garment industry, it is a must to have proper utility support. So, when a garment manufacturer decides to build a factory in a certain location, firstly they examine whether there will be a constant supply of utility services. The factories will require a commercial gas line, as they need a huge amount of uninterrupted gas supply in the manufacturing process. Day by day garment factories are becoming more machine intensive because they have to be efficient and effective in producing garment products to be competitive in the international market. So, in their production process, a consistent power supply is compulsory.

"*Gas and electricity are the heart of our production process. If any of these utility services go missing, our production will stop. And we can't produce and deliver the order in due time. In the southwest, we can't have proper utility service." (GM (HR, Admin &Compliance), S.K. Ltd.)*

From the above participant's view, it is clear that a proper supply of gas and electricity is the first and most important requirement of garment manufacturers. According to him, the southwest is not enough developed for providing utility support.

"*We are optimistic that more RMG and Textile industries will be established in the southwest region following the Padma bridge inauguration. But there is no gas supply there. the power transmission lines also remain incomplete. We have electricity, but the proper lines are not there to use it. Using the bridge for transportation will not help to get good value out of this bridge, the government needs to complete the project on schedule time." (GM (HR & Compliance), F.K. Ltd.)*

According to the above respondent's view, there may be plenty of opportunities developing for the RMG industry in the southwest but until the opportunities and possibilities become real, the investor will not risk their money by investing in this region. After the inauguration of the bridge, possibilities are increasing. A 163-km gas transmission pipeline has already been constructed by Gas Transmission Company Ltd. (GTCL) from Bheramara in Kushtia to Aranghata in Khulna via Jhenaidah-Jashore so that economic zones, export processing zones, and the industrial belts under BSCIC in Khulna, Jashore, and Jhenaidah can get gas supply (Habib Ahsan et al., 2022). Because of the Padma bridge, industrialization will take place in the southwest and the electricity demand will increase from 667 MW to 930 MW. So, the WZPDCL (West Zone Power Distribution Company Ltd) is increasing the distribution line by about 1200km in the Khulna- Bagerhat area, six substations and another 22 substations which will supply power to the other 21 districts in the southwest areas (Habib Ahsan et al., 2022).

"The southwest becoming attractive because surrounding the establishment of Padma bridge gas and electricity connections are developing. As gas is found in the Bhola district of the southwest region and a new power plant has been established in Patuakhali, Barisal. So, in the future, this region will be rich with gas and electricity facilities and industries will develop there." (GM (HR & Compliance), N.R. Group Ltd.)

He has pointed out what development activities are happening in the southwest region to ensure utility services. The utility is like the gate of industry growth, when this service will be available the gate of industrialization will open for the garment industry to grow in this region. Almost all of the respondents agreed on the importance of gas and electricity. But by looking at the present situation, referred data sources and interviewers' views suggest that most of the garment manufacturers are not interested in investing now because of the lack of utility.

4.1.2 Unestablished supply chain facility in the southwest region

Large manufacturers can manage to do the whole process from spinning to the final product on their own. But medium and small-size garment manufacturers can't manage the whole process from yarn spinning to the making of final products on their own. They depend on each other and work as supporting partners in the manufacturing process. Staying close to those supporting factories is one of the factors they consider when selecting a location for establishing a garment factory.

"Our raw material is dyed yarn of which 60% is brought from the local market and 40% imported. We can't move to any location without the supporting industry around us. To add more value to our products, we need to use more local yarns. if we stay close to supporting yarn-dying factories. It will be easier for us to take the product from them at less carrying cost instead of importing 100% dyed yarn from abroad." (Executive Director, Fu. K Ltd.)

According to him, garment factories need to stay closer to their supporting partners so that they can take support from them in the production process to add more value to the product. In the southwest region, no supporting industry has developed yet.

"We have 5 yarn-spinning factories in Bhaluka, Mymensingh. We supply yarn all over the country. All the knitting garment factories buy yarn from us. If the garment manufacturers buy yarn from the local market for making products to export, the government gives them a 3% incentive because it will add value to the product." (GM (HR & Compliance), N.R. Group Ltd.)

Two of the above respondents are trying to focus on the importance of adding more value to the garment's products. BGMEA is focusing on producing garments with more added value, and the government is offering incentives to manufacturers who are using local products. To take the opportunity of getting incentives, producers want to buy from the supporting factories. The carrying cost will also decrease by staying closer to them. Another factor the respondents agreed upon is that they need to stay close to their supporting industries because they have to finish the committed order in time. If they stay in a closer location, carrying time and cost will be lesser and they can hold more profit. According to them, in the southwest, they will not have the support of a backward linkage supply Chain around them which will increase the carrying cost and lead time. For medium and small-size garment manufacturers to find buyers, the best location is to stay in industrial zones like EPZ, Economic Zone, and BSCIC because full utility support and supporting industry work together in there. Until the supporting industry doesn't grow in the southwest finding buyer will be also difficult. So unestablished supply chain facility is a major disadvantage of the southwest region.

