



WOW // Work and
Opportunities
for Women

COVID-19 response of multinational companies working in highly ‘feminised’ sectors

WOW Helpdesk Query 66

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Executive Summary

The purpose of this report is to help FCDO understand how the private sector has included women's economic empowerment in their value chain response and recovery efforts from COVID-19 and what FCDO can do to support the private sector to build back better and assist women returning to work. This report is informed by a desk review of available literature and a small number of interviews with multi-national companies. The bulk of the evidence for this query comes from Asia and Africa. The review examines company responses using a lens of women's economic empowerment which encompasses job protection, access to assets (such as finance) and gender-specific constraints to decent work. This query sought to answer three main questions, which we have included in this Executive Summary in bold together with a summary of the findings from each question:

1. Since the COVID-19 pandemic started, what have companies in “feminised” sectors done to protect women's employment in their supply chains?

The researchers found some data available on actions companies have taken to protect women's employment and enable women's economic empowerment in their value chains. Key actions included honouring supplier payments in the garment sector to support suppliers to pay wages to workers, including women workers, adapting programming to respond to heightened risks such as GBV and supporting emergency access to finance. However, some responses only took place after public pressure (for example honouring supplier payments) and others were small-scale and not integrated across their value chains. In the small sample of interviewed companies, those in the agricultural supply chains were more likely to connect their activities on COVID-19 response and recovery to supply chain resilience and sustainable supply, whereas the garment company focused more on financial resilience of workers to withstand economic shocks.

Overall, limited data was available, highlighting the ongoing gap of gender data within value chains. This also indicates a lack of public accountability for workers, civil society, investors and customers on whether multi-nationals adequately addressed the needs of women in their response to COVID-19, given they were disproportionately impacted. This lack of data also indicates a risk that companies did not fully support women in their value chains in their COVID-19 response and that gender may not be adequately integrated into their COVID-19 recovery plans.

2. What lessons have these companies learned about how to protect/safeguard women's employment, how to get women back into work, and adaptation to new forms of work and new working practices post-COVID?

The companies interviewed in the research reported that they did not fully understand nor adequately address the risks faced by women in the initial waves of COVID-19. They reported this was due to the need to think and act quickly during the early stages of the pandemic when impacts to their value chains were uncertain. Some companies highlighted new understanding of the risks to women workers from the pandemic – from the risk of increased teenage pregnancy impacting women's ability to join the workforce to a deeper understanding of the importance of financial resilience including strong social protection mechanisms. Based on the information available, we did not come across any robust strategies that companies put in place to support women in the COVID-19 recovery and in adapting to new working practices.

3. What strategies will these companies be using in the future that will likely enable supply chains to better withstand the impact of COVID-19 as well as future crises, and to contribute to improving outcomes for women's economic empowerment?

The companies interviewed in the research were early in discussions on how COVID-19 would impact their response to future crises. One company had developed a new sustainability strategy with a focus on financial resilience as a key pillar in supporting stronger and fairer value chains. Another company did not yet have strategies in place but recognised the need to develop more robust approaches for future crises. One common theme in the response was the link between the current COVID-19 crisis and the climate crisis. Companies recognised the importance of preparing for the climate crisis, the impact this will have on people especially women and highlighted the need for more information, funding, and support to help companies adapt to this huge challenge.

The report outlines key recommendations for FCDO based on company feedback on where they need support and gaps highlighted in the research:

Champion: *Prioritise working with business on embedding WEE into their COVID-19 recovery plans, climate change interventions and building more resilient supply chains as well as embed WEE into future FCDO/HMG economic development programming.*

Convene: *Bring together businesses to agree shared strategies to support women in value chain in the COVID-19 recovery and future crises.*

Fund: *Support evidence-based solutions to scale, support social dialogue and women's voices in global value chains and fund work on climate and WEE so gender is integrated from the beginning.*

Influence: *Invest in countries seeking to make positive change to labour market policies and work with business to influence governments to support women workers, including on social protection.*

1. Introduction

Research questions and methodology

FCDO requested the WOW helpdesk to help them understand how companies have supported women workers and producers in highly “feminised” sectors to respond to and recover from the COVID-19 pandemic. The objective of the research is to help FCDO understand how they can enable and influence companies to enhance women’s economic empowerment in their supply chains during the recovery and future crises.

The research was designed to answer the following three questions:

1. Since the COVID-19 pandemic started, what have companies in “feminised” sectors done to protect women’s employment in their supply chains?
2. What lessons have these companies learned about how to protect/safeguard women’s employment, how to get women back into work, and adaptation to new forms of work and new working practices post-COVID-19?
3. What strategies will these companies be using in the future that will likely enable supply chains to better withstand the impact of COVID-19 as well as future crises, and to contribute to improving outcomes for women’s economic empowerment?

To address these questions a desk-based review was undertaken. Information on how companies had integrated women’s economic empowerment into their COVID-19 response was sourced through reviewing key reports on the pandemic, websites of key actors and through an online search. This paper will focus on the garment and agricultural sectors as key “feminised sectors”.

To ensure robustness of findings, there was a purposeful attempt to cover both industries and reflect findings from different regions. However, most of the evidence focussed on the response of the garment sector as it is much more concentrated and received more publicity in the immediate response to COVID-19. Within the garment sector this report includes references to the informal sector but focussed on the ready-made-garment sector (RMG). In the agri-business sector the evidence this reports references women engaged as workers (for example in processing or on commercial farms) and as producers. We have made this distinction clear throughout.

