

Ensuring economic diversification works for women – Taking a closer look

Introduction

The creation of decent work opportunitiesⁱ for all is widely recognised as a key strategy for helping to alleviate poverty, tackle inequality, and promote sustainable and inclusive growth. Diversifying and technologically upgrading developing countries' economies are seen as key enablers of this ambition. Relatedly, achieving gender equality, including by addressing discriminatory social norms and recognising, reducing and redistributing women's disproportionate unpaid care work, is critical for ensuring women can access decent work and enjoy their full range of human rights. These issues are brought together under the new Sustainable Development Goals (SDGs)ⁱⁱ, which also reflect existing, binding human and labour rights commitments.

Yet prevailing realities often appear to conflict with this agenda. Discriminatory social norms based on gender as well as, for instance, class, caste, race, age, and migrant, marital and reproductive status, are reproduced in labour markets and the workplace, and serve to drive down women's pay and working conditions. Low-wage low-skill export manufacturing – increasingly an economic development strategy favoured by poor countries – often exemplifies this pattern. Here, women are segregated into the lowest paid roles, assembling parts or ready cut pieces in often informal, unregulated workplaces, where there is little respect for human rights.

Meanwhile, global trade rules that compel developing countries to compete on low wages in the assembly of low quality goods are also arguably limiting their potential to diversify their economies. Thus, many countries are locked into production of a limited range of largely low value-added goods, for which they rely on women's cheap, flexible and plentiful labour to maintain a competitive advantage in a global marketplace characterised by volatile capital flows.

To explore further the relationship between gender equality, diversification, and trade this paper sheds light on the new research by ActionAid, which found that countries with higher levels of gender equality are associated with greater export diversity and quality – a difference of up to 72% on average for export diversity and 42% on average for export quality.ⁱⁱⁱ Yet historical experience tells us that as manufacturing becomes more technology and capital intensive, female employment in manufacturing tends to decline.^{iv} Rather than being incompatible, we contend that these two findings point out to the need for any efforts on economic diversification to be accompanied by tangible policies to tackle discrimination in the labour market to ensure gender equality and women's economic rights.

Moreover, these findings raise a number of interesting questions about the relationship between gender equality, economic diversification and patterns of discrimination and occupational segregation. This paper begins to explore these relationships by looking in more depth into two Asian countries: Vietnam and Bangladesh. Both rely heavily on export manufacturing and have large female workforces for the production of garments and textiles. However, while Bangladesh relies almost exclusively on the garment sector, Vietnam has much more diverse economy and a growing manufacturing sector, including in automobiles, electronics and machinery. However, occupational segregation prevails, the greater diversification observed in Vietnam is arguably at risk from pending free trade agreements.

In developing countries, economic diversification and production of quality exports has the potential to play a big role in creating decent work opportunities for women. However, as long as export-led models of growth drive and rely on gender inequalities, women's human rights – as well as the potential for stronger and more inclusive economic growth - will remain unrealised.

Woman in export manufacturing

Many developing countries increasingly implement export-led growth strategies. These have been typically accompanied by deregulation, liberalisation and privatisation of their economies, and proliferation of Export Processing Zones (EPZs) or Special Economic Zones (SEZs) since the 1970s.^v Historically, the manufacture of certain export-oriented goods, such as garments and electronics, both inside and outside EPZs or SEZs has been predominantly carried out by women. This increasing share of women in certain export manufacturing sectors has been described as the *feminisation* of the labour market.^{vi} This is a double-edged sword for women: the emergence of these sectors provides them with the opportunity of paid employment and greater economic autonomy; on the other hand, the labour market for women in these sectors remains precarious and exploitative.

The last two decades have seen an overall increase in the share of women in industry in a number of global regions. These include East Asia, Southeast Asia and the Pacific, South Asia, the Middle East, and Sub-Saharan Africa.^{vii} According to the latest available country data compiled by the ILO, women now represent 40% or more of total manufacturing employment in 35 out of 127 countries. This significant level of representation overall does not capture some countries where women comprise up to 80-90% of the workforce in certain sectors, such as export garment manufacturing in Bangladesh and Cambodia.^{viii}

FIGURE 1 Changes in sectoral shares in employment for women and men, 1995-2015



Source: Naoko Otobe, ILO, 2015¹⁹

Notes: Author's calculation using data from ILO's 2014 global employment trends projection.

Note 2015 based on ILO 2014 global employment trends datas.

These figures demonstrate that export-oriented growth has undoubtedly increased employment opportunities for women in developing countries, including many from poor communities.^{ix} However, with limited alternative opportunities, as elaborated below, these women tend to be segregated into labour intensive, low technology and low value-added jobs.^x

Moreover, as women there tend to be employed in low paid, low skilled and insecure jobs, with few labour rights to protect them – including to engage in collective bargaining^{xi} – they are particularly

vulnerable to economic crises and their aftermath.^{xii} The East Asian economic crisis of 1997 and the 2008 global financial crash caused dramatic levels of job losses for women working in export sectors, as demand for the goods produced predominantly by women fell sharply.^{xiii}

Crowded out by development strategies

At the same time, reliance on low wage export manufacturing based on “women’s comparative disadvantage”^{xiv} means countries effectively de-skill their labour force and constrain the potential to compete on quality across a range of sectors. It is damaging for both, developing countries’ economies and for women workers, as it leaves them vulnerable to job losses when countries shift its manufacturing up the value chain.

And indeed feminist economists have found that, while industrial policy that “diversifies export products, moves towards higher quality exports and builds backward linkages...serves as a strategy for better labour standards”,^{xv} women may not benefit equally. In fact, discriminatory gender biases in the labour market mean that technology, skill and quality upgrades associated with diversification often cause women to be excluded from job opportunities that are created.^{xvi} Shifts towards higher-skilled manufacturing have also been shown to cause low skilled, low paid jobs – and the women who undertake them – to be relocated into the informal economy.^{xvii}

So while export manufacturing has created notable employment for women over the last 30 years, the pursuit of higher technology, higher value-added, capital intensive manufacturing is – if it successfully emerges in the first place - marks a decline in such opportunities. Recent studies found such a *defeminisation* of the manufacturing workforce to be occurring in 21 of the 36 countries assessed,^{xviii} including in East Asia and the Pacific.^{xix}

Deregulation and gender discrimination driving down woman’s pay and working conditions

The twin troubles associated with export manufacturing for women - exploitation of their labour, and/or *defeminisation* of workforces in more capital and skill intensive industries – do not happen in a vacuum. They are a result borne of years of market liberalisation reforms intertwined with discriminatory social norms, driving down woman’s wages and working conditions, while also constraining developing countries’ potential to diversify and strengthen their economies.

