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Just Climate Transitions in Bangladesh

Accelerating Multistakeholder
Action in Textile and Apparel
and Construction Industries

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JANUARY 2025

This report has been authored and published by FSG, with support from the H&M Foundation and Laudes Foundation. We would like to thank the 100+ Bangladeshi and international stakeholders who provided their valuable time and inputs to strengthen this study.

About this report

Since early 2024, the H&M Foundation and Laudes Foundation have been collaborating to explore scenarios that could guide Bangladesh's industry development in the face of demographic and climate-related impacts. This report, resulting from the collaboration, identifies likely scenarios for Bangladesh's industrial sectors, and opportunities to accelerate just industry transitions both through direct grant-making and multistakeholder collaboration. We believe this report can become a guide for policymakers, industry leaders, financial actors, and civil society in Bangladesh, and among financial, business, and development partners globally, to inform their own plans and contributions in Bangladesh. As philanthropic foundations, we firmly believe that just transitions cannot advance in silos and that only by working holistically—across stakeholder groups, and bridging the spectrum of decarbonisation and climate adaptation—can the economy and critical industries within it become sustainable and competitive. This is a pivotal moment in Bangladesh's journey, and we encourage all who are interested in contributing to it to join us in this endeavour.



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The H&M Foundation, funded by the Persson family, founders and majority owners of the H&M Group, supports the textile industry in halving its greenhouse gas emissions every decade by 2050, while promoting a just and fair transition for both people and the planet. Its projects target high-emission areas along the textile value chain where the H&M Foundation's philanthropic strengths can have the greatest impact.

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Laudes Foundation is an independent foundation addressing the defining challenges of our time: climate change, nature loss and social inequality. We are driven by the belief that businesses, when guided by values, rules and incentives, can be powerful agents for positive change. Our approach combines the catalytic power of philanthropy to work with and through business and industry to advance systems change.

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Executive Summary

At the 2015 UN Climate Change Conference (COP21) in Paris, 196 countries, including Bangladesh, recognised the urgent and potentially irreversible threat of climate change, and made a legally binding commitment to pursue efforts to limit global temperature increase to 1.5°C above pre-industrial levels. The **Paris Agreement also recognised the imperative of a just transition**^{1,2}. A just transition seeks to ensure fairness and inclusivity during the transition to a low-carbon economy and prioritises the creation of equitable opportunities for all members of society³. It involves **maximising the social and economic opportunities of climate action**, while minimising and carefully managing any challenges—including through effective social dialogue among all groups impacted, and respect for fundamental labour principles and rights⁴.

Just Transitions to Support Bangladesh's Development Trajectory

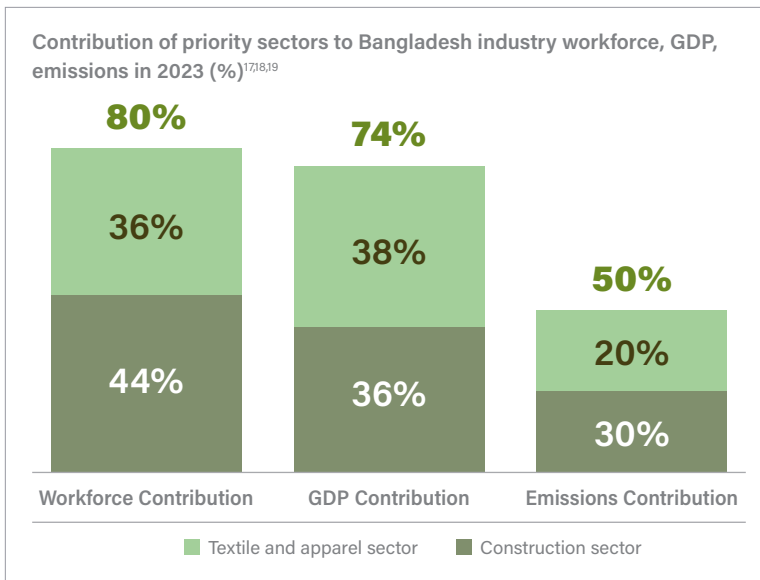
Bangladesh is a vivid example of the opportunities and risks of transitions due to climate change. The **seventh most climate-vulnerable country** globally⁵, Bangladesh is experiencing increasing incidence of extreme weather events such as heat waves, cyclonic activity, and flooding. On a business-as-usual trajectory, rising sea levels are expected to submerge about 17 percent of Bangladesh's land and displace about 20 million people by 2050⁶. Additionally, **without adequate adaptation, the country is projected to lose 4.8 percent of working hours due to heat stress by 2030**⁷.