Limitations and structure

This report is based on a desk-based review and interviews with companies. However, the research was limited by the following challenges:

- Literature on the global response to COVID-19 is still evolving as despite fundamental shifts such as vaccine roll out in some countries, the world is still in a pandemic.
- More data is available on the immediate response to the pandemic and therefore longer-term implications for women workers may not be clear.
- Data on company responses to the pandemic in their value chains is limited. There has been limited analysis and much data is only available in publicity statements from companies themselves. The researchers found limited independent analysis of what actions companies have taken to support workers, including women workers and producers, in their value chains. Within this there is even less information available on the response specifically for women workers and producers.
- There is more data available on the response from the garment sector as it is more concentrated in fewer countries and there was significant media attention on the impact on this sector. Data on the agriculture sector is more nuanced as it is a more fragmented sector and therefore COVID-19 had a range of impacts.

- The researchers did not interview as many companies as planned. Three companies were interviewed with data supplemented by desk review and talking to people who work with the companies. Many companies were unable to take part due to time limitations and for many it felt too early to discuss the impacts of COVID-19 which they felt were ongoing. This means the sample of companies is very small and will impact the validity of the findings.
- The researchers gathered information from companies in 1-hour calls to adapt to the time availability of respondents. This proved inadequate to go into depth on the issues covered in the interview. Therefore, some information may lack sufficient detail.
- One company was unable to find time to have a full one-hour call with the research team, so we only gathered partial information on their response to COVID-19 and did not gather information on their future plans and recommendations for FCDO. They were unable to follow up with written information due to time limitations.

The report is structured into four sections: introduction, overview of the context which influenced how companies responded to COVID-19, how companies responded and finally conclusions and recommendations for FCDO.

2. Evidence mapping: Context impacting how companies responded to COVID-19 in feminised sectors

Background and Context – the impact of COVID-19 on Global Value Chains and women

Prior to COVID-19, women in developing countries had been entering the formal workforce at unprecedented rates especially in agriculture where one in four employed women was working (Jalan 2020) and in garments. They also play an important role in informal and small-scale farmer production but are often underrepresented in data. The majority of wage workers in garments and food are female and they tend to be in lower paid precarious jobs (WOW, 2020a).

The garment sector and parts of the agricultural sector were particularly adversely affected by COVID-19. This hit women particularly hard and exacerbated pre-existing barriers to women's economic empowerment including social norms around male breadwinners and women taking on the majority of unpaid work and care (WOW, 2020a). To put the company findings in context, pre-existing barriers to women's economic empowerment and the impact of COVID-19 on these two sectors will be set out, before analysing the private and public sector response.

Impact of COVID-19 on women working in global value chains

Data is still being gathered on the medium and long-term impacts of COVID-19 for women working in global value chains. Much of the early literature focussed on short-term impacts including WOW's (2020a) "Building back equitable: Spotlight on COVID-19 and women workers in global value chains". Below we list short and long-term impacts for women working in global value chains:

Short-term impacts:

- Women in the garment sector faced increased lack of access to basic necessities, greater risk of gender based violence and increased exposure to risk of infection of COVID-19 in and outside the workplace and increased unpaid care work (ILO, 2020a).
- Women make up most of the seasonal and part-time work in food production – roles amongst the first to be laid off (WOW, 2020a)
- Reports and assessments by trade unions and international organisations show that workers in the fresh flower value and tea chains (majority women) were often not paid for weeks at a time due to reduction in demand and cashflow issues. (WOW 2020a)
- Women's views were not always included in surveys on impact on COVID-19 on small-scale agriculture as their role is often unrecorded (WOW 2020a)
- In comparison to men, women tend to take up the burden of unpaid work and care, are more vulnerable to gender-based violence and tend to miss meals or eat smaller portions when food is scarce (CARE, 2020). This has all increased due to COVID-19 and risks further exacerbating women's barriers to employment opportunities and their ability to work (CARE 2020, UN Women 2021a).

Longer-term impacts

The following information is focussed on risks to women's work as data and insights are still being gathered and analysed:

- Risk of long-term unemployment for women if remaining jobs are not deemed socially acceptable for women due to acceleration of technical upgrading and other sector restructuring (McKinsey and BOF, 2020)
- Adverse effects on generations to come as data from previous recessions has shown loss of women worker's incomes in lower-income households have greater long-term impact on their family's education, health and nutrition (ILO, 2020a)

Garments

This section will outline the impact of COVID-19 on workers in the garment global value chains (GVCs) and the impacts for women. The garment sector was severely affected by COVID-19 as clothing was deemed non-essential (WOW, 2020a). This was particularly pronounced during the initial months of the pandemic, which led to longer-term job insecurity despite a gradual increase in demand. The impact of this was concentrated in Asia and the Pacific where millions of workers in the supply chain were left either jobless or unpaid for work they had already carried out (ILO, 2020b). Women garment workers were disproportionately affected as they make up the majority of the workforce (35 million) and the garment sectors in those regions are the largest employer of women (5.2% of all working women) (ILO, 2020c).

China was the first country to go into lockdown globally and this led to supply shocks across the garment sector which relies on China for raw materials. Other nations (e.g. Bangladesh, Cambodia,

Myanmar, Pakistan, Sri Lanka and Vietnam) were therefore unable to continue production at the same level due to lack of access to raw materials in the short term (MacDonald, 2021). As lockdowns began to be enforced globally, demand for garments dropped significantly with buyers either cancelling or failing to pay for orders that had already been completed worth \$16.2bn between April-June 2020 (ILO, 2021a). Although some companies decided to later honour their orders due to adverse publicity, Business & Human Rights Resource Centre (BHRRC, 2021a) estimate there were \$5.8bn of unpaid wages which would have had a significant negative impact on workers and in particular women who make up most of the garment workforce.