In the dominant global economic model, trade rules and loan conditionalities requiring liberalisation and deregulation have served to limit opportunities for developing countries to move up the value chain towards more high skilled, diversified and profitable manufacturing.^{xx} Domestic firms or fledgling industries have often been ‘crowded out’ or unable to compete with foreign investors, while international trade rules prevented developing country governments from offering companies emerging on the domestic market specific support, such as for example protection from cheaper imports.^{xxi} The low-value export production which ensued, and so widely dominated by women, is thus subjected to intense international competition. Therefore, and in order to maintain profits, brands progressively squeeze suppliers to produce more for less, while developing countries are forced to compete over wages, along with tax breaks and other benefits to entice foreign investors and circumvent capital flight.^{xxii}

Many feminist activists and scholars have drawn attention to the ways in which this global market’s need for cheap labour took advantage of unequal gender relations to keep workers’ wages and working conditions poor.^{xxiii} For example, the disproportionate number of women employed in the garment sector is widely – if falsely – attributed to their ‘innate’, rather than acquired, sewing skills.

In the same vein, the low pay for this work is justified by essentialist notions of woman as 'second earners', their 'natural dexterity' or 'nimble fingers'.^{xxiv}

What is more, women workers are also reportedly preferred by some employers because they are widely stereotyped as more submissive, less disruptive, and less likely to engage in union activities.^{xxv} Such stereotyping varies across contexts and is often conflated with discriminatory biases based on other aspects of women workers' identities, such as their race, age, class, caste, and migrant and reproductive status. Relatedly, some employers do perceive that woman workers will be less likely to resist increasing trend towards so called 'flexibilisation' – i.e. hiring on short-term contracts, if contracts are provided at all^{xxvi} – which threatens workers' enjoyment of whole spectrum of labour rights including right to redress, collective bargaining, and access to vital social protection.

Other rights violations experienced by woman include violence at, and on the way, to work, which translates to, among other things, entrenched occupational segregation and reinforced patriarchal hierarchies. According to the International Trade Union Confederation, up to half of women experience unwanted sexual advances and physical contact, or other forms of sexual harassment, whilst at work.^{xxvii}

And not least, women's disproportionate responsibility for providing unpaid care within their households and communities also contributes to their low status and vulnerability in the labour market. On one hand, time spend caring greatly limits women's time and opportunities to pursue employment opportunities, but on the other - many women who become pregnant, face non-renewal of their contracts and replacement with a new cohort of younger women, which some employers consider to be more 'unencumbered'^{xxviii} or 'productive'.^{xxix} A recent study found that, in India less than 1% of women receive paid maternity leave.^{xxx}

It is perhaps unsurprising, then, that research by ActionAid valued the gender pay gap in developing countries at US\$2 trillion annually, starkly demonstrating the scale of women's exploitation in the labour market.^{xxxi}

Gender equality and export manufacture: exploring the relationship further

In order to explore the relationship between gender inequality and export diversification in developing countries further, ActionAid has assessed the extent to which gender discrimination – as measured by the OECD Social Institutions Gender Index (SIGI) - is associated with export quality and diversity - as measured using IMF data, for the 108 countries featured in the SIGI.^{xxxii} The SIGI assesses discrimination in relation to a range of social institutions, specifically family codes, physical integrity, son bias, access to resources and assets, and civil liberties.^{xxxiii} Total Export Quality is a measure of the average quality of products exported by a country, as indicated by worldwide price comparisons. Export Diversification is a measure of how the products exported by a country have become increasingly diversified since the 1960s.^{xxxiv}

This analysis shows that gender inequality is negatively associated with both export quality and diversity, even when controlling for GDP per capita and the importance of manufacturing exports (i.e. trade) to the economy. **In other words, export diversification and quality is higher in countries which are more gender equal.** As Figures 2 and 3 show, higher levels of gender discrimination (along the X axis) are associated with lower quality and less diverse export bases (on the Y axis). To be more concrete, the 25% most gender equal countries out of the 108 we analysed have an export base that is, on average, 72% more diverse, and an export quality that is, on average, 47% higher, than countries in the bottom 25% for gender equality.

What could explain this result and how does it relate to the evidence that shows *defeminisation* of the manufacturing workforce when countries manage to diversify and move up the value chain?

Rather than being seen as incompatible, these findings indicate both the need for greater policy space for developing countries to build strong diversified domestic economies,⁷⁸ and for any economic diversification strategies to be accompanied by strong policies to tackle gender discrimination in the labour market and wider society.^{xxxv}