4.1.3 Less organized and technologically undeveloped port facility

The Ready-made Garments of Bangladesh are fully export-oriented. As the backward linkage supply chain of the garments industry in Bangladesh is not well established, manufacturers need to import most of their raw materials (Nuruzzaman Md, 2013). And ultimately, they have to export the final products in time. One of the reasons that caused an increase in the lead time is the poor port facility and manufacturers' failure to deliver on time leading to a reduction of competitiveness. In the present situation in terms of transportation facility provided by Padma Bridge, the Mongla and Payra port seems closer and more convenient compared to the Chittagong port but almost all of them didn't agree to use the ports in the southwest in exchange for Chittagong port.

"How Chittagong port is organized and the facilities garments exporters are easily getting in this port are not available in the ports of Southwest. The Mongla and Payra port facilities are still not

easygoing for us, the government needs to accurate this. On the other hand, buyers need to be patronized to use Mongla and Payra port." (GM (HR & Compliance), F.K. Ltd.)

The above respondent's view indicates that the reason behind the uninterest is the absence of proper facilities in the southwestern ports. Another factor he pointed out is that the buyers also need to be encouraged to use Mongla or Payra Port. According to the respondents' views, ports in the southwest are less organized, technologically underrated, have lower capacity, lower manpower, insufficient depth of the naval channel, etc. Although the government has taken many projects to develop the ports in the southwest, the garment manufacturers will not use that port until the facilities are properly ensured. Besides the seaports, three land ports situated in the southwest are facing the same problem.

"Because of a lack of proper development of Mongla seaport and Benapole and Bhomra land ports, investors will not be encouraged to come to the southwest region." (President of KCCI)

According to the respondents' views, those land ports also have a poor management system, container vehicles have to wait in long queues for days which makes these land ports relatively inefficient. So, it is clear that because of poor port facilities garment manufacturers are not using ports in the southwest. Other factors like comfortability and habitation also affect their interest to use Mongla and Payra ports.

4.1.4 Locational disadvantages in the southwest region

After the inauguration of the Padma bridge, from the initial view, it seems like the connectivity of the southwest with Dhaka has been established successfully. But inside the southwest region, the infrastructure is still not well developed. Roads are narrow, and gas and electricity services are not proper yet. These are the major obstacles in the way of industrialization. (Habib, 2022). According to the respondents' view, one of the locational disadvantages holding them back to invest in the southwest is the absence of STP. In the southwest region, the government still hasn't developed a proper sewerage system to manage the industrial waste flow. The southwest region of Bangladesh is well known for its agricultural contribution. If the garments industry establishes in the southwest without managing proper STP, the soil will be contaminated with toxic chemical waste. The agricultural sector may have to face a huge loss.

"As garments is a labor-intensive industrial sector. Workers are our main asset in garment manufacturing. Most of the garment workers come to Dhaka from rural areas where citizen privileges are not provided properly. In Dhaka city, they can get full citizen privileges easily." (GM (HR & Compliance), F.K. Ltd.)

The above respondent's view indicates that proper citizen privilege needs to be ensured in the southwest for the workers to encourage skilled workers to move there. The government will need a long period to ensure these privileges in the southwest. This is one of the challenges of the southwest in front of industrialization. Considering all these facts, the southwest is a little underrated location for industrialization. After considering all respondents' views and from the secondary sources these locational disadvantages have been identified.

4.2 Opportunities of the RMG Sector in the South-west Part of Bangladesh

Because of the Padma bridge, enormous opportunities have emerged in the southwestern part of Bangladesh for the growth of garment factories in that area. Considering the future possibilities and available opportunities, the southwest can be another lucrative location for garment manufacture to grow the industry there.