Bangladesh's economy grew 24-fold between 1980 and 2023^{8,9}, reducing poverty rates by two-thirds¹⁰. In the same period, Bangladesh's GHG emissions increased by 176 percent¹¹. As physical risks due to climate change continue to materialise globally, the international focus on decarbonisation is expected to increase. Only with proactive investment to mitigate physical and transition risk can Bangladesh **protect its development trajectory**. Additionally, **just transitions bring opportunities for proactive businesses and countries**. Pursuing just transitions has the potential to **reduce costs** for Bangladeshi businesses through resource efficiency and low-cost energy, and enhance competitiveness of Bangladesh and of leading businesses. Just transitions also have the **potential to create new high-quality jobs** through the development of new products and services and access to new markets¹².

Proactive investments in just transitions can bring opportunities for businesses and countries and mitigate physical and transition risks.

Priority Sectors: Textile and Apparel, and Construction Sectors

Industry* has been at the heart of Bangladesh's economic growth—today, the industrial sector employs 12 million people and accounts for 34 percent of Bangladesh's GDP^{13,14}. However, it also contributes 15 percent of the country's total emissions, and this contribution is expected to rise by about five percent by 2030^{15,16}. **The textile and apparel, and construction (including brick, cement, and steel manufacturing) sectors are critical to an industry transition.** These sectors together **constitute 74 percent of the industrial sector's GDP, 80 percent of the industrial workforce, and are responsible for about half of the industrial emissions in Bangladesh.**



Industrial workers are at particular risk and have limited resilience to climate transitions due to insecure livelihoods and financial stress. About 90 percent of workers in the industrial sector are employed informally, earning an average of BDT 13,568 (EUR 140) per month²⁰, which is about 40 percent below living wage estimates²¹. Only about 22 percent of Bangladesh's population has access to any form of social protection measures²², and most programmes do not cover industrial workers²³.

For a just transition, those affected by transitions must experience inclusion, agency, and accountability²⁴:

- **Inclusion**, which ensures that workers and other vulnerable or marginalised communities are involved in decision-making processes on issues that impact them,
- **Agency**, which as a further step, ensures that workers and affected communities have the power and ability to influence decision-making, and
- **Accountability**, of companies and governments who hold decision making power, to those affected by industry transitions, particularly workers and communities.

A holistic strategy, integrating the inclusion and agency of workers and accountability to them, is essential to advance just transitions toward a low-carbon, climate-resilient economy. This report, therefore, focuses on pathways to accelerate just transitions in the textile and apparel, and construction sectors.

While climate change and the need to rapidly decarbonise is certain, multiple uncertainties could impact the pace of decarbonisation of these sectors, the ability of these sectors to adapt to climate change, and the resulting outcomes for workers. To help stakeholders identify how they can contribute to advancing just industry transitions, we offer industry-focused **scenarios that outline potential futures for transitions in the textile and apparel, and construction sectors.** These scenarios, co-created with a diversity of over 100 Bangladeshi and international stakeholders, serve