FIGURE 2

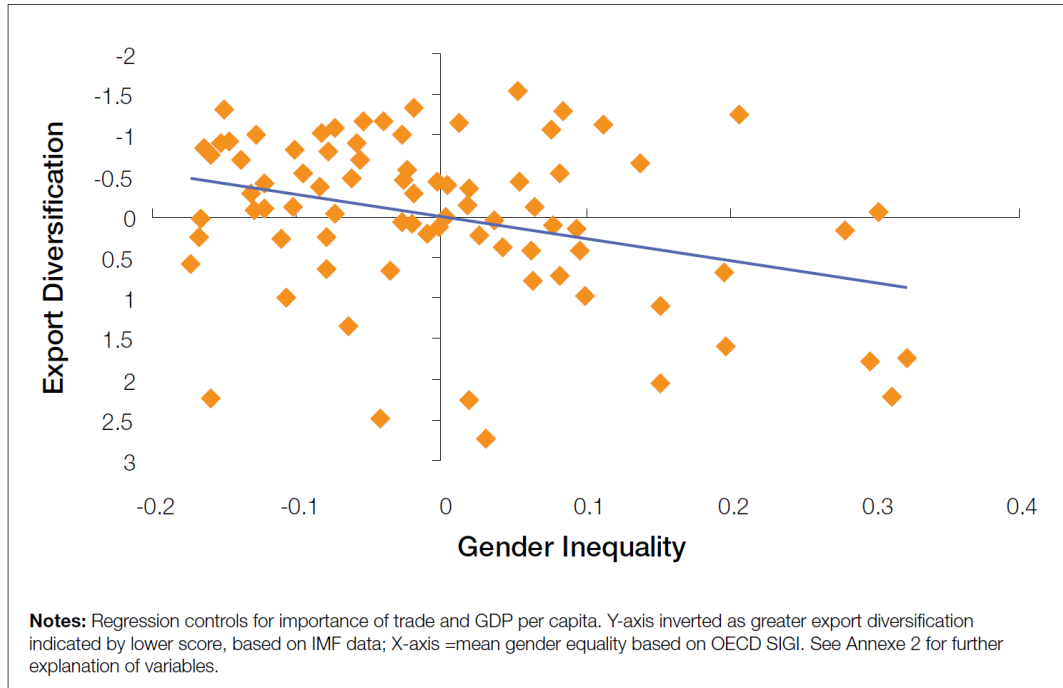
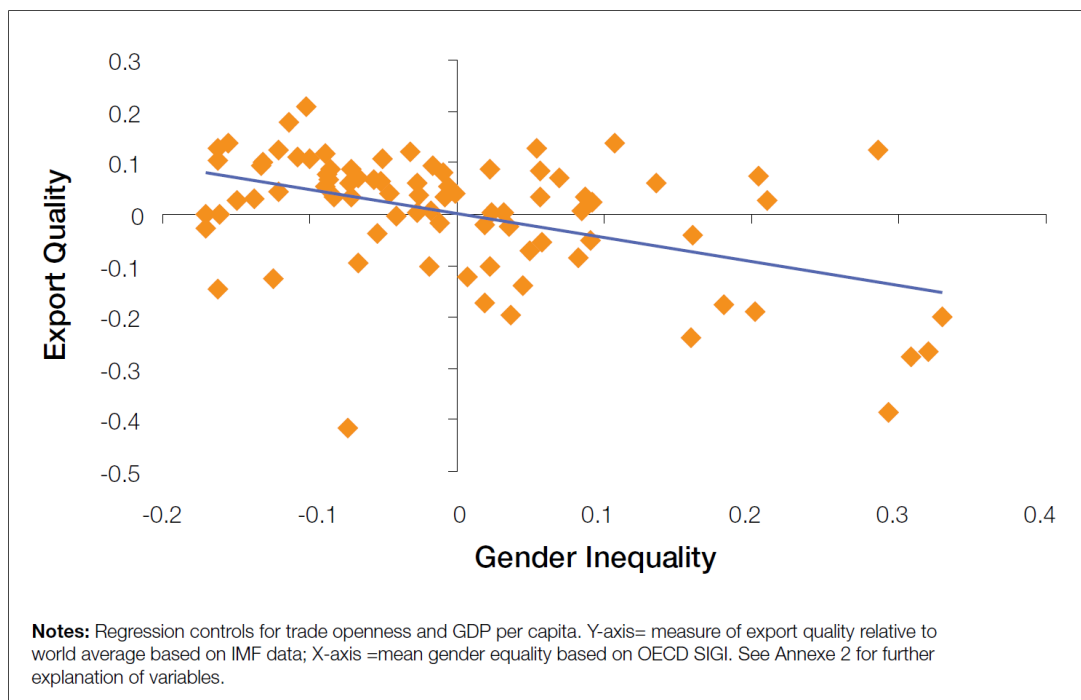


FIGURE 3



However, it is important to note that, while this analysis shows a statistically and quantitatively significant relationship between gender equality and export quality and diversity, it does not support a causal relationship in either direction. Further research is needed to explore how gender

inequalities in the labour market (and perhaps in wider society) impact on countries' potential to diversify and increase the quality of their exports – as well as to create decent jobs for women – and the reasons behind this.

The next section of this paper will begin to explore some of these dynamics and focus on industrial development, gender equality and women's rights in the labour market in 2 Asian countries: Bangladesh and Vietnam. It will illustrate our core analysis: that unless women's rights are at the centre of developing countries' economic reforms, women will derive limited benefit from export-led growth, even as their cheap labour provides it with a hidden subsidy. And this lesson will apply even in cases of successful diversification.

Stopping short of transformation: Bangladesh

Largely an agricultural economy in the 1970s, over the last three decades Bangladesh embarked on a programme of trade and economic liberalisation, accompanied by an industrial strategy designed to make the most of Bangladesh's plentiful supply of cheap labour. The principal result is the development of a thriving garment industry. By 2013-14 Bangladesh exported garments worth more than US\$24 billion, employing 4 million workers.^{xxxvi} Garments account for 84% of the country's export earnings^{xxxvii} and contribute more than 10% of GDP.^{xxxviii} At first glance, the country appears to be on the path to economic transformation. It has moved from low-productivity activities in agriculture towards higher productivity manufacturing; in theory offering up greater opportunity for its citizens to move from subsistence living to decent paid employment. But this promise has only partially been realised. In practice Bangladesh's transformation is stuck, relying on its comparative advantage of cheap labour and failing to invest in emerging industries. The result is a formal economy dominated by a garment industry that provides mainly low paying, precarious and hazardous jobs. Meanwhile the vast majority of the population are still reliant on the informal sector and agriculture. Bangladesh urgently needs to diversify its economy into sectors that add more value, which can generate decent jobs for women and men, instead of relying on poor women's cheap and unpaid labour to subsidise its growth.