4.2.1 Availability of Major Sea and Land ports in the southwest region

One of the most important factors garments manufactures want in a location is the availability of port. After Chittagong port, two major sea port (Mongla and Payra port) of Bangladesh are located in the southwest region and three major land ports (Benapole, Bhomra & Darshana) are also established there. The Chittagong port is the premier seaport of Bangladesh through which 90% of garments products are imported and exported. The facilities of Chittagong port have not increased like the increase in export volume so the port is running out of capacity (Prothom Alo, 2019). The containers are kept stuck in the port for even 15- 20 days though they are supposed to be released within 3 days. Besides the capacity problem, the distance from Dhaka to Chittagong port is 280km which takes a whole day to reach the port. The absence of Chittagong port's capacity handling facility and the larger distance from Dhaka in causing an increase in the lead time. The average lead time of the RMG sector in Bangladesh is 100 days while the lead time in China ranges from 30 to 60 days (Kader Mohammad Shahidul & Akter Maeen Md. Khairul, 2014). Establishment of RMG industry in the southwest region can be a solution of increased lead time. The Padma bridge narrowed the distance between Dhaka and Mongla seaport to 170km from 274km which means the bridge has reduced about 100km distance and made transportation faster and cheaper (Parvez Sohel, 2022). And by exporting through ports in southwest exports can avoid the consequences of capacity problem.

"After the inauguration of Padma Bridge, we are one of the 27 factories that taken the first attempt to export ready-made garments through Mongla port. Compare to the Chittagong port the transportation cost is lower in Mongla port and also saves time. Because of less distance from the capital, exporting through Mongla port saves our 25-30% transportation cost." (GM (HR & Compliance), F.A. Ltd.)

According to the above respondent, they have already experienced the benefits of the Padma Bridge and the usefulness of Mongla port. By realizing the potential of the ports in of southwest region, the government has also taken many projects to develop the port facility. Besides the sea port, lands port will also help to increase competitiveness by reducing lead time and cost. After the inauguration of the Padma bridge, raw materials can be imported from India through the lands ports in southwest.

"After the completion of the Padma bridge, of the total import from India, 80% are imported through Benapole land port because after realizing the product from the port it takes only one night to receive the raw materials. On the other hand, when products are imported by ships from any country, it takes 20-30 days to maintain each process of shipment." (GM (HR & Compliance), F.A. Ltd.)

The above respondents' views indicate that because of the Padma bridge a direct connection has been developed from Dhaka to Benapole port, it will make raw materials import from India easier and faster and will help to reduce the lead time. According to the respondents' views, southwest Bangladesh is a lucrative location for the Garment industry to grow because of the port availability. If garment factories are made there, they will have the advantage of less distance from the ports, easy and quick importation of raw materials, and developed ports with higher efficiency in the future.

4.2.2 Various locational advantages in the southwest region

After the completion of the Padma bridge, the southwest becomes one of the locations where the government is establishing the best transportation facility because, through the southwest region and Padma bridge, Bangladesh is going to connect with the Asian highway. Government has a further plan to construct a 236km expressway from Faridpur to Kuakata to improve the connectivity of Payra port. The bridge has also reduced the 93km distance from Dhaka to Benapole where most of the trade between Bangladesh and India takes place (Aman Hasibul, 2022). As communication has become very easy and faster, the southwest region has also become the most potential location for garment manufacturers to establish factories. According to the respondents, Garment manufacturers prefer to establish their factories in the EPZ because inside the EPZ area the manufacturers get full utility support, bonded warehouse facility, and supporting industries around them.

"If garment factories can be established in the EPZs, obviously manufacturers will have facilities. They will find buyers easily because the buyers prioritize the garments located inside the EPZ area

when placing orders. Buyers are more attracted to those garment factories because compared to others they are well-organized and workers' rights are properly ensured there." (GM (HR, Admin & Compliance), S.K. Ltd.)

The above respondent's view indicates that business development gets easy for garment manufacturers if they can place their factories in the EPZ area. At present situation, there is only one EPZ out of eight, Mongla EPZ which is located in the southwest region. The government has a plan to establish two more EPZs, Patuakhali and Joshor EPZs, in the southwest region to bring investment there. Besides EPZs, the government is setting up 17 Economic zones which will bring an industrial revolution to the southwest (Aman Hasibul, 2022). Another factor that can drive garment manufacturers in the southwest is the availability of huge land. Because of the lack of open land in Dhaka, most garment manufacturers can't plan their factory structure as they want it to be. Building their spinning mill somewhere and establishing the garments manufacturing plant somewhere else is killing their efficiency. As ports and huge open lands are available "One Stop Service" facility can be established in the southwest for the garment exporters which is demanded by the BGMEA (Saleh Noman, 2021) One Stop Service refers to providing or offering a comprehensive range of goods or services at one location. After considering all the respondents' views, the southwest region has locational advantages like Huge open land availability in the southwest, the future establishment of EPZs and Economic Zones, and already developed transportation and communication will bring advantages for garments manufacturers.