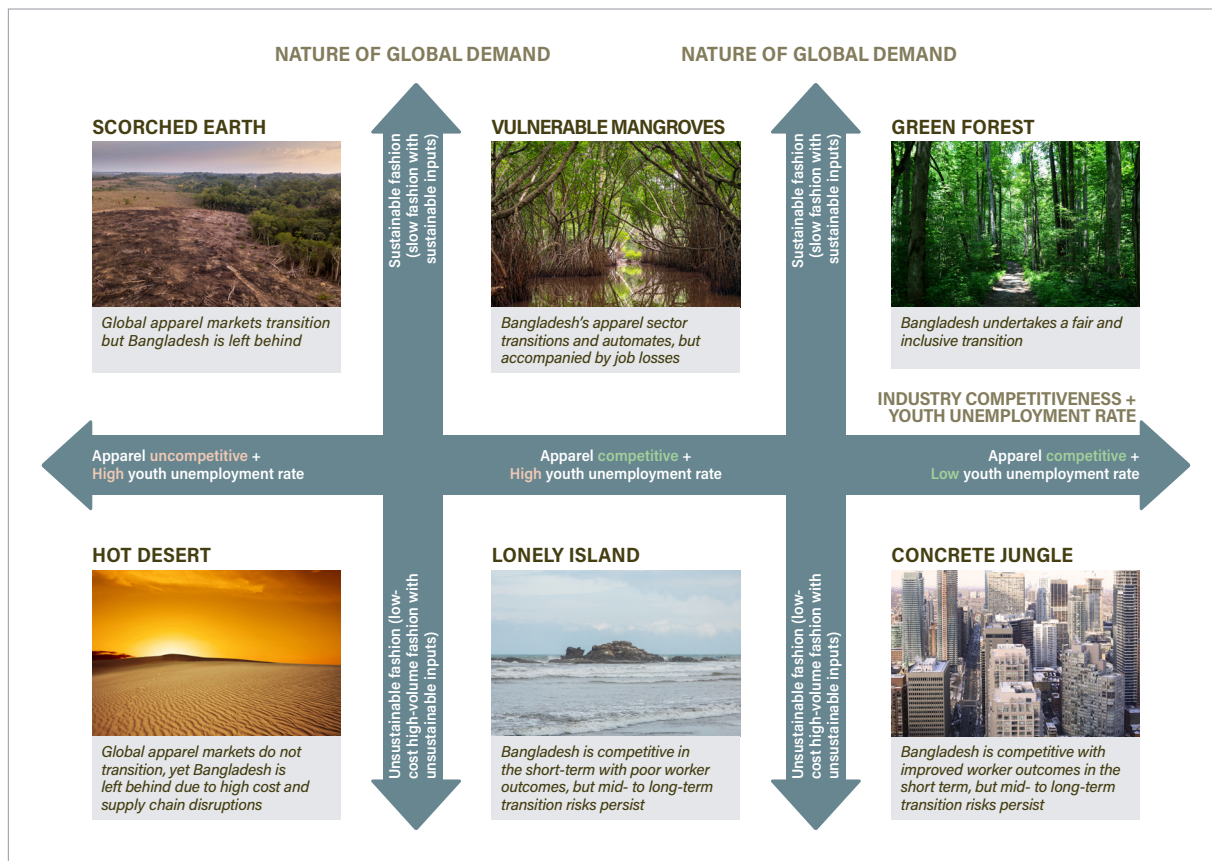
* According to Bangladesh Bureau of Statistics, industry includes five key types of activities: manufacturing; construction; mining and quarrying; electricity, gas, steam, and air conditioning supply; water supply, sewerage, waste management, and remediation activities

as a reference point for navigating the urgency, complexity, and uncertainty around the impacts of Bangladesh industry’s climate transitions on its workers. The scenarios are not predictions. Instead, they present multiple possible futures so that decision makers can explore the full spectrum of possibilities, positive and negative, expected and surprising.

Scenarios for Textile and Apparel Sector in 2030

Three key uncertainties determine how this sector might evolve going forward—the nature of global demand, the competitiveness of Bangladesh’s textile and apparel sector, and the level of national youth unemployment.

