

Globalisation and the Alleviation of Poverty

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For developing countries, integration into the international economy through trade liberalisation is one of the most basic aspects of globalisation. Trade liberalisation is expected to increase export earnings by removing the bias against exports generated by a domestic market protected against import competition, and to improve the efficiency of import-substituting industries by subjecting them to competition. Increasing exports also offers gains through the potential realization of economies of scale and through exposure to international competitive standards and technology. Trade liberalisation carries risks too, however, in particular to firms subjected to sudden import competition, and to the workers employed by them.

A central concern of the international development community and of international aid donors is the relation between globalisation and poverty (World Bank 2002a, JICA 2001). Globalisation appears to create both winners and losers, and thus has the potential both to alleviate poverty and to intensify it. A more informed view is needed of whether globalisation is working well or badly for the poor (Stiglitz 2002: 4-10), which is then a starting point for policy to make globalisation serve the poor better (DfID 2000). As part of a research project on globalisation,¹ this paper reports on research focussed mainly on South Africa and Vietnam,² using trade liberalisation in the textile³ industry as a case study, and investigating the impacts on poverty.⁴

In a recent handbook on trade liberalisation and poverty, McCulloch, Winters

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and Cirera (2001: eg ch.6) suggested a framework of analysis in which trade liberalisation affects poverty through three main paths. First, there are the prices and distribution channels: trade liberalisation lowers the domestic prices of liberalised importable goods, for example by reducing import tariffs. It raises the domestic prices of liberalised exportable goods, for example by removing export taxes. These price changes affect the real incomes of poor consumers, particularly if the goods are important in consumption. The price changes also affect the consumption of other goods through substitution effects. Thus a fall in the price of textiles as a result of increased import competition benefits consumers, including poor consumers. The efficiency or otherwise of domestic distribution channels determine the extent to which changes in the border prices of tradable goods are transmitted to domestic consumers, especially those in inland regions. The second path consists of the effects on enterprises (and farmers): changes in the prices of liberalised importable and exportable goods and of their substitutes affect firms' profits, which then have an impact on employment or wages, or both, depending on conditions in the labour market. When workers lose their jobs, the poverty impact will depend on how quickly and at what wage levels they can secure alternative employment. The third path consists of the effects on the government fiscal position, affecting the government's ability to provide services and other benefits to the poor. For example Vietnam's switch from quotas to tariffs as the main form of import restriction would have raised revenue.

In terms of the McCulloch-Winters-Cirera framework, the present study concentrates on the second of these paths. We investigate prices⁵ only in so far as they have an impact on textile (and garment) enterprises, and leaving aside issues connected with impacts on consumers and on the government's fiscal position. The paper aims to show how firms in South Africa and Vietnam's textile sector have been affected by, and responded to, trade liberalisation, and what have been the outcomes of these responses for employment and wages. A further stage of the research, reported briefly in the present paper, looks at impacts on textile workers' households.⁶

South Africa and Vietnam were chosen for study as countries that have undertaken rapid reform of their trade regimes. In South Africa the restructuring of

the textile industry since the early 1990s has been under import liberalisation explicitly designed as 'shock treatment'. In Vietnam restructuring has been done as part of policies designed to reform the state owned enterprises that produce nearly half of Vietnam's textile output, and it has been carried out with a view to making those enterprises more competitive in international markets and against imports. In the 1990s Vietnam was one of the most rapidly growing economies in the world. South Africa had the dubious distinction of having one of the world's most unequal income distributions⁷ and one of the highest rates of open unemployment,⁸ both legacies of decades of *apartheid*, which ended in 1994.

The textile industry in developing countries illustrates many of the opportunities - and the threats - from globalisation. Typically built up under import substituting policies, it now has to adjust to increased international competition. The growth of textile and garment exports from well established producers such as China, and the increased trade in second hand clothing, has put the industry under severe pressure in many developing countries, both directly and through reduced local demand from garment manufacturers. The textile industry usually accounts for a significant share of employment and of manufacturing value added in developing countries, so adjustments can have significant local effects. Restructuring the industry does not necessarily lead to contraction across the board, however, and some firms adjust successfully and even develop new markets. Textiles are almost as important in international trade as garments.⁹ Rapid development in a range of East Asian countries has been associated not only with garment exporting but also with textile exporting.

This paper first outlines trade reform and trade performance in South Africa and Vietnam. It then considers the impacts on firms and on workers. The paper concludes with a discussion of the poverty implications.