Industrial and social development in Bangladesh

In the 1970s Bangladesh was largely an agricultural economy with a very limited range of products and services to trade on the global markets – jute and agricultural products mainly.^{xxxix} Yet in the early 1980s the government adopted a New Industrial Policy heralding a shift to export-oriented industrialisation.^{xl} Since then and in the early 1990s Bangladesh has witnessed accelerated economic growth, and as from 2004 its annual GDP always grew over 6%.^{xli}

The government has taken liberalisation very seriously. Bangladesh became a member of the WTO in 1995 and between then and 2013 has signed more than 30 investment agreements – both bilateral and multilateral.^{xlii} Measured in terms of simultaneous rise in export and import, its openness has increased from 22.3% in 1990 to 50.5% in 2011,^{xliii} though export diversity and quality has been rather low or average, and diversification even slightly decreased, over the last decade.^{xliv}

Bangladesh imports a large range of goods, including food, fuel and capital machinery,^{xlv} while export earnings are predominantly from garments (84%), with much smaller proportion coming from other products.^{xlvi}

On social development, the country has been praised as being one of the developing world's biggest MDG success stories. It has reversed some of the worst social development indicators and has seen its poverty rates falling from 48.9% in 2000 to 31.5% in 2010.^{xlvii} However income inequality in

Bangladesh has worsened, as indicated by a rise in the Gini coefficient from 0.39 in 1991-92 to 0.46 in 2010.^{xlviii}

Concerning gender equality and women's rights, progress in some areas has been remarkable. Between 2001 and 2010 Bangladesh managed to reduce maternal mortality by 40%, girls outnumbered boys in school, and women's labour force participation got a significant boost.^{xlix} Nevertheless, in the UNDP Gender Inequality Index, Bangladesh continues to hover among the hundred's second tens,^l and in 2014 OCED SIGI Index scored levels of gender inequality in the country as 'very high'.^{li}

The rise of a garment empire

Garments production is seen as an industry that creates jobs, especially for women. But as feminist economists have argued, rather than challenging women's subordination in the society the industry is actually reproducing patriarchal relations in order to maximise profit.^{lii} In this way, women's cheap labour can be seen as a subsidy to Bangladesh's overall growth.

The garment industry boomed in the early 1980s^{liii} and today Bangladesh is the world's second largest exporter of garments after China.^{liiv} Figures collected by Human Rights Watch show that "the growth of the industry has been dramatic. In the 1983-4 fiscal year, Bangladesh exported garments worth just over US\$31.5 million, and employed 120,000 workers in 384 factories. By 2013-14 it exported garments worth more than US\$24 billion, and employed some 4 million workers in 4,536 factories."^{liv}

The majority of these, approximately two thirds or more, are women, contributing to a growth in women's labour force participation.^{livi} Between 1996 and 2000 it grew from 16% to 24%, and then further to 34% in 2013, though access to microfinance and drop in fertility rates have been arguably equally if not more important in encouraging women to take up jobs.^{liii} This growing female labour force participation – though still very low by international standards - has been associated with Bangladesh accelerated GDP between 1990 and 2010, to large extent driven, as already said, by export manufacturing production of clothes.^{liiii}

Diversification and gender equality stunted

Impressive as these numbers are, they do not tell the entire story. Bangladesh is stuck in a low value-added segment of the global value chain and equally stuck are the woman workers.

Even mainstream economic institutions such as Asian Development Bank agree that Bangladesh's approach to exports is reaching the end of its useful life.^{lix} The garment industry, i.e. domestic firms selling directly to international buyers, rather than subsidiaries of multinational firms,^{lx} has limited potential to boost the economy any further. Firstly, they generate only little profits. Further, they rely on the comparative advantage of the cheap cost of labour and tax incentives not made available to other industries. If either of these conditions are not met, or industry is hit by global recession, Bangladesh's economy would not be diversified enough to compensate the loss of its export.^{lxi}

Meanwhile low wages, and even poorer working conditions, characterise the industry, which prefers to hire women for their socially-ascribed gender roles determining that they have the nimble fingers and docile attitudes required by their employers. It is no secret that majority of workers in Bangladesh garments are young women before the age of 30.^{lxii} Their jobs involve long hours on the factory floor, risk of violence or sexual harassment and, even if minimum wages in Bangladesh have increased over time, they still do not pay a living wage.^{lxiii} In fact, monthly wages for garment workers in Bangladesh have been the lowest in the whole industry worldwide – US\$10 lower than in

Vietnam, one of Bangladesh's biggest competitors.^{lxiv} And still, woman's average salary was only 54% of male salary in 2010.^{lxv}

Moreover, according to the Survey of Manufacturing Industries 2012, only 11% of managers and administrators were woman, and in many factories all line managers were man.^{lxvi} Those women brave enough to stand up for their rights have often been blacklisted and struggled to find another job.

Beyond garments: where do Bangladeshi women work?

Beyond garments job opportunities for woman are scarce, as formal female employment has been built upon this single industry. Other industries have been growing either too slowly or have not been employing woman in large numbers.^{lxvii}

Outside garment manufacturing, agriculture is the only area with substantial numbers of woman workers. Overall female labour force in agriculture has actually gone through a sharp increase, from 28% in 1996 to 65% in 2010, very much due to the rapid extension of microcredit programmes.^{lxviii} Over 90% of the microcredit clients are women^{lxix}, and while these programmes have made a significant contribution to boosting women's economic participation, profit margins have been very low and often on the margin of subsistence. This is reflected in the agriculture declining share in country's GDP, from 17% in 1980–1989 to 11% in 2010–2015, and despite the fact that this is the sector employing almost half of the country.^{lxx}

The designation of certain kinds of labour as either for women or men, still exists strongly in Bangladesh, in garment industry and beyond. While both man and women are in informal and vulnerable employment, and in large numbers, there are nearly 10 times more women than man working as 'contributing family workers', and man dominate in 'own-account workers' category, which is considered less vulnerable.^{lxxi}

Moreover, educated young women face striking unemployment rates, much higher than an with similar education. The 2012 School-to-Work Transition Study found extremely high rates of unemployment for women with secondary education (21.6%) and for those with tertiary education (31.5%), as opposed to respectively 8.3% and 22.5% for men with the same qualifications.^{lxxii}

Diversify and Conquer

To lift the country out of poverty, and boost gender equality, government will need to create the conditions for the emergence of higher value-added industries, in which upgraded skills and new technologies can be utilized and decent jobs for women and men can be generated. Ideally this should be nested within a larger strategy to ensure the delivery of quality public services and other public goods. Learning from economic history suggests that this can only be done through strategic economic diversification and investment in emerging high value manufacturing such as, for example, electronics or pharmaceuticals, and with explicit political economy objective to promote gender equality, women's employment and economic rights.