Combining these three uncertainties, six scenarios that represent divergent but possible future evolutions of Bangladesh’s textile and apparel sector emerge:



The best-case scenario, named “Green Forest”, envisions a world where:

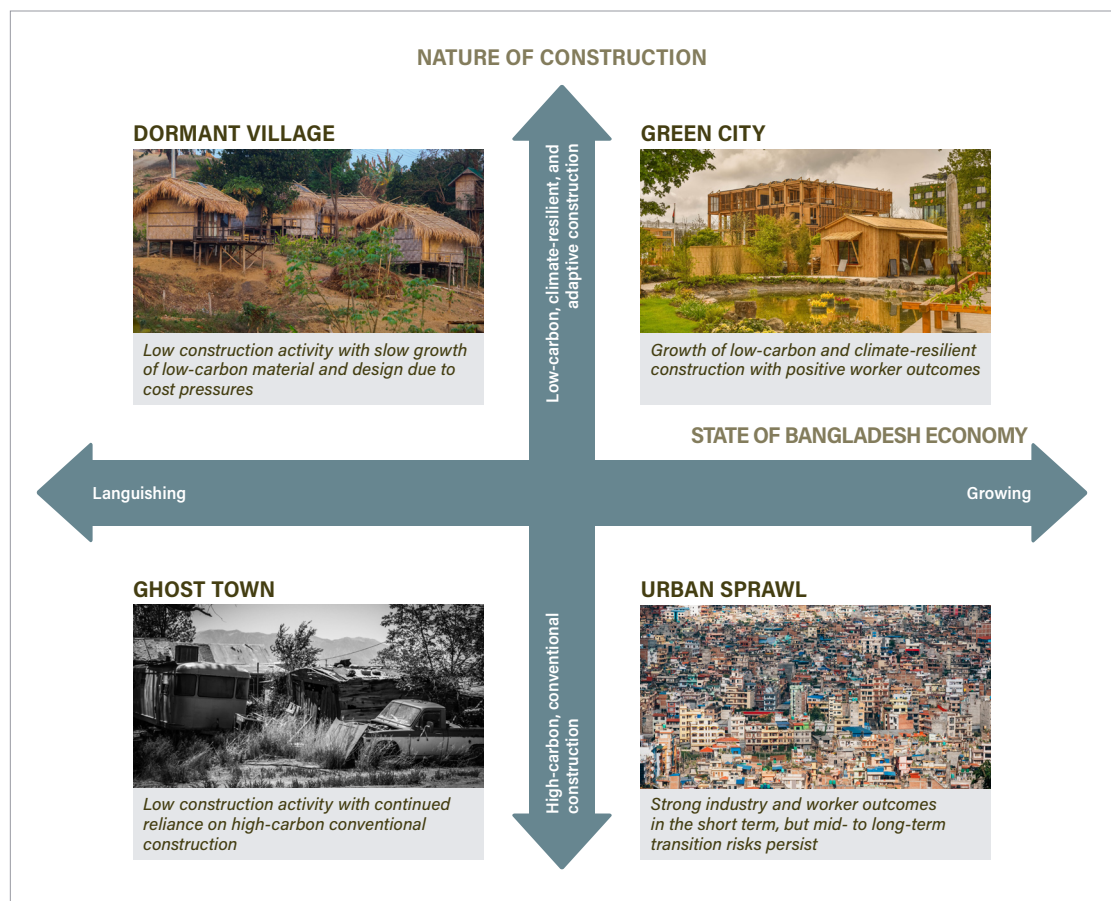
- **Sustainable fashion is the global norm,**
- **Bangladesh’s textile and apparel sector has adopted low-carbon processes, sustainable fabrics, and climate resilient practices,**
- The textile and apparel sector has prioritised **agency and inclusion of, and accountability to workers,** and
- The development of multiple other sectors has led to a low youth unemployment rate, high wages, and good working conditions.

However, five other scenarios are plausible, all of which **fail to secure the long-term competitiveness of the sector and positive outcomes for workers**. While the “Concrete Jungle” scenario—high competitiveness and low sustainability—might appear desirable as it delivers jobs and GDP, this scenario only delivers short-term gains. As broader global shifts necessitate an inevitable transition to a lower carbon economy, the Concrete Jungle scenario sets up the sector for a late and disorderly transition, severely compromising its mid-to-long term competitiveness.