Income insecurity was exacerbated with thousands of factories closing (temporarily or permanently) leading to significant worker layoffs. In Bangladesh where women account for 80% of the Ready Made Garment workers (ILO and UN Women, 2020), over 1 million garment workers were either fired or furloughed; 98.1% of buyers refused to contribute to furlough wages and 97.3% refused to contribute to severance pay (MacDonald, 2021). The typical worker lost at least two to four weeks of work and only 60% were called back into factories once supply picked up (ILO, 2020b). Those who remained employed typically reported a decline in wage payments (LeBaron et al, 2021). These challenges were worse for informal workers. A significant proportion of women garment workers are 'hidden' including homeworkers and other informal workers without contracts and access to social protection (WOW, 2020b). More than half of all factories in Asia subcontract to smaller workshops and homeworkers and in India alone, there are an estimated 5 million homeworkers in the garment industry (MacDonald, 2021). Buyers and governments tend to have no or low visibility over these workers meaning they were not eligible for social protection schemes such as furlough (Fair Wear, 2020).

Although it is hard to understand the overall impact of COVID-19 on women's employment in the garment sector due to a lack of disaggregated data, it is clear women have disproportionately lost jobs with employment falling 4.2% globally in comparison to 3% decline for men (ILO, 2021b).

Agriculture

This section will outline the impact of COVID-19 on people who work in agriculture GVCs and the impacts for women. The agricultural sector is more fragmented than the garment sector as it covers a heterogeneous range of products and is less concentrated geographically in comparison to the garment sector. Overall, there was mixed impact on workers and producers in the agricultural sector with food production remaining high as it was deemed essential but demand for other agricultural products with highly "feminised" workforces such as flowers declining significantly. Women play a significant and often unrecorded role in agricultural GVCs as processors, and small-scale agricultural workers (WOW, 2020a).

Food demand remained high with supermarkets staying open during lockdown where they reported unprecedented sales. Like-for-like food sales grew by 11.1% across listed UK retailers on average during the second to fourth quarter of 2020 (Oxfam, 2021). COVID-19 led to increased operating costs due to the need to provide PPE and health & safety measures to curb the spread of the virus (Partner Africa, 2020). This led to a reduction in income and jobs for food processors who were made to change to fit the business workload and therefore some were paid for two weeks and then were given two weeks of unpaid leave (Business & Human Rights Resource Centre, 2020) or were laid off (WOW, 2020a). Seasonal and part-time workers were the first to be laid off which disproportionately impacted women workers who make up the majority of these groups (WOW, 2020a). Other food processors had to deal with labour shortages due to migrant workers being banned or unable to travel during global lockdowns (OECD, 2020).

Highly “feminised” agricultural sectors were hit particularly hard for example fresh flowers and tea (WOW, 2020a). Most flower suppliers laid off at least 50% of their permanent workforce and all of their seasonal workers (majority women) without paying them (WOW, 2020a). Many women workers in tea production did not receive payments for weeks or even months due to cash flow issues (WOW, 2020a) and lost out on work in comparison to men (Oxfam, 2021). For example, women working on tea plantations in Assam lost out on 45 days’ work on average compared to 33 days for men (Oxfam, 2021).

As well as their role in food processing, women play a significant role as small-scale agricultural workers helping to grow and harvest crops (Alvi et al, 2021). Women small-scale agricultural producers have been disproportionately impacted by COVID-19 due to a number of reasons including losing their ability to sell their crops, earn an income and access information through group meetings due to lockdowns, sudden mass male migration leading to reduced remittance payments (Shrestha and Leder 2020) and an increase in rural labour supply leading to an increased risk in women being pushed out of work (Alvi et al, 2021). A study of women small-scale agricultural producers in India and Nepal showed that nearly 50% reported a reduction in productivity due to lack of availability and access to information due to lockdowns (Alvi et al, 2021).

Public Sector Response

Private companies do not operate in silo but within the regulations and policies set out by governments in each of the countries they work in. Therefore, this section sets out an overview of the public sector response both globally and within some relevant garment and agricultural producing countries. Governments put in place several measures to support formal workers from the impacts of COVID-19 which include income/wage payment support, employment protection, COVID-19 related sick leave and subsidies (ILO, 2020b). These measures were often not accessible for informal workers who tend to be made up of temporary, part-time, self-employed, women, youth, migrant workers and workers with disabilities (ILO, 2021c).

According to UN Women’s COVID-19 Global Gender Response Tracker (2021), as of March 2021, 219 countries and territories have taken 3,112 measures in response to COVID-19. Of these 41% (1,299 measures) across 187 countries and territories have been identified as gender sensitive (UN Women, 2021). The majority of these measures (823 in 149 countries) focus on actions to address violence against women and girls, while measures to strengthen women’s economic security (287) and address unpaid care work (180) are much fewer in number (UN Women, 2021).

UN Women Definition of Gender sensitive measures (COVID-19 Global Gender Response Tracker, 2021)

Government measures are identified as gender sensitive when they seek to directly address the specific risks and challenges that women and girls face as a result of the pandemic:

- All violence against women government measures are categorised as gender sensitive by default;
- Social protection and labour market measures are defined as gender sensitive if they target women’s economic security or address unpaid care;
- Fiscal and economic measures are defined as gender sensitive if they provide support to female dominated sectors of the economy, on the assumption that this is likely to protect women’s employment and thereby their economic security.

Violence and harassment against women and girls

Violence and harassment against women and girls are widespread in global value chains (WOW, 2020b) and at home which impacts their ability to engage productively (BFP, 2019). Violence against women and girls has increased in the wake of COVID-19 in the home and in the workplace. An estimated 243 million women and girls aged 15-49 were subjected to intimate partner violence over the previous 12 months (UN Women, 2021). Measures to address this by governments have been primarily centred around strengthening existing services and creating alternative measures for survivors (UN Women, 2021). For example, in India, key helplines have been made available at the national and sub-national levels where female officers have been put in charge of handling all GBV cases (UN Women, 2021). In Bangladesh, the Ministry of Women and & Children Affairs (MOWCA) has been providing digital legal advice and psychosocial counselling to survivors (Un Women, 2021). Although the measures are not specifically targeted to women workers in “feminised sectors” it is an important policy area to consider given how widespread it is (WOW, 2019).