Trade Reform and Performance in South Africa and Vietnam

South African trade was restricted by international sanctions during the later part of the apartheid era, and the country developed its manufacturing industries

mainly for the domestic market and under a highly protectionist structure of tariffs and quantitative restrictions. Vietnam was a centrally planned economy and has been liberalising its trade regime since the start of its *doi moi* reforms in 1986. It was cut off from the American market by a US trade embargo until 1994. It also faced the need to reorient its textile and garments exports after the loss of its major markets in the former USSR and Eastern Europe after their collapse at the end of the 1980s (Hill 2000).

Since the early 1990s South Africa has embarked on a rapid programme of trade liberalisation, faster indeed than it had agreed with GATT/WTO. It cut its nominal tariff on imports of fabrics from an average of 50 per cent in 1993 to 22 per cent in 2002. Tariffs on yarns were cut from 35 to 15 per cent, while those on made up textiles went down from 60 to 30 per cent. Clothing tariffs were cut from 100 to 40 per cent over the same period. These cuts understate the real reduction in protection as larger cuts were made in tariff peaks and various specific or formula duties were eliminated. Although these cuts have not reduced effective protection (that is, protection on value added) to very low levels, interviewed firms felt under severe competition from imports.¹⁰ The share of imports in apparent consumption rose from 27 per cent in 1990 to 37 per cent in 2001.¹¹ Over the same period, the share of exports in textile output from 16 to 23 per cent (Roberts and Thoburn 2003a).¹² Included in South Africa's trade reforms are standard export processing arrangements of duty drawbacks and exemptions on imported inputs for exporters. There is also an unusual (but apparently WTO-compliant) scheme, the *duty credit certificate* (DCC) *scheme*, under which exporters are given up to the equivalent of 35 per cent of the value of their exports in the form of a right to import related goods duty free up to that amount.

Trade reform in Vietnam has comprised considerably more than import tariff liberalisation, as there was a battery of controls on the export side to be dismantled and many quantitative restrictions on imports. The replacement of quantitative barriers to imports has left Vietnam with an average unweighted nominal tariff on imports of 19 per cent (World Bank Vietnam 2001a:24). On textiles the maximum tariff rate 40 per cent, except for some made up textile items where it is 100 per cent.¹³ Vietnam offers exporters duty drawback and exemption

facilities, and, unlike South Africa, also uses export processing zones. Import penetration ratios calculated for Vietnam for this research suggest that import penetration in textiles may have risen from 45% in 1994 to over 70% in 1998, although there are many data problems with these estimates (Thoburn forthcoming). These imports include fabrics for the export-oriented, foreign owned garment sector, which imports most of its inputs under export-processing arrangements.

Both Vietnam and South Africa are pursuing export led growth strategies in the context of trade liberalisation. In South Africa, the policy document *Growth, Employment and Redistribution: A Macroeconomic Strategy* stated in 1996 '...the central thrust of trade and industrial policy has to be the pursuit of employment creating international competitiveness.'. In Vietnam, the draft development strategy to 2010 called for '...a shift in investment toward labour intensive manufacturing activities in general and a shift to manufactured exports in particular' (World Bank Vietnam 2000: 12). Textiles and garments are an important element of Vietnam's export led growth policy, under which textile and garment export earnings are due to triple (Bui 2001)

Exporting from both South Africa and Vietnam are facilitated by a number of trade agreements. Vietnam signed a trade agreement with the European Union in 1992, which gave it export quotas for garments into the EU market with effect from 1993. It signed a bilateral trade agreement with the US in July 2000 (usually referred to as the *USBTA*) to give it greatly improved market access, with a cut in average tariffs faced by Vietnamese exporters from about 35% to 5% (World Bank Vietnam 2001b: 27). For textile and garment producers the impact will be greater still, with average tariffs in the US of 60% being cut to around 5%.

As with Vietnam, there are also significant trade implications for South Africa resulting from trade agreements with the EU and the US. The EU-SA Free Trade Agreement, which came into effect on 1 January 2000, provides for EU tariffs to be reduced to zero over six years, and for South African tariffs to be reduced to half of MFN tariff level over eight years. This effectively means a reduction in SA tariffs on apparel imports from the EU from 40% to 20%, on fabric

from 20% to 10%, and on yarn from 15% to 7.5%. The EU trade deal was offered to South Africa after that country's failure to gain preferential access under the EU's Lomé Convention in the 1990s. The United States *Africa Growth and Opportunities Act*, which came into effect in early 2001, provides qualifying countries with reduced duties for exports of clothing to the US market for an initial period of eight years. In South Africa garment exporting under AGOA benefits the domestic textile industry through its local (African) content provisions. Three stages of processing (that is, garments and fabric and yarn¹⁴) must be completed for products to qualify, while in less developed African countries only one stage is necessary in the first four-year period, allowing imported fabric to be made-up into clothing. South African textiles will benefit from supplying the domestic and regional clothing industry because countries such as Mauritius will have to switch from non-African to African sources of textiles.