As for now, industries other than garments are too weak to provide significant numbers of jobs, even though job creation in the garment industry barely addresses Bangladesh unemployment. Meanwhile woman, and man, are stuck producing cheap clothes, or in low value agriculture, or in informal vulnerable jobs, comprising huge potential labour force for the new industries to tap into.

Bangladesh *Seventh Five-Year-Plan* is expected to guide country development priorities in the 2016-2020 period.^{lxxiii} It gives priority to ways of enhancing so-called job creating GDP, including through increasing share of employment in manufacturing, from today's 15% to 20% by 2020, and by 'substantial improvement of exports'.^{lxxiv} It also gives due attention to gender equality and social inclusion, however an explicit commitment about increasing women's labour force participation and enjoyment of women's economic rights have not been included.^{lxxv}

Bangladesh aspires to become a middle-income country by 2020. Realising this ambition may well rest on its ability to implement industrial policies proven to be successful in places like Taiwan and South Korea, such as protection of infant industries or imposition of local content requirements on foreign investors.^{lxxvi} However, this might be politically and financially challenging, not least because it would require resisting some of the constraints embedded in free trade agreements the country has signed into. But inspiring stories from which to learn can be found in other countries of Asia, including Vietnam.

And if Bangladesh wants to continue its trajectory of improving gender equality indicators across the board, special attention must be paid to not reproduce gender inequalities seen in industrialisation processes in Bangladesh to date.

Table 1. Overview of some key industrial, gender equality and employment indicators for Bangladesh

Total Export Quality	Total export equality in 2010 was 0,76 - slight increase from 2000 (0,71) and 121 value out of 178 countries for which data is available. Source: https://www.imf.org/external/np/res/dfidimf/diversification.htm
Total Export diversification	Export diversification has slightly decreased from 4,53 in 2000 to 4,81 in 2010 (higher value means less diversity) and is 160 for 187 countries with data. Garments account for 84% of the country's export earnings. Source: https://www.imf.org/external/np/res/dfidimf/diversification.htm
Exports of goods services as a % of GDP	In 2015 export share in Bangladesh GDP accounted for 17,3%, almost double increase from 2000 (10%), yet decrease from previous years. Source: http://data.worldbank.org/indicator/NE.EXP.GNFS.ZS?view=chart
OECD Social Institutions and Gender Index (SIGI)	Bangladesh SIGI variable was assessed at 0,39 or as 'very high' levels of inequality. More specifically, inequality in access to resources and assets was assessed as 'high', while discriminatory family code and son bias were assessed as 'very high'. Source: http://www.genderindex.org/country/bangladesh
UNDP Gender Inequality Index (GII)	The GII measures gender inequalities in 3 aspects: reproductive health, empowerment and economic status. In 2014 Bangladesh GII was 0,50 - slight improvement from 2005 (0,58), and 111 out of 188 countries with data. Source: http://hdr.undp.org/en/composite/GII
Violence against Woman	The results of Violence Against Woman Survey (2011) by Bangladesh Bureau of Statistics and UNFPA identified that as many as 87% of married women have ever experienced any type of violence by their husband and 77% reported violence experienced during the past 12 months from the survey time. Among different types of violence psychological was the most common, and about half of ever married woman has experienced economic violence. Source: http://203.112.218.66/WebTestApplication/userfiles/Image/Latest%20Statistics%20Release/VAW_Survey_2011.pdf
Time spend on unpaid care / household work	The time use pilot survey conducted by the Bangladesh Bureau of Statistics (2012) showed the average number of hours spent by woman is 4.8 hours compared to 1.3 hours spent by men on "providing unpaid domestic services

	<p>for own final use within the household” and 0.7 hours and 0.1 hours respectively for “providing caregiving services to household members”. Employed female population were found to spend less time on unpaid domestic services (2.8 hours) but the same amount of time for caregiving.</p> <p>Source: http://interactions.eldis.org/sites/interactions.eldis.org/files/BDI-Research-Report-4-Unpaid-Care-Work-Literature-Review-Bangladesh.pdf</p>
Labour force participation	<p>Statistics Labour Force Survey (2013) estimated women’s labour force participation at 34% - much below international standards, though substantial increase from 2000 (24%) - while men’s at 82%. However, there has been substantial issues with methodology applied regarding what actually counts as ‘work’.</p> <p>Source and more information: https://www.adb.org/sites/default/files/publication/190589/ban-beyond-garments-eds.pdf</p>
Employment by sector	<p>According to ILO indicators, in 2010 (latest available data) 65% of woman were employed in agriculture (compared to men 40%), 22% were in services (men 41%) and 13% were in industry (men 20%). Garment is the only industry where woman dominate (according to various sources from two thirds to even 90%).</p> <p>Source: http://www.ilo.org/global/statistics-and-databases/WCMS_424979/lang--en/index.htm</p>
Vulnerable employment	<p>While ratio of men and women in vulnerable employment is similar (62.6% females and 57,5% males), there are 10 times more women working as ‘contributing family workers’ (50,2% compared to 4,9% males), and there are more men than women in ‘own-account workers’ category (52,6% males and 12,4% females).</p> <p>Source: https://www.adb.org/sites/default/files/publication/190589/ban-beyond-garments-eds.pdf</p>
Gender wage gap	<p>There are different estimations of gender wage gap in Bangladesh yet all emphasize that woman earn far less than man for similar work. The Global Gender Gap Report (2016) by the World Economic Forum found female to male ratio on wage equality for similar work to be at 0,64%, and scored Bangladesh as 122 out of 144 countries surveyed on wage gap.</p> <p>Source: http://reports.weforum.org/global-gender-gap-report-2016/economies/#economy=BGD</p>

Vietnam’s economic diversification: one step forward two steps back

Over the last three decades Vietnam has undergone a thorough socio-economic transformation, rising to the position of middle-income country, regional manufacturing hub, and one of the most attractive places for foreign investors. Having lowered its poverty rates dramatically,^{lxxvii} and with export quality and diversification growing,^{lxxviii} Vietnam has made a considerable progress on the area of gender equality by closing gender gaps in education, maternal health, and access to economic opportunities.^{lxxix} Yet despite impressive women’s labour force participation, and with export manufacturing diversified and booming, woman continue to find themselves at the bottom of the economic pile and experience various forms of discrimination. Unless these gender injustices are explicitly addressed, and put at heart of politics shaping the economy, gender equality in Vietnam might actually get worse, even as the country continues to develop rapidly and is about to enter into the new phase of trade liberalisation.