Labour market measures

Labour market measures to support women to go back to work or gain employment in the wake of COVID-19 is particularly important in the garment and agricultural sectors, where women make up most of the workforce and the majority of those laid off as a result of the pandemic (WOW, 2020a). Some gender sensitive examples include in Australia, Chile, Colombia and the Republic of Korea where they implemented programmes that facilitate women’s return to work, however these were outside major production countries (UN Women, 2021). Chile provided companies with an incentive to allow workers on suspended contracts to return and hire new personnel by subsidising salaries for up to 6 months with higher benefits for women, young people and persons with disabilities (UN Women, 2021). According to the UN Women COVID-19 Global Gender Response Tracker (2021), there are no examples of gender sensitive labour market measures in countries with significant garment and agricultural production.

Social Protection

Governments around the world put in place social protection measures to support formal workers from the devastating impact of COVID-19 which led to significant levels of layoffs (ILO, 2020). According to World Bank data from May 2021, total spending on social protection increased by nearly 270% since December 2020 and a total of \$2.9 trillion has been devoted to these programmes, representing around 3% of global GDP in 2021 (Gentilini et al, 2021). However, the data shows a negative correlation between national income and social protection coverage with much lower coverage rates for low-income countries at about 4.5% of the population in comparison to the average rate for middle income (19.3%) and high income (26.7%) countries (Gentilini et al, 2021). UN Women research from March 2021 shows that governments have adopted 1,700 social protection and labour market measures in response to COVID-19. However, only 23% of these measures (397) are gender sensitive (UN Women, 2021).

Some of the key social protection measures that governments attempted to put in place to support formal workers include wage payments, employment protection, cash transfers and food assistance (ILO, 2020b). For example, the Pakistani government banned dismissing workers during the lockdown but also announced that they would provide wage support worth \$18 a month to dismissed workers (ILO, 2020b). In India, the Kerala state government provided ingredients to over 300,000 children to support with food insecurity (UN Women, 2021).

Some governments tried to specifically reach informal workers for example in Thailand and Kenya (WIEGO, 2020a, UN Women, 2021); but the effectiveness of government social protection policies has been disputed by many as studies showed they failed to reach everyone (particularly informal

workers), were often delayed or insufficient (ILO, 2020b) or lacking in the case of unpaid care burden (UN Women, 2021). In the global south, 70% of women are informal workers who even before covid had little to no access to any type of social protection (WOW, 2020b).

Social protection policy failure towards women - Myanmar Garment Sector Case Study (Macdonald, 2021)

COVID-19 led to a cancellation of orders and drop in demand of garments. This resulted in 58,000 garment workers who lost their jobs of which 52,500 were women. The government announced it would cover 40% of the salary of workers who had lost their jobs due to factories closing. Only the workers registered with the Social Security Board were eligible which meant the social protection measure failed to reach many women workers who were disproportionately informal workers with no contract and little to no access to social protection.

It is also clear that there is a lack of policies around unpaid care which disproportionately affect women (ILO, 2020b). Only 11% of all social protection and labour market measures taken by governments since COVID-19 provided support for unpaid care (UN Women, 2021). A number of governments already had laws requiring factories to provide childcare facilities for example in India, Bangladesh and Cambodia prior to Covid-19 but the pandemic highlighted the lack of enforcement of these rules by governments, further exacerbating difficulties for women workers (ILO, 2020b).

Fiscal and Economic measures

A number of governments put in place fiscal and economic measures to support workers for example lower corporation and income taxes, loan deferrals, interest rate reductions and subsidised loans to help employers maintain workers' wages (ILO, 2020b). The section above on social protection shows that these did not necessarily translate into workers keeping their jobs or getting paid whilst on furlough and most of the fiscal and economic measures were not gender sensitive (UN Women, 2021). In general, women agricultural workers don't own the land they work on and have less access to information (CARE, 2020) meaning the fiscal and economic measures failed to reach them. UN Women research shows that 132 countries and territories have adopted 580 fiscal and economic measures to help businesses survive the pandemic, however, only 12% of these measures aim to strengthen women's economic security by channelling resources to female dominated sectors (UN Women, 2021).

Public sector measures to provide support against the impact of COVID-19 has been widespread but overall gender blind, failing to specifically support women workers from the impacts of covid that have exacerbated existing inequalities.

3. Evidence mapping: How companies responded to COVID-19 in feminised sectors

This section provides an overview of what measures multi-national companies took to protect women's employment in their supply chains. It takes data from desk research and interviews with three companies. We use the WEE conceptual framework (WOW, 2020c) to review company

responses beyond the protection of women's employment to how they address barriers to women's economic empowerment. This framework helps us highlight how companies have supported women's access to decent work ("work"), their access to control over assets such as finance ("assets") and cross-cutting constraints which impact gender equality ("gender-specific constraints").

Private Sector response to the COVID-19 pandemic

Companies responded to COVID-19 quickly based on their strengths, networks and the value chains they engaged in. However, the researchers found limited data available on actions companies have taken to support women's employment and women's economic empowerment in their value chains, and mixed evidence on how companies had supported workers overall in their value chain. This may reflect the nature of the health pandemic where companies responded on multiple fronts from health to finance, but also indicates a risk that companies did not effectively support women in their COVID-19 responses. This was also reflected in some industry level responses to protect workers in the pandemic such as the ILO Call to Action (ILO 2020d) which sought to catalyse action from across the global garment industry to support manufacturers to survive the economic disruption caused by COVID-19 and to protect workers. Business, international organisations, suppliers, trade unions and other sector actors were asked to endorse it. However, despite the strong call, it excluded any mention to female workers who make up the majority of garment workers and are often the most vulnerable. Gender-blind responses risk exacerbating existing gender inequalities so this lack of focus on women risks increasing barriers for women to participate equally in global value chains.