In the case of Vietnam, further trade liberalisation is being pushed by Vietnam's commitments under the Association of South East Asian Nations Free Trade Agreement (AFTA) - Vietnam joined ASEAN in 1995 - and by Vietnam's application for membership of the World Trade Organisation. Under AFTA, tariffs on imports from ASEAN will drop to 5% by 2006. The QR reductions under AFTA are being offered by Vietnam multilaterally (World Bank Vietnam 2001b: 39). Under the USBTA, cuts of 30-50% are planned on many existing tariffs. WTO membership would require average Vietnamese tariffs on manufactures to be cut to no more than 10% (World Bank Vietnam 2000: 26). South Africa also has some commitments to reduce trade barriers under its agreement with the EU.

Table 1 profiles South Africa and Vietnam in relation to China, the world's largest exporter of textiles and garments, and Table 2 shows the importance of textiles and of garments in South Africa's and Vietnam's exports. Over the period 1990 to 2000 South Africa's (current US dollar) textile exports¹⁵ grew by an annual average of 5.8 per cent. Textile and garment exports in Vietnam, also in terms of current US dollars, grew over the same period at 38 per cent per year, although this was from a low base.¹⁶

Table 1 Profiles of South Africa and Vietnam in comparison to China

	South Africa		Vietnam		China	
	1980-89	1990-99	1980-89	1990-99	1980-89	1990-99
Growth rates (%)						
GDP	1.0	1.9	4.6	8.1	10.1	10.7
Exports of goods and services	1.9	5.3	n/a	27.7	19.3	13.0
Shares (%)	1990	1999	1990	1999	1990	1999
Manufacturing/GDP	24	19	19	(18)	33	24
Exports/GDP	24	25	26	44	18	22
Manufactures/Merchandise Exports	22	54	(14)	(29+)	72	87
GNP per capita at purchasing power parity		\$8,318		\$1,755		\$3,291

Sources and Notes: World Bank (2000) for all statistics except those bracketed, as follows:

-Vietnam 1999 share of manufacturing in GDP, and share of manufactures (textiles and clothing, footwear, and handicrafts) in exports from World Bank Vietnam (2001b)

-Vietnam 1990 share of manufactures in exports from World Bank Vietnam (1998). Note that 1990 was an untypical year, in the sense that Vietnam was losing its major markets in the Soviet bloc.

Table 2 South Africa and Vietnam Textile and Garment Export Shares

Shares (%)	South Africa		Vietnam	
	1990	1999	1990	1999
Textiles and garments in total exports	2.4	2.2	7.9	15.1
Textiles in total textile and garment exports	86.3	67.1	23.5	11.8 (1998 figure)
Textiles in total exports	2.1	1.5	1.9	1.8
Textiles and garments in total manufacturing exports	11	4	56	52 (maximum)

Sources and Notes: South African figures calculated from Trade and Industrial Policy Strategies (TIPS), Johannesburg, website trade data base (www.tips.org.za). Note the export figures used in this table refer to the South African Customs Union, not South Africa alone.¹⁷ Shares in manufacturing exports estimated using shares of manufacturing in exports used in Table 1. Vietnam: 1998 share in total exports from World Bank Vietnam (2001b), 1998 share of textiles in textile and garment exports from Vu *et al* (2001: 32), share of textiles and garments in manufacturing exports estimated using shares in Table 1, and other Vietnam figures from Hill (2000)

State owned enterprises in Vietnamese textiles, accounting for about half of total output, have been important exporters,¹⁸ though usually by exporting their fabrics made into garments rather than exporting fabrics and other textiles directly. These SOEs are by no means the dinosaurs of popular imagination. Although they do receive preferential access to credit, land allocation and MFA

export quotas, they have greatly restructured and compete in international markets without direct cash subsidy.¹⁹

The South African textiles case shows that rapid trade liberalisation can be a driver of exports, but that exports are not necessarily a driver of the growth of firms.²⁰ This is because some of the exporting is distress exporting caused by the loss of the domestic market to imports, both directly and via import penetration in clothing. Nevertheless, even distress exporting needs links to be formed with overseas buyers and requires international standards of quality and delivery to be met, and for some firms it is the basis of improved performance. Improved performance is more likely for firms that compete on quality rather than on price. Export growth in South Africa required a reorientation of exports into more specialised areas, such as industrial textiles, often on strengths built up during the era of import substituting industrialisation.