Vietnam’s gradual route to growth and trade liberalisation

If there is one lesson to be learned from Vietnam’s successful route to growth, it is that contrary to mainstream economic thinking, export development does not depend on full trade liberalisation.^{lxxx}

Since the mid-1980’s and introduction of the so-called ‘*doi moi*’ (renovation) economic reform programme, Vietnam has gradually moved on from central planning to market based economy and export orientation. Yet unlike many countries, for long time it preserved a strong structure of state

institutions and protection against imports.^{lxxxix} Such an approach, and its slow pace of transition especially, has incurred a strong critique from the International Finance Institutions.^{lxxxii} However, it bore fruit eventually with Vietnam accession to WTO in 2007, and being rated among world's top 10 most attractive places for foreign investors.^{lxxxiii}

What's special about Vietnam is the sheer range of its exports. In contrast to other low income countries in Asia, such as for example Bangladesh, with export pattern much more concentrated and vulnerable, Vietnamese export include textiles, garments and footwear, but also coffee, automobiles, machinery and electronics to name but a few.^{lxxxiv} In 2015 export of goods and services accounted for nearly 90% of Vietnam's GDP.^{lxxxv}

However, and despite its trade surplus and successful diversification, Vietnam has not managed to escape a number of challenges, including being confined to labour-intensive production with limited scope for local value adding.^{lxxxvi} Second, as in many other economies in transition, foreign owned companies have been much more successful at integrating into the global market than domestic enterprises, all the while enjoying extremely competitive financial incentives including tax breaks. Third, dependency on foreign capital and technology has risen, as has the vulnerability to exogenous shocks. Fourth, in a competitive international environment, depending on cheap labour for export manufacturing creates downward pressure on workers' wages, rights and skills.^{lxxxvii} And just like in Bangladesh, the majority of those toiling long hours at the factory floor, driving Vietnam's export oriented growth, have been women.

Gender dynamics in Vietnam

Understanding gender relations in Vietnam requires appreciation of the fact that economics have been changing much faster than deeply entrenched patriarchal social norms.^{lxxxviii} Indeed, the country's economic success is yet to spillover to women, adding further weight to this paper's main argument: need for robust policies to address gender inequality to accompany all efforts on economic diversification.

The '*doi moi*' was not gender neutral and led to, among other things, massive lay offs in state owned enterprises and privatisation of public services such as health and education.^{lxxxix} However, many of its elements have nevertheless been quite positive for gender relations. Market economy reforms have created unprecedented job opportunities for woman, especially in the new foreign owned companies and non-state sectors.^{xc} Woman's labour force participation is now at 73%, compared to 82.5% for men, and is one of the highest in the region.^{xcii}

UNDP Gender Inequality Index ratings for Vietnam have also shown improvement, from the low middle-rank group in 1999 to the upper middle-rank group in 2008.^{xciii} And OECD SIGI scored Vietnam's levels of gender discrimination in 2014 as 'medium', far ahead of Bangladesh, though behind other manufacturing hubs like Thailand or Cambodia in the East Asia region.^{xciii} However, feminist scholars have argued that government's capacity to promulgate equality has declined in the new economic system,^{xciv} as lack of regulation over practices by increasingly important foreign investors reinforce men's existing privilege and economic domination.

Nevertheless, an ambitious institutional context for advancement of women's rights now exists. The Law on Gender Equality (2012), on Prevention and Control of Domestic Violence (2012) and National Strategy on Gender Equality (2011-2020) prohibit discrimination against woman in various spheres of life, even though these commitments are yet to be implemented fully.^{xcv} Such implementation is much-needed: three in five women in Vietnam will experience some form of violence in their lifetime^{xcvi} and in the economic sphere, men's prevailing primary role as a breadwinner has been

reflected, in the fact that women continue to do major bulk of unpaid care work— on average 1.5 times more housework per week^{xcvii} – with serious consequences for their chances to take up better paid and decent jobs.

Vietnamese women at work

As in Bangladesh, woman in Vietnam account for the majority of those employed (66%) in foreign invested enterprises,^{xcviii} and dominate labour intensive sectors such as garment, textiles, electronics and footwear, where they tend to work longer hours, in poor health and safety conditions, and more often than man without a contract,^{xcix} support or protection from trade unions, or access to training and promotions.^c Other than manufacturing, women work in agriculture, domestic work, hotels, restaurants, health, and education, while men cluster in better paid construction, utilities, transport, business, and financial services.^{ci} Women migrants, who dominate migration flow from villages to urban areas and industrial zones, are the most marginalised: they are most likely to be the ones lowest paid and experience high degree of stigma and discrimination, including increased risk of violence and sexual harassment at, and on the way, to work.^{cii}

Despite gender-based discrimination being prohibited through number of legal instruments, Vietnam continues to have gender pay differentials. On average gender pay gap is at 10%, and in foreign invested companies the gender pay gap has been the widest.^{ciii} Prospects for promotion and holding decision making positions are poor. Stereotypical perceptions about women, combined with structural discrimination in areas such access to training, productive resources, recruitment practices, or state support for childcare, have all contributed to the fact that woman are strongly underrepresented at the top. Some sources indicate that only 5.0% of the presidents of large companies and 9.7% of the vice presidents are woman.^{civ} There are also 10% more women than men in so called 'vulnerable' work, with women accounting for a clear majority of 'unpaid family workers' (60.4%), who in particular are regarded as vulnerable given their limited access and control over wages, job stability and access to social protection.^{cv}

One step forward two steps back: diversification, gender equality, and new wave of liberalisation

Vietnam is now in a critically important time and at the beginning of the new chapter in its pursuit of global market integration. It has just recently signed 2 new trade and investment agreements: Trans-Pacific Partnership (TPP) with the US and others;^{cvi} and a Free Trade Agreement with the EU (FTA).^{cvi} These agreements open up the possibility for Vietnam to consolidate its position as a regional manufacturing hub, while for rich trading partners like the EU or the US, they offer access to Vietnam's burgeoning consumer market and investment opportunities in previously unexploited sectors.