This section looks at how companies have responded to the COVID-19 pandemic, the extent to which they gathered data on the impacts of female workers and finally actions taken to support the needs of women workers and producers.

Overall responses to workers in COVID-19 pandemic

The research identified three ways in which companies had supported workers and producers in their value chain during covid – support to suppliers which indirectly impacts workers, initiatives to directly support workers and producers and finally broader support to communities including people engaged in the value chain. This section features some of these initiatives to highlight company's general approaches and to highlight where there are gender gaps. The following section will then share examples focused on women.

Supporting suppliers

The research found examples where multi-national companies adjusted procurement policies and practices in garments and agribusiness to reduce cash flow shocks for suppliers. In some cases, these mechanisms were used to enable ongoing payment of worker's wages. Supermarkets introduced policies for small suppliers such as immediate payment to support cash flow and indirectly support worker pay (Oxfam 2021). However, Oxfam found little evidence of support to international suppliers and questioned how long those policies will continue.

In garments, many buyers initially cancelled clothing orders citing force majeure clauses in contracts which released them of responsibility to pay suppliers for work already done. However, following significant public pressure, many garment brands such as Primark reversed this decision and either honored payments or agreed new payment terms for suppliers (BHRRC 2021b). The ILO Call for Action (ILO, 2020d) also committed companies to 'paying manufacturers for finished goods and goods in production.' This indirectly supported workers by reducing pressure on suppliers enabling them to free funds to pay worker wages – including women workers who are the majority of garment workers.

However, these mechanisms were also largely used to support direct suppliers and formal workers including women. However, one study found that less than half of the informal workers they surveyed received cash or food during government relief measures and what was provided was insufficient to impact significantly on food security and coping strategies (WIEGO, 2020b). Women make up the majority of informal workers in the sector and therefore the lack of focus on informal workers would have significantly impacted them.

The Business and Human Rights Resource Centre survey (BHRRC 2021a) identified a number of additional steps taken by garment companies to support supplier cash flow including supporting suppliers to access finance and creating pandemic policies on price reductions and discriminatory dismissals. For example, GAP and M&S adjusted payment terms to support supplier cash flow. Companies such as Lidl reported they tracked layoffs by demographic including pregnant employees and union members, however, further findings on the prevalence of unfair dismissal or information on resolution was not available. Primark set up a wage fund (Primark 2020a, 2020b) to ensure that workers were paid as soon as possible for Primark product in seven production countries. They paid out over £23 million. However, it is unclear what the impact was because Primark also reported that when production started up again the fund essentially became an advance for suppliers on the wage component of the £370 million worth of orders that were finished and/ or in production (Labour behind the Label, 2020).

As shown above, there is limited evidence that companies took a gender lens when looking at wage protection and financial support to suppliers. Although responsible buying practices should in theory help support women's income and employment during and after COVID-19, one company interviewed by the researchers raised an additional challenge of ensuring that responsible buying practices outlined above do support workers, especially if the supplier has multiple buyers with different policies. They reported they focussed their efforts on remote due diligence such as checking records to see if workers are paid and if furloughed workers received their legal entitlements. This highlights the importance of companies having strong due diligence in place which gathers gender-disaggregated data on whether workers receive their entitlements. However, it also highlights how wage support focussed on formal workers and the importance of policies and inclusive government safety nets to support all workers including informal workers, during times of economic shock.

Supporting workers

During the desk research, the researchers found limited data on what specific actions companies had taken to support workers in their value chains. Companies like M&S provided a detailed response (Marks and Spencer, 2020) on its support in the food and clothing & home value chains. However, despite providing detailed information, included on how they listened to workers, there was not any references to gender or the specific risks to women workers.

At the beginning of the COVID-19 pandemic, FCDO also commissioned new work through Vulnerable Supply Chain Facility (VSCF) as part of the Business Partnerships for Global Goals (BP4GG) programme. VSCF's objective was to enable vulnerable people within garments and agriculture supply chains in Africa and Asia to recover from COVID-19 and responsible businesses were supported to build on these experiences to become more sustainable. VSCF supported eight partnership projects, including with M&S, Tesco, Sainsbury's, Monsoon and Primark (ETI 2020). FCDO's annual report 2020/2021 (FCDO 2021) reported the initiative explicitly targeted women who are more likely to have lost jobs. Interventions included food relief for informal and vulnerable garment workers, many of whom were women, health facilities and education for female garment workers, conditional cash transfers to vulnerable garment workers in Myanmar and health and income support for women workers in Kenya's flower sector. Due to the timing of the pandemic, activities were largely focussed on immediate emergency relief for vulnerable workers including women. However, it is unclear from

publicly available data whether these interventions will also support women's recovery from the pandemic and protection of women's jobs.

In company interviews, the researchers found examples of direct support to workers and producers. As COVID-19 is first and foremost a health crisis, companies prioritised health responses both within the workplace and to rural populations in their value chain. The actions below also highlight the wide impact of COVID-19 and how companies expanded support beyond their usual supply chain interventions. One company highlighted that COVID-19 had sparked an internal question on where business responsibility lies because the impact of COVID-19 was so far reaching across their value chain and covered areas like health which they felt unequipped to deal with.

In this small sample, companies working in the agricultural supply chain were more likely to connect their activities with the need to support resilience of their value chains and sustainable supply whereas the garment company focussed more on financial resilience of workers to withstand economic shocks.