Scenarios for Construction Sector in 2030

In contrast to the textile and apparel sector, the construction sector is largely driven by domestic demand. Two key uncertainties determine how Bangladesh’s construction sector might evolve by 2030—the state of Bangladesh’s economy and the nature of construction that is gaining share, i.e., conventional vs. low-carbon and climate-resilient construction.

Combining the above two uncertainties, four scenarios representing the future evolution of Bangladesh’s construction sector emerge:



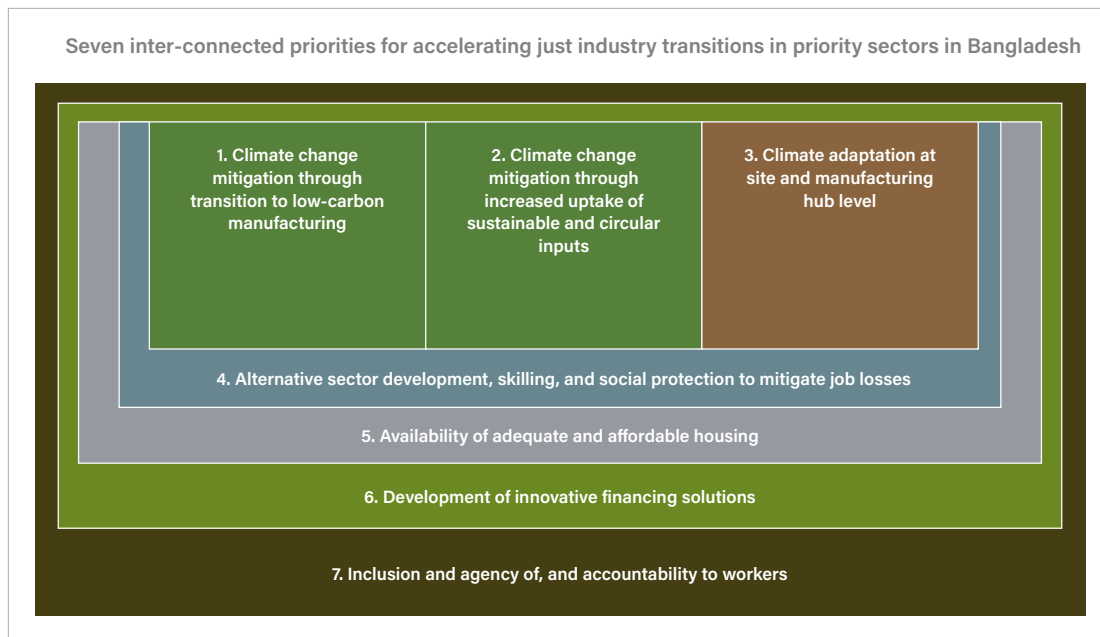
The best-case scenario, “Green City”, envisions a world where, in 2030:

- The national economy is growing,
- **Low-carbon, climate-resilient, and adaptive construction** is gaining prominence, and
- The sector **prioritises agency and inclusion of and accountability to workers**.

Three other, less-desirable scenarios are plausible for 2030—these scenarios are unable to ensure long-term competitiveness of the sector and positive outcomes for workers and their communities. While the “Urban Sprawl” scenario—growing economy, high-carbon construction—achieves short-term growth of the construction sector, it creates mid-to-long term risks for the sector, climate, and workers, with actions that are too little and too late.

Priorities for Accelerating Just Transitions

The Green Forest and Green City scenarios help secure the long-term competitiveness of Bangladesh’s textile and apparel, and construction sectors, create quality jobs, and ensure fair outcomes for workers and their communities. Stakeholder feedback clearly indicates that significant new interventions are required to fully realise the promise of these best-case scenarios. Seven interlinked priorities need to be pursued simultaneously to accelerate Bangladesh’s transition towards a more just, low-carbon, and climate-resilient future.



01 Climate change mitigation through transition to low-carbon manufacturing, including design, processes, and energy: Utilisation of **innovative processes** that reduce on-site burning of fossil fuels and improvements in **energy efficiency** and **material efficiency** of existing processes can help reduce onsite burning of fossil fuels^{25,26}, which account for 83 percent of textile and apparel sector emissions²⁷ and 80 percent of construction sector emissions²⁸. Addressing the remaining emissions from these sectors, which are from consumption of electricity from the grid, requires a combination of **decarbonisation of the grid** and switching to **onsite renewables**.