Trade liberalisation has generated import competition long before trade barriers have been fully removed. Import competition in South Africa and Vietnam is partly the result of illegal importing, but, particularly in the case of Vietnam, strong import competition was reported by firms while effective protection against imports (that is, protection on value-added) apparently remained substantial, both absolutely and relative to other activities.

Nor has successful exporting has required complete trade liberalisation. In both Vietnam and South Africa, the anti-export bias generated by apparently substantial remaining levels of effective protection against imports has not been a barrier to rapid export growth. This also is true of China.

Impacts on Firms and Workers

In Vietnam over the course of the 1990s textile output rose by 75 per cent while textile employment fell by nearly a third. In South Africa intense import competition led to a stagnation of output in the 1990s, and a sharp fall in employment, although textile exports rose. As in Vietnam, job losses were driven in part by investment in less labour-intensive equipment, but in the South African case many firms simply went out of business.

In Vietnam real wages have risen in most textile SOEs for those workers who

remained employed. In South Africa average real wages in textiles rose somewhat during the 1990s, probably as a result of employment losses predominantly among lower waged employees.

The substantial retrenchments that have taken place in Vietnamese textile SOEs were mainly of older workers with poor health and lower educational levels. Only 30 per cent of the retrenched workers in our small sample had been able to find another formal sector job. However, a combination of informal sector earnings, early retirement pensions and retrenchment allowances meant that our retrenched workers' households had on average a monthly per capita income of almost two thirds that of employed textile workers, and about double the 2001 official Vietnamese urban poverty line. Also important in maintaining living standards was income from other family members, including grown up children.

In South Africa the effects of retrenchment have been more severe. Despite some unemployment insurance fund payments to almost all the retrenched workers interviewed, average per capita household income fell to just over 40 per cent of that of employed textile workers. Those in Kwa-Zulu Natal (accounting for three quarters of our retrenched interviewees) had incomes only a quarter of those of people in employed textile households, and were below the poverty line. Workers recorded difficulties in meeting their most basic needs such as food, housing and medicine. A crucial factor in these problems is the astonishingly high existing level of open unemployment in South Africa and the difficulties faced by retrenched workers in finding income earning opportunities even in the informal sector.

Conclusions

This paper has set out the results of research investigating the impact of globalisation, particularly trade liberalisation, on poverty. Using the textile industries of South Africa and Vietnam as case studies, it has outlined the effects on firms, employment and workers' livelihoods.

This research shows that the impact of the restructuring of textile firms in order to compete internationally has fallen on employment rather than wages. Employment has fallen sharply while wages have risen (Vietnam) or remained

more or less constant (South Africa). The use of new labour-saving technologies has been a driver of these job losses, though in South Africa it is also the result of firms going out of business in the face of import competition - both direct and via the demand for garments - and of depressed domestic demand. This evidence suggests that making a textile industry internationally competitive almost inevitably involves job losses, although an efficient textile industry has the potential to support job creation in export garments.

While South Africa's exports of textiles are larger than its exports of garments, it also has been able to access the US market via indirect sales to the export garment sector, utilising the AGOA trade agreement. Vietnam has been able rapidly to expand its exports of garments, and garment exporting has been the main channel through which Vietnamese textile SOEs have entered the international textile and garments value chain. Vietnam has successfully expanded its exports to the Japanese market without trade preferences, but its sales to the US under the USBTA will be helped by the fact that China, its strongest competitor, has its exports to the US (and the EU) restricted under the MultiFibre Arrangement. When the MFA is phased out in 2005, China will become a much more formidable competitor both in the US and the EU, although some restrictions on China will remain in place at least until 2008 under a Sino-US bilateral agreement. The temporary nature of the two countries' trade preferences underline the importance of becoming fully competitive, and the research outlined here indicates the effects of seeking that competitiveness. Trade preferences give a short term breathing space for textile and garment exporters to upgrade to the increasingly stringent price, quality and delivery requirements of buyers in the international textiles and garments value chain (Nadvi and Thoburn 2004).