Overall companies reported key efforts in the following areas:

- **Communication and health messages.** Three out of three companies raised awareness with suppliers and workers on how to manage the risk of COVID-19 and stem transmission in the workplace.
- **Health:** Three out of three companies provided additional support for workers and farmers including oxygen concentrate to rural populations, medical care, supporting quarantine centers and hygiene kits.
- **Food:** Two out of three companies provided food parcels for vulnerable populations including migrant workers and in food insecure contexts.
- **Finance:** Three out of three companies provided some financial support to some workers in their value chain including grace periods for farmers to repay inputs, emergency loans and ringfencing labour costs in production.
- **Access to digital:** Two out of three companies fast tracked digital solutions like digital loan platforms and health education to help producers access information and finance during the pandemic
- **Human rights risks:** Two of three companies highlighted major human rights risks that they channeled more resources into during COVID-19:
 - **Non-payment of wages:** The company carried out remote due diligence including review of supplier wage records. In one case they identified a supplier that had double books which meant that some workers were not receiving social security payments. They worked with the supplier to tackle this issue.
 - **Child labour:** After recognising the increased risk of child labour due to labour shortages, one company focussed its efforts on supporting the labour shortage through mechanisation and sensitisation of workers on child labour risks.

Supporting communities

Finally, the research identified examples where companies had focused on philanthropic support to communities within and around their value chains reflecting the shifting role of business when responding to a health pandemic. Nestle for example focused on emergency relief and provision of

food. They partnered with the Red Cross and Red Crescent to donate food, medical nutrition products and bottled water to those most affected by the pandemic and donated CHF 10m (£8 million) for immediate deployment in countries where it is most needed. Mars invested \$5 million to provide emergency supplies, awareness-raising and cash transfers and Mondelez invested into CARE's Emergency Response Fund to provide clean water, health supplies and food parcels. Cargill invested \$35 million in COVID-19 relief efforts focussing on providing response efforts in its global operations and supply chain communities related to: food security and nutrition, health and safety, agriculture community support, and food industry support. Companies also engaged in public-private partnerships including Unilever who worked with FCDO to launch the £100 million HBCC (Hygiene and Behaviour Change Coalition) global effort. Companies were more likely to focus community relief efforts on women if they already had partners that specialised in supporting women and girls for example Mars extended cash transfer to vulnerable households, predominately women in their mint value chain in India.

Overall, despite the limited evidence available, it appears companies took a range of actions to support suppliers and workers in their value chains. However, actions appear piecemeal and dependent on the company's current human rights due diligence approaches. There was also limited evidence that companies had mainstreamed gender into their overall COVID-19 responses which will be explored in the next section.

Response to women workers in COVID-19 pandemic

This section will review company support to women workers and producers in the pandemic. It will look at how companies gathered information on the risks to female workers and will then use the WEE framework to highlight actions that companies took and gaps identified.

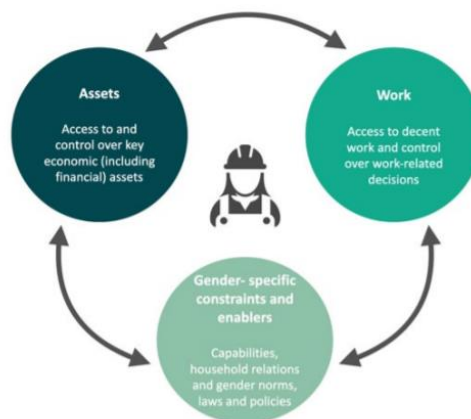


Figure 1: WEE conceptual framework (WOW, 2020c)

Gathering data

UN Foundation (2020) reported that the absence of statistics reflecting the lives of women and girls rendered many gender inequalities invisible. They reported that adequate and timely data is crucial to form COVID-19 responses such as gender-disaggregated data on job losses and unemployment. The researchers found evidence that companies interviewed in the research had gathered data on gendered impacts during the pandemic, but as shown below, this data was not timely and did not always inform their responses. This is in line with research from the World Benchmark report on gender (World Benchmarking Alliance, 2021) which found that only 20% of companies consulted with relevant parties such as women's organisations, gender experts or potentially affected women as part

of their standard risk identification and assessment process. The desk review also found companies like M&S who reported on their response to COVID-19 (Marks and Spencer 2020) with no gender-disaggregation, however as they did not take part in interviews it is unclear whether they are collecting any gender-disaggregated data on COVID-19 recovery. This section highlights the risk that without regular robust data from women and their representatives, companies risk overlooking the specific needs of women and especially in times of crisis.

Three out of three companies interviewed during the research highlighted that they had identified women as a priority group during the pandemic, however this was often after the first wave of COVID-19. For example, one company reported that speed was the most important factor in their initial response, and they therefore didn't focus on gender-disaggregation in the first waves and didn't specifically look at gender impacts. A second company also highlighted the importance of a swift response "there is a time and a place for considered decision making [but in the case of COVID-19] we had to think and act quickly." This highlights a risk that if companies do not have a clear framework for mainstreaming gender in their decision-making processes, they risk ignoring the specific needs of women and even exacerbating risks that women face. Although the two companies cited above did gather general data on impact on women afterwards, this was months or up to a year after the onset of the pandemic.

Where the companies did gather data on the impact on women, they did this in partnership with actors in the value chain or partners that operated in the communities where women live. However, this happened sometime after the onset of COVID-19 and highlighted known risks, such as the gendered risks of COVID-19 on areas such as GBV and unpaid care as highlighted by organisations early on in the pandemic (CARE and IRC 2020, McKinsey 2020, UN Foundation 2020). For example, one company carried out a large-scale survey of producers a year after the pandemic started to understand the impacts on COVID-19 on their health and livelihoods. The survey highlighted challenges for women on food security, as well as increased unpaid care burden, increased risk of violence and greater negative impact on incomes. Another company gathered information through their partners to help identify groups most at risk from covid impacts which highlighted women along with temporary worker and small-scale farmers.