As shown above, moves to strengthen the country's export profile and boost growth have not necessarily yielded equal benefits to women as men and at times even have added up to deeply entrenched gender inequality on the labour market and beyond. Moreover, as initial assessment of both TPP and FTA shown, and experience of other countries such as Bangladesh suggests, full trade liberalisation might actually undermine development of emerging higher-value added sectors, and push the country towards mass production of cheap clothes and shoes, putting downward pressure on wages and working conditions,^{cvi} adding even more weight to already existing gender inequality, discrimination and occupational segregation.

Arguably, there is a stronger tradition of workers' rights and more equal gender relations in Vietnam than in many other countries in Asia. And there is no doubt that looking forward, workers' mobilisation, and especially women's mobilisation, will be fundamental to resist any potential race

to the bottom on wages and rights, both in labour intensive sectors and/or potential defeminisation in more capital and skill intensive industries if they are to emerge.

Yet to be able to truly benefit from the new wave of trade agreements and create more, better and decent jobs for all, and not in a few, but various high value and productive sectors, Vietnam urgently needs a long-term vision for industrial policy married with its policies on women's rights, such as Vietnamese National Strategy on Gender Equality for 2011-2020 period.^{cix}

Relying on women's cheap plentiful and flexible labour and the manufacture of low value-added goods is neither a sustainable strategy for economic development, nor a silver bullet for women's economic empowerment. It is time for ambitious, just and visionary politics driving inclusive and gender-responsive growth through economic diversification. The section of this paper presents number of recommendations relevant for Vietnam, Bangladesh, and other governments of export manufacturing developing countries, as well as for donors and international financial institutions and multinational corporations to do just that.

Table 1. Overview of some key industrial, gender equality and employment indicators for Vietnam

Total Export Quality	Total export equality in 2010 was 0,79 and increased quite substantially from 2000 (0,65); 105 value out of 178 countries for which data is available. Source: https://www.imf.org/external/np/res/dfidimf/diversification.htm
Total Export Diversification	Export diversification has substantially increased from 3,13 in 2000 to 2,41 in 2010 (higher value means less diversity) and is 50 for 187 countries with data. Vietnam's export includes textiles, garments, footwear, coffee, automobiles, machinery, and electronics, among others. Source: https://www.imf.org/external/np/res/dfidimf/diversification.htm
Exports of goods services as a % of GDP	In 2015 export of goods and services accounted for 89,8% of Vietnam GDP, sharp increase since 2000. Source: http://data.worldbank.org/indicator/NE.EXP.GNFS.ZS?view=chart
OECD Social Institutions and Gender Index (SIGI)	Vietnam SIGI variable spanning all stages of a woman's life, from discriminatory family code, physical integrity, son bias, access to resources and assets, and restriction on civil liberties was assessed at 0,18 or as 'medium' levels inequality. Source: http://www.genderindex.org/country/viet-nam
UNDP Gender Inequality Index (GII)	The GII measures gender inequalities in 3 aspects: reproductive health, empowerment and economic status. In 2014 Vietnam GII was 0,30 - slight improvement from 2005 (0,33), and 60 out of 188 countries with data. Source: http://hdr.undp.org/en/composite/GII
Violence against Woman	A 2010 General Statistics Office study using the global WHO methodology on domestic violence found that 31,5% of women have experienced physical violence at some time, but more than 50% have experienced emotional violence. Source: https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7650.pdf
Time spend on unpaid care / household work	Women spend approximately half as much time as men a week on housework. 2008 Vietnamese Living Standards Survey data revealed that urban women spent on average 17.5 hours a week compared to 11.2 hours in the case of men; while rural women spent on average 15.4 hours compared to men's 10.2 hours. The same survey also found that 44% of men did not contribute to housework at all compared to just 21% of women. Source: https://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/7650.pdf
Labour force participation	Labour Force Survey (2014) by General Statistics Office estimated women's labour force participation at 73% - one of the highest in the region - while

	men's at 82,5%. Source: https://www.gso.gov.vn/default_en.aspx?tabid=515&idmid=5&ItemID=15115
Employment by sector	According to the ILO indicators, in 2010 (latest available data) 50% of woman were employed in agriculture (compared to men 45%), 34% were in services (men 30%) and 17% were in industry (men 25%). All economic sectors employed more men than women with the exception of foreign invested enterprises where women accounted for 66% of the workforce. Source: http://www.ilo.org/global/statistics-and-databases/WCMS_424979/lang-en/index.htm and : https://www.gso.gov.vn/default_en.aspx?tabid=515&idmid=5&ItemID=15115
Vulnerable employment	While ratio of men and women as 'own-account workers' is similar (41.6 females, and 40,1% males), there are 10% more women than man in vulnerable employment (68.2% females compared to 56,6% males), as woman dominate in 'contributing family workers' category (26.5% female, and 16,5% male) Source: https://www.gso.gov.vn/default_en.aspx?tabid=515&idmid=5&ItemID=15115 .
Wage gap	According to the Labour Force Survey (2014) gender wage gap is relatively small in Vietnam and at 10%, as globally women's average wages are between 4 and 36% less than men's. The Global Gender Gap Report (2016) by the World Economic Forum found female to male ratio on wage equality for similar work to be at 54%, and scored Vietnam as 77 out of 144 countries surveyed on wage gap. Sources: http://www.ilo.org/wcmsp5/groups/public/---asia/---ro-bangkok/---ilo-hanoi/documents/publication/wcms_349666.pdf and http://reports.weforum.org/global-gender-gap-report-2016/economies/#economy=BGD

Conclusions and Recommendations

The global community increasingly recognises that a race to the bottom on pay and conditions is neither economically sustainable nor socially desirable. As such, governments have committed to achieving inclusive growth and decent work for all in the new Sustainable Development Goals. This includes by promoting diversification and technological up-grading of economies, along with promises to reduce inequalities within and between countries (Goal 9). They have also committed to achieving gender equality and the empowerment of all women and girls (Goal 5), underlining existing binding promises made under the Beijing Platform for Action, Convention on Elimination of All Forms of Discrimination against Women (CEDAW) and relevant ILO conventions.