02 Climate change mitigation through increased uptake of sustainable and circular inputs: Using sustainable inputs can reduce emissions from upstream and downstream parts of the value chain²⁹, **mitigating transition risk as global and domestic demand moves towards lower-carbon production**. In the textile and apparel sector, several manufacturers are exploring sustainable and circular inputs. Similarly, in the construction sector, **compressed**



Using sustainable inputs can reduce emissions from upstream and downstream parts of the value chain.

factory infrastructure such as flood barriers, raised foundations, and drainage systems can reduce disruptions due to coastal or riverine flooding and safeguard workers' productivity. Similarly, **operational changes at factory and/or construction sites**, such as frequent breaks for rest and water, can alleviate heat stress among workers³³. **National policy protections**, including enhancement of labour laws to include specific provisions for high heat conditions and health insurance could help workers better manage the impacts of heat stress. Finally, **climate-responsive insurance** could help compensate manufacturers as well as workers for loss of earnings due to heat stress and flooding.

04 Alternative sector development, skilling, and social protection to mitigate job losses: As textile and apparel, and construction sectors transition, old roles will be phased out and new roles created. **To avoid loss of livelihoods and maximise the creation of decent work opportunities, it will be critical to ensure the development of new roles in the geographies and periods with the highest need.** Investment in existing sectors with growth potential, such as jute, healthcare, hospitality, and retail could create about 1.5 million new jobs in Bangladesh by 2030^{34,35,36}, which could be taken up by workers formerly employed in the textile and apparel and construction sectors, provided they receive skilling and placement support. Social protection, particularly unemployment insurance could provide a vital safety net as workers transition between roles.

05 Availability of adequate and affordable housing, to improve worker resilience to transitions: A significant proportion of workers in textile and apparel and construction sectors live in informal housing. They have insecure tenure, face safety risks, and lack basic facilities. This often results in them experiencing vector-borne diseases, greater incidences of

stabilised earth blocks (CSEBs) and jute-based bricks, which do not require baking in a kiln have lower embodied carbon than conventional clay bricks^{30,31}. **Constructing buildings in layers, and disassembly instead of demolition can allow for reuse and recycling** of construction material, including wood, steel, glass, and concrete³².

03 Climate adaptation at site and manufacturing hub

level: Climate change-induced heat stress and high vulnerability to flooding are already impacting worker productivity and causing supply chain disruptions in the textile and apparel sector in Bangladesh. **Resilient public infrastructure** in clusters where textile, apparel, and construction material factories, and workers' homes are located can help reduce manufacturing and supply chain disruptions. **Improved**

flooding, poor ventilation, and lack of electricity, which can exacerbate impacts of heat stress³⁷.

Affordable housing, with basic facilities can help improve the resilience of workers to the impacts of climate change, protecting the competitiveness of the industries they are employed in. Policy support, development of land banks serviced with basic infrastructure by government agencies (e.g., municipalities or district administrations), simpler and expedited approvals for affordable housing projects, and access to low-cost financing can all help scale adequate and affordable housing for workers in these sectors.

06 Development of innovative financing solutions: While intergovernmental organisations and several international government partners are taking action to improve financing in Bangladesh, further financing is needed, including from **the private sector and philanthropy, which have distinct roles in closing the significant finance gap that exists today.** Derisking instruments, such as blended finance, guarantee mechanisms, Islamic finance, and thematic bonds could play a critical role in unlocking capital for just transitions. Financing instruments should be designed to take a holistic approach aggregating a package of opportunities which incorporate social equity considerations, diversify risk, and reduce transaction costs³⁸.