The researchers also found limited evidence of companies gathering data on the impact of initiatives during COVID-19 with the exception being companies engaged in large-scale programmes such as VSCF. Interviewed companies reported that the need to respond quickly to worker needs during COVID-19 meant they were not able to set up any new mechanisms to measure impact. This highlights a risk that companies cannot understand the impact of their programming, whether their investment is effective and what the outstanding needs are.

Work

The researchers found limited evidence available on how companies had supported women's access to decent work during the pandemic and how they plan to protect women's employment in the future. As shown in the previous section, some companies took steps to protect employment through supplier payments or ringfencing wage payment which may positively impact women workers. There were also some examples of companies monitoring discriminatory dismissals where women may be at higher risk. However, overall, there was limited focus on job protection for women workers.

Assets

The researchers found some evidence of companies supporting access to assets during the pandemic, including for women workers. Access to and control over assets such as finance, digital tools and production tools are key to women's economic empowerment. This was heightened during the pandemic when many lost access to ongoing sources of income from formal and informal employment. The evidence found examples of companies supporting access to finance but also found

examples of supporting access to inputs. One company had identified the potential of a mobile app used pre-pandemic to support women's access to emergency loans and was now ramping it up to formal and informal farm workers. They continued to focus the app on women workers in sectors badly impacted by COVID-19 including fresh vegetables and flowers. However, despite being targeted at women, the company reported that only 50-60% of loans were taken by women. Women used these during the pandemic to cover school fees or set up income generating activities whilst their work was disrupted by COVID-19.

In another example, a company provided an overview of an initiative not specifically to address gender but one that could have positive impacts for women. In their covid relief fund, they gave workplaces funding for workers and asked them to split evenly regardless of current wages. This may positively impact women who are more likely to be paid less than men. The company was unable to share information on the impact at this stage and whether the covid relief fund was able to support workers, particularly in facilities with multiple buyers.

Most initiatives to support access to assets, including finance, did not appear to be focused on the specific needs of women or the additional challenges they face accessing finance. For example, one company gave emergency loans to producers, and women and youth made up 70% of recipients in one of the countries. However, it was unclear if this was a deliberate strategy, and it was not replicated in other countries. The researchers also found limited evidence of supporting women's control over resources for example ensuring that women can lead or influence decision making in the household on how to spend the income they receive. When interviewing companies, all gave examples of the importance of digital assets and financial support to workers during the pandemic. However, interviewees were unable to share information on the additional challenges faced by women in accessing digital assets or accessing finance. For example, the ILO (2020a) reported that women workers in the garment industry face additional challenges accessing cash transfers as they have less access to bank accounts and limited mobile phone usage which may prevent them from receiving payments.

Gender specific constraints

Of the companies interviewed, two out of three gave examples of programmes that addressed gender specific constraints. Although all companies recognised key barriers to women's economic empowerment during COVID-19 such as unpaid care, the researchers did not find evidence amongst the interviewed companies of initiatives looking at lightening the care burden for women during the pandemic or restrictive social norms such as breadwinner bias. Instead, the focus was on other key issues such as GBV, in line with public sector responses which were more likely to focus on GBV and not unpaid care (although had limited interventions for both).

One company identified that women encountered heightened negative impacts from stress and greater risk of violence during the pandemic. They worked with a local partner to train up health workers to respond to the risks of GBV and stress on women who worked on commercial farms in one of their value chains. This was in response to GBV risks raised by their partner organisation, highlighting the importance of real time information from people with a clear understanding of challenges faced by women. However, the scale of this work is small, and they have only trained 200 people to date (186 women).

Another company who had committed to a programme to prevent GBV before the pandemic, continued the work but shifted the focus to the community instead of in the workplace when factories closed. They reported that this programme was already planned and had not got any other initiatives or programmes in place to support the specific needs of women workers.

The desk research identified examples of companies setting up specific support to women employees affected by GBV. Avon launched their GBV protocol (Avon, 2021) which includes additional HR support and global ambassadors to signpost women to professional support. Despite being targeted at employees in a multi-national, these approaches could be used by businesses employing women throughout the value chain. The desk review also identified examples of companies adapting programmes to continue to support women remotely during COVID-19, for example GAP's PACE programme shifted from in-person delivery to women in workplaces and communities to digital learning videos to provide life-skills training to women in 16 countries.

Overall, there is limited evidence available on how companies have integrated gender into their COVID-19 response. This both highlights the need for further intelligence on company responses and also highlights the risk that gender equality and women's economic empowerment is not a key priority for business in times of crisis. The Gender Benchmark report (World Benchmarking Alliance, 2021) reported that companies that scored higher on their gender benchmark also had better results in the Gender Benchmark study on companies' responses to overall human rights risks during the pandemic. If companies already had mechanisms in place to protect and empower women prior to the pandemic, they had a better response to the pandemic, for example being able to quickly adapt to the needs of women during a crisis.

This highlights the importance of companies having strong gender policies, systems and decision-making frameworks that can be adapted in times of crisis rather than setting up brand new approaches or programmes when time and funding is critical. The limited evidence also suggests that companies are not focussing on safeguarding women's employment or supporting their return to work despite this being an area of critical concern. However, there is a growing number of companies releasing gender strategies and some commitment to gathering better data, for example in the food sector some retailers have committed to track the gender profile of high-risk food supply chains (Oxfam 2021) which may provide early indications of risks to women workers and enable responses to support their employment.

Reflections and lessons learned

All companies interviewed reported that, in the initial waves of COVID-19, the needs faced by women were not adequately understood nor addressed. They reported this was due to lack of knowledge and the speed needed to make decisions. It may highlight the lack of incentives for businesses to focus on gender during crises when other areas such as business continuity are prioritised, and the gender impact not understood by decision makers.

One company reported that COVID-19 had highlighted for them the vulnerability and risks for workers in their value chain, the importance of barriers such as unpaid care for women and the macro level challenges such as lack of social protection which left many workers and producers vulnerable. This was particularly stark for them when they compared it to the social protection measurements available in their country of origin. They reported that financial resilience for workers was now a key pillar of their sustainability plan.