The impacts of job losses on workers' households have been more severe in South Africa than Vietnam, in part because of South Africa's high level of unemployment, which makes even informal sector jobs hard to find. In Vietnam, retrenchments have been cushioned by the job opportunities offered to workers and their family members by a rapidly expanding economy.

While textile employment has contracted in both countries, garment employment has expanded, though in the South African garments sector this has coincided

with increased informalisation and downward pressure on wages. In Vietnam, increasing garment employment has given job to many young workers, including women from low income provinces, and thus has some positive poverty impacts. However, the educational requirements of state-owned textile companies in Vietnam are likely to preclude the direct employment of the urban or rural poor if the textile industry increases employment as part of the country's ambitious plans for growth in textile and garment exports.

Notes

- ¹ For details of the globalisation, production and poverty project, see www.gapresearch.org/production/globprodpov.html. The project is part of the DfID globalisation and poverty research programme (see www.gapresearch.org).
- ² For an overview of DfID-financed research on globalisation and poverty in Vietnam, see Thoburn and Jones (2002).
- ³ In this paper the term 'textiles' is used in the narrow sense. That is, to exclude clothing.
- ⁴ The project studied textiles in South Africa and in Vietnam. Garments were studied in Vietnam and Bangladesh (by Khalid Nadvi of the Institute of Development Studies at Sussex University). Also, a small study was included of China in the international textiles and garments economy.
- ⁵ See in particular Roberts and Thoburn (2004) for a discussion of price changes in the South African case. Of course, quality and delivery considerations as well as price are very important in import competition and export competitiveness in textiles and garments.
- ⁶ The impact on workers's livelihood has been investigated through interviews with the households of textile workers, former textile workers and other workers in the locations from where textile workers are drawn. This part of the research is reported in Nguyen, Sutherland and Thoburn (2002) for Vietnam, and a preliminary account of South Africa is given in Bezuidenhout *et al* (2002).
- ⁷ The Gini coefficient for South Africa was 0.593 (in 1993-4). The Gini measures inequality, with a value of 0 indicating complete equality (all households have equal income), and a figure of 1 indicating complete inequality (one household having all the income). For comparison, the Gini coefficient for the UK in 1995 was 0.37, and for Japan in 1993 was 0.25. The years are the latest available (World Bank 2002b: 75-7).
- ⁸ Unemployment in February 2002 was 30 per cent of the labour force, according to the Statistics South Africa Labour Force Survey. This figure is the official (narrow) definition where the person must have actively undertaken job-seeking activity in the previous four weeks. On the expanded definition (where the person wants to work, even if they have been discouraged from active search) the unemployment rate was 41 per cent.
- ⁹ In 1999 world textile exports were \$147.9 billion compared to garment exports of \$186.0 billion (WTO 2001).

- ¹⁰ For discussion of estimates of effective rates of protection see Roberts and Thoburn (2004) for South Africa, and Thoburn (forthcoming) for Vietnam.
- ¹¹ Import penetration ratio $M/(P-X+M)$, with M as imports, P production and X exports. P-X+M is apparent consumption.
- ¹² In both these calculations, textile production and trade is redefined so as to exclude production and trade in raw and minimally processed wool.
- ¹³ 2002 tariff rates from Athukorala (2002).
- ¹⁴ Similar provisions apply to South African access to the EU market under the EU trade agreement, except that into the EU only the fabric needs to be from South Africa (or an EU country), not the yarn.
- ¹⁵ As noted earlier, textile exports are defined here so as to exclude minimally processed wool.
- ¹⁶ Textile and garments are included together as this is the form in which statistics for the whole period are available. Using the data in Hill (2000:285), textile exports grew at 35 per cent annually from 1990 to 1996 and garments at 43 per cent.
- ¹⁷ However, the discussion in the text of export growth rates and import penetration uses South Africa-only trade statistics recently made available on the TIPS website.
- ¹⁸ Vu *et al* (2001: 14) suggest that Vinatex, the state organisation controlling Vietnam's textile and garment SOEs, accounts for 40 per cent of the country's total garment and textile exports.
- ¹⁹ See also Perkins (2001) for a discussion of the reform of Vietnam's state enterprises.
- ²⁰ These conclusions are based on a postal survey of South African textile firms reported in Roberts and Thoburn (2003) and follow up interviews reported in Roberts and Thoburn (2004).

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