4.2.3 Large Manpower in the Southwest region

Besides being one of the major foreign earning sectors, the RMG industry emerged as a job-creating sector where neglected masses of Bangladesh, unskilled and uneducated women are employed (Nuruzzaman Md, 2013). As the RGM sector is a labor-intensive industry, the availability of workers is very important when selecting a place to establish a garment factory. Considering the factor of manpower availability, the southwest region is an attractive location to grow the RMG industry and a large number of garment workers come to Dhaka from the southwest region. The living cost is higher in Dhaka city; workers spend most of their earnings on food and house rent. For the sake of this research, 10 garment workers DB from the southwest have been interviewed and they have been asked whether they will prefer to work on the same job in Dhaka or near their hometown and whether they are ready to accept a lower wage for the job if offered near their home. All most all of the workers responded similarly because food and living cost is lower there and they can visit their family every weekend. As most of the garment workers are female, in terms of their safety they also prefer to work near their homes. The respondents (Managers) also agreed that by maintaining the minimum wage, they can negotiate the extra wage they provide to their workers for their experience and expertise as their cost will be reduced if they get to work near their home district. According to the respondent's views, workers will get a great work environment and planned accommodation which will also help to attract more buyers. Huge unskilled workers are available in the southwestern region of Bangladesh. Most of the garment manufacturers said that highly skilled workers are not required for their factory activity. But as garment industry is moving towards manufacturing high end products minimum skill is required.

"I think unavailable skilled workers in the southwest will not be a challenge for manufacturers to establish their manufacturing plant in this region. This problem can be easily solved by arranging training programs. we have a 3-month long training program to convert raw workers into skilled workers." (GM (HR & Compliance), F.A. Ltd.)

The above respondent view indicates unavailability of skilled workers in the southwest will not be a problem for them because they have training program for unskilled workers. If the garments industry establishes in the southwest region, the skilled workers from this region who works in Dhaka will move to their region and will join the factories. After considering all respondents' views, the large workforce is an advantage for garments manufacturers which will motivate them to establish garments factories in the southwest region. If the garment industry grows in this region, workers will have convenience and comfort, on the other hand, manufacturers will find low-wage workers. The agglomeration economies are important in the context of Bangladesh to untap the full potential of the Padma Bridge through improved connectivity.

5. Conclusion

RMG sector of Bangladesh has a huge potential to be the global leader of apparel export. In the backdrop of LDC graduation and the recent tariff by the Bangladesh's largest single market, it's high time for Bangladesh to proactively diversify the current RMG sector market concentration. Padma Bridge has opened a new door of opportunity to connect the southwest region to the rest of the country. Thus, this study has two major objectives – firstly, to investigate the challenges and opportunities of RMG sector in the Southwestern region, and secondly, to explore strategic suggestions to overcome the potential challenges. Nineteen Qualitative in-depth-interviews were conducted to explore the research question. Interviews with the managers and workers of the existing RMG sector suggested that post-Padma Bridge, the southwest region is getting ready with all the facilities for bringing the industrial revolution. The road and expressways in that region are improved with improved electricity and utility condition However; the garment exporters are still not motivated enough to invest there because of the major challenges identified (such as- inadequate utility supply & unestablished supply chain). If the government can complete the taken projects regarding the utility, infrastructure, ports, EPZs, and, EZs within the scheduled time, implement the suggested policy with proper accuracy and ensure proper citizen privilege, garments export will feel encouraged to invest because they want ready and immediate facility. So, temporarily it seems that the southwest is not ready for industrial activity but the proper implication of the projects southwest region will emerge as the most potential location to grow the RMG industry.

Research on the impact of the Padma bridge on the economy of Bangladesh is emerging. However, prior research didn't examine the impact of the Padma bridge on the RMG industry, and the rising possibility of the southwest location for industrialization. The current work contributes to this field of study by suggesting a new location for the growth of the RMG industry where it is possible to develop a "One Stop Service" to increase the efficiency and competitiveness of this industry. The findings of this research would help to enrich the knowledge of young entrepreneurs about the growing opportunities in the southwest region who wants to invest in the RMG sector or the supporting industry of RMG. Furthermore, the findings of this research paper will helpful to policymakers take the appropriate action to properly utilize the rising potential of the southwest region on a priority basis. For example, relevant government authorities should accelerate the development of modern infrastructure, such as industrial parks and logistics centers, with a focus on the specific needs of the apparel industry. Mutual collaboration between government agencies and industry associations should be emphasized to address industry challenges and promote growth.

Future research is required to examine how backward linkage supply chain industry can be established in the southwest region. Another sector where research is required is, what will the impact of the Trans-Asian highway and Trans-Asian Railway on the RMG industry in the southwest region in future.

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