A second company reported that they recognised the specific impact of the pandemic on women may have future impacts for their supply chain, for example the rise in teenage pregnancies limiting the number of women entering the workforce, but they had not yet identified potential strategies to address some of these risks for women's full access to and participation in their value chain.

Two companies highlighted the importance of partnerships in helping them respond to the pandemic. This included local implementing partners and supply chain partners stressing the importance of having networks and structures in place to be able to respond and adapt quickly during a crisis. They

also showed the importance of supporting a resilient value chain during the crisis and the recognition of the importance of workers, including female workers, to supporting continuous supply.

One common thread in the companies' responses was how they hope COVID-19 can provide the information and tools to help them respond to future crises such as the climate crisis. One company said they are not well equipped to deal with such huge change. Another company reported that they hope COVID-19 will help the industry better understand and respond to the connection between people and climate change. They hope they can learn from COVID-19 to ensure that people are better protected in crises and that value chains are more resilient.

Company recommendations for FCDO

Two of the three companies interviewed shared their recommendations for how FCDO can support companies to address challenges to women's economic empowerment within their value chain. Both companies were aligned in their key requests on how FCDO can support business respond, namely:

Convening

Companies reported they valued the role of FCDO in bringing together companies around a specific issue in a pre-competitive space. One respondent also commented that in order to do this, they would value more regular interaction with FCDO, so they better understood the challenges that businesses are facing and the contexts they operate in. One key area raised by companies was the climate crisis and how FCDO can convene companies to discuss what they see as the next big crisis that they cannot adapt to without support. One company also highlighted that FCDO plays an important role in bringing non-traditional partners together such as business with academic institutions.

Funding

Companies also reported valuing the role that FCDO can play in scaling up models or unlocking funding within businesses through match funding initiatives. One company reported they have models that they believe have potential, but they don't have the funds or support to scale them throughout their value chain.

Influencing

Companies also reported they would value much more support from FCDO in influencing governments in sourcing and production countries on human rights and women's economic empowerment. Examples included driving the agenda on human rights in value chains or advocating on key issues that have been highlighted during the covid pandemic such as social insurance.

4. Conclusions and recommendations

This report highlighted the limited evidence available on company's gendered responses to COVID-19 recovery and suggests there is a substantial gap between the need to support women's economic recovery and sufficient investment and action by companies for women. Gender does not yet appear to be mainstreamed into business decision making.

The report highlights firstly that companies delivered a wide range of initiatives to support people in their value chains to respond to the onset of COVID-19. Some of these activities went beyond

companies' usual support to the women and men working in their value chains, for example the provision of health and food supplies reflecting the broad impact of the COVID-19 health pandemic and the shift in what the role of a responsible business should be in times of crisis. However, despite increasing calls by civil society organisations that COVID-19 disproportionately impacted women, gender was not initially a key priority for many companies during rapid decision making in the early days of the pandemic. In addition, actions more closely tied with a company's business model that could have the potential to benefit workers including women workers, only came about after public pressure (such as garment companies honouring orders).

The report also highlights a gender data gap as companies did not immediately gather information on the needs of women in specific value chains and in some cases gathered data months or up to a year after the start of the pandemic. This gender data gap was exacerbated by lack of mechanisms pre-pandemic to ensure the needs and voices of women in their supply chains are heard and acted upon. This lack of data hampers business responses as it takes time and resource to gather information and pivot initiatives. Where companies did gather data, they did this through partnerships and supply chain partners already in place showing the importance of having clear networks and mechanisms in place.

The report also showed that initiatives to specifically support women in value chains were often small-scale and focussed on barriers to WEE such as GBV and access to finance and were less likely to focus on job and livelihood protection for women.

Finally, the report provided feedback from companies on how they can better respond in the future and how FCDO can support them in this journey. They called out for support on convening companies on key WEE issues, funding proven initiatives to scale and using donor power to influence governments on relevant policy.

Below we provide recommendations for FCDO based on four headings – champion, convene, fund and influence.

Champion

- Prioritise working with business on embedding WEE into covid recovery and their climate change plans
 - Recognise and publicise the need for companies to take action on WEE during COVID-19 recovery and as part of their net zero/climate change interventions to stem long-term repercussions on women's role in labour and producer markets and the resilience of global value chains. Support mechanisms so that businesses can be held accountable and are recognised for actions taken to support women.
 - Embed WEE and gender as primary outcomes into all economic development programming in key value chains to enable resilient value chains that support gender equality in times of crisis

Convene

- Convene business on WEE priority areas to support collective action on industry wide issues.
 - Support industry to develop sector wide mechanisms to understand gender related risks and gather gender-disaggregated data. May include ongoing platforms as well as mechanisms for rapid data gathering during times of crisis and gathering insights from hidden women workers in "feminised" value chains like informal workers and unrecognised labour.

- Convene companies on shared structural barriers to women's economic empowerment as highlighted by the pandemic. This includes topics such as GBV or unpaid care which require changes to policy, practice, grievance mechanisms, protection and social norms change.

Fund

- Support industry-wide change through funding scalable solutions to key barriers to women's economic empowerment and that encourage pre-competitive collaboration between companies that face similar challenges to progressing on WEE.
- Provide funding to support social dialogue and women's voice in key value chains. This may include funding for women's rights organisations and women-led unions that represent women workers and producers, to engage in dialogue with value chain actors and influence business policy and practice to benefit women members.
- Fund work on climate and WEE to ensure that gender is integrated from the beginning in company planning for the climate crisis including supporting women workers during a 'just transition'.

Influence

- Work with business to collectively influence governments to drive policy changes that directly impact women worker and producers including enhanced social protection for workers including informal workers and human rights legislation.

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