

# Gendered Impacts of Globalization

## *Employment and Social Protection*

*Shahra Razavi, Camilla Arza, Elissa Braunstein,  
Sarah Cook and Kristine Goulding*



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This United Nations Research Institute for Social Development (UNRISD) Programme Paper has been produced with support from the UK Department for International Development (DFID). UNRISD also thanks the governments of Denmark, Finland, Mexico, South Africa, Sweden and the United Kingdom for their core funding.. UNRISD also thanks the governments of Denmark, Finland, Mexico, Sweden, Switzerland and the United Kingdom for their core funding.

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## Acronyms

<b>AIDS</b>	Acquired immunodeficiency syndrome
<b>CASE</b>	Community Agency for Social Enquiry
<b>CCT</b>	Conditional cash transfer
<b>CGT</b>	Confederación General del Trabajo ( <i>Trade union confederation</i> )
<b>CSG</b>	Child Support Grant
<b>CSR</b>	Corporate social responsibility
<b>CTA</b>	Congress of Argentine Workers
<b>Dfid</b>	UK Department for International Development
<b>ECD</b>	Early Childhood Development
<b>EPWP</b>	Expanded Public Works Programme
<b>ETI</b>	Ethical Trading Initiative
<b>FDI</b>	Foreign direct investment
<b>GDP</b>	Gross domestic product
<b>HBC</b>	Home-Based Care
<b>HCBC</b>	Home/Community-Based Care
<b>HIV</b>	Human immunodeficiency virus
<b>HVA</b>	High-value agricultural exports
<b>IDS</b>	Institute of Development Studies
<b>IFA</b>	International Framework Agreement
<b>IFPRI</b>	International Food Policy Research Institute
<b>ILO</b>	International Labour Office
<b>IMF</b>	International Monetary Fund
<b>IUF</b>	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
<b>KWTU</b>	Korea Women's Trade Union
<b>KWWUA</b>	Korean Women Workers' Association United
<