Export-led growth remains a favoured strategy for reaching these goals, accompanied increasingly by efforts at economic diversification. ActionAid's new research suggests that countries with more gender equal institutions and policies have a stronger export profile in terms of both diversity and quality. On the obverse, countries with lower levels of gender equality also have weak export profiles. These initial findings raise many questions about how countries that are successful on both counts have moved up the value chain, and what has been the role and impact these industrial reforms have had on women in the labour market and what other factors might contribute to greater gender equality.

The case of Bangladesh illustrates how full trade liberalisation and government's over-reliance on just one garment industry have exploited woman's labour to boost economic growth and foreign brands' profits. Yet not only country's gender equality levels have been down; average was also quality and diversity of its export. Paving the way for emerging industries to enter the playing field and drive new industrial policy will be politically and financially complex. But it is imperative to ensure that there is no more reproduction of gender inequalities that repeatedly leave women in the most marginalised position in the labour market and beyond.

In contrast to Bangladesh, Vietnam's export is far more diversified – though labour-intensive production prevails- and its scores on gender equality in SIGI and UNDP indices are better, in line with the overall finding in ActionAid's latest analysis. Nevertheless, structural gender discrimination and stereotypical attitudes around what constitute 'appropriate' work for woman result in highly segregated labour market with women in least paid jobs at the bottom. This example clearly shows that economic diversification alone will not automatically lead to gender equality, creation of decent jobs and woman enjoying their economic rights.

Efforts to diversify and increase inclusivity of economies must, therefore, be accompanied by robust strategies to end discrimination against all women in labour markets, and uphold their right to access to decent work. This includes addressing structural barriers, such as recognition and redistribution of women's unpaid care burden through provision of quality, gender responsive public services, financed through a system of progressive taxation. Women's rights to collectively organise need to be upheld, along with measures to strengthen state and corporate accountability. These strategies must not be merely on paper but be implemented in reality, and form part of a coherent approach to meeting wider, binding international commitments on gender equality and human rights.

Not least, such coherent approach requires a rethinking of the current global economic model, including by expanding developing countries' policy space to determine the path of their economies, and preventing powerful multinationals from playing countries off against each other at the expense of workers' – especially women workers' – human rights.

RECOMMENDATIONS:

Governments, donors, international financial institutions:

1) End gender-based discrimination in labour markets and adopt macroeconomic and other policies that protect, respect and promote the rights of all women to decent work

- Fully implement all international commitments on women's economic rights and rights to decent work, including the Beijing Platform for Action, CEDAW, the ILO Fundamental Conventions, and relevant goals and targets of the SDGs, by instituting robust policies and legislation to end gender discrimination in labour markets and in wider society.
- Work with women's organisations, unions and wider civil society to develop women-led strategies for redressing gender segregation in labour markets and the wider gender discrimination that underpins it.
- Systematically review the impact of trade, investment, fiscal and other macroeconomic policies on women workers in the global South, and implement strategies for redressing gendered inequalities in opportunities, impacts and outcomes, alongside underlying discriminatory social norms.
- Conduct gender impact assessments to understand how economic diversification and upgrading of manufacturing may affect different groups of women (e.g. young, migrant or ethnic minorities), and implement strategies for overcoming negative impacts.
- Address the barriers to developing countries' ability to pursue strategies to diversify and upgrade their economies. This includes revising international trade rules that circumvent countries' ability to strengthen and protect domestic and infant industries, or to institute controls over highly mobile inward and outward capital flows.
- Institute strong frameworks regulating the behaviour of corporates to ensure they respect and promote the rights of all workers, and are held to account where rights violations occur.
- Ensure gender-disaggregated data is provided for all SDG Goals and targets, including Goal 8, so that progress and blockages in achieving inclusive growth and decent work for all women and men can be tracked and addressed.
- Support the proposed ILO Convention on gender-based violence in the world of work.

2) Recognise, reduce and redistribute women's unpaid care work

- Institute gender-responsive planning and budgeting, devised with the full and meaningful participation of women and women's rights organisations, particularly the most economically and socially marginalised.
- Take action to reduce and redistribute women's unpaid care work by implementing family friendly workplace policies, such as shared parental leave, and investing in quality, accessible, affordable, gender-responsive public services and universal social protection, including for women working in the informal sector, financed through a system of progressive taxation.

3) Promote women's voice and uphold the right to engage in collective bargaining

- Uphold the right of all workers to freedom of association and collective bargaining; actively enter into social dialogue with unions and workers' organisations, and ensure all workers have access to effective remedy and redress.
- Support and resource women's full and meaningful participation in shaping the implementation of the SDGs, including Goal 5 and 8, and in holding their governments to account for these and other binding human and labour rights commitments.

Corporates

- Respect the right to decent work of all workers throughout corporate supply chains, including by paying a living wage, ensuring equal pay for work of equal value, safe working conditions, secure contracts with parental leave and social protection, upholding collective bargaining rights, and ensuring equitable employment, training and promotional opportunities for women.
- Pay a fair share of tax and do not engage in strategies to deliberately minimise corporate tax burdens at the expense of developing countries.
- Consider long-term investment strategies in developing countries, along with measures to support knowledge and technology transfers, to help drive up pay and working conditions while fostering inclusive and sustainable growth.

ⁱ According to the International Labour Organisation, that decent work involves opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organise and participate in the decisions that affect their lives and equality of opportunity and treatment for all women and men. See: <http://www.ilo.org/global/topics/decent-work/lang-en/index.htm>.

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^{iv} Tejani, S and Milberg, M. (2016) 'Global defeminisation? Industrial upgrading and manufacturing employment in developing countries' in *Feminist Economics* (2016), Vol. 22, No. 2, Pp. 24-54.

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