07 Across all of the above, a prioritisation of the inclusion and agency of and accountability to workers involved: Integrating lived experience of workers in the planning and execution of decisions that could impact them is essential for successful implementation. For example, workers are best placed to advise on the implementation of adaptation measures to improve their own resilience and productivity. To ensure local support for transitions, where old roles become redundant, workers should be involved in planning and negotiating their own transitions. Additionally, it is important to provide capacity building to enable workers to access roles with better pay either within their own sector or other sectors, and where relevant, to start their own enterprises. Collectivisation of workers (including those employed through third-party contractors or intermediaries) to be able to negotiate for workers in the design and implementation of those plans, and a supportive legal framework can significantly strengthen agency and inclusion of, and accountability to workers.

Integrating lived experience of workers in the planning and execution of decisions is essential for successful implementation.

This report shares examples from within Bangladesh and internationally, which illustrate action already being taken to implement these priorities.

Call for Multistakeholder Action to Accelerate Just Industry Transitions

Bangladesh's textile and apparel and construction sectors, and workers in these sectors, face significant physical and transition risks, and if they proactively adapt and invest, significant opportunities. A coalition of actors that can define and build momentum behind a vision of climate resilient development can help Bangladesh meet its sustainable development goals and



unlock capital to drive this growth through international climate financing.

Together, businesses, workers and their representatives, policymakers, development organisations, skilling providers, finance, and philanthropy can develop new approaches and accelerate and scale good practices already being undertaken within Bangladesh. **To ensure swift transitions to a low-carbon resilient industry, it is critical that workers are included and have an ongoing say in the planning and implementation of initiatives.**

- Building on respect for fundamental rights to freedom of association and collective bargaining, **employers/suppliers** can be proactive in seeking worker input on transition plans from the early stages of decision-making through to implementation.
- **International buyers** can support and hold suppliers accountable for respecting workers' rights through transitions and support workers' inclusion in sectoral and national-level dialogue. They can also provide confidence for private and public investment through long-term commitments to source sustainably from Bangladesh.
- **Financial institutions and philanthropic funders** can take a holistic approach as they design transition funding, committing to packages of measures that incorporate just transition principles especially in the governance of funding mechanisms.
- The **Government of Bangladesh** can play a critical coordinating role amongst all these stakeholders, providing the stability and confidence for both industry and finance to invest for the long-term, and structuring policies to improve inclusion of and accountability to workers.

We offer this report to develop a common understanding amongst stakeholders within Bangladesh and its international partners, as a call for increased complementary and concerted action across all stakeholder groups. **Only together can we secure a green and equitable future for Bangladesh industry, and for the workers who have made its historic economic growth possible.** To learn more, you can reach out to us at info@fsg.org.

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NOTES

A series of horizontal dotted lines for writing notes.



THE AUTHORS WISH TO EXPRESS THEIR GRATITUDE TO:

100+ Bangladeshi and international stakeholders for their time and inputs which helped shape this report.

Charlotte Brunnström, Linda Hilmgård, and Fernanda Drumond from the *H&M Foundation* and **Sarah Ong, Faiza Farah Tuba, Lakshmi Poti, Nazakat Azimli, and Naureen Chowdhury** from *Laudes Foundation* for their invaluable guidance and thought leadership.

Ainee Islam, Ahnaf Tahmid, Md. Mostafa Sorower, and Kashfia Kayes from *The Asia Foundation*, for their significant support and contributions throughout the scenario planning process.

Annabel Short from *It's Material*, **Anthony Dane** from *Southern Transitions*, **Ameer Azim** from *BSR*, **Masrur Reaz, Md. Ziaur Rahman, and Hasnat Alam** from *Policy Exchange*, and **Dan Firger** from *Great Circle Capital Advisors* for providing valuable peer review inputs that helped strengthen the report.

Latika Murarka, Vedika Gupta, Kriti Chaturvedi, Gaurav Bajaj, and Sarthak Shah from *FSG* and **Umang Kapadia** (ex-FSG), for their research and analysis support, which was essential to the writing of this report, and **Youri Tabet** for his inputs guidance throughout the analysis and report development process.

Sagnik Chowdhury from *FSG* for his role in the copy-editing of this report.

Usha Sondhi Kundu from *Cognitive Designs* for her role in designing this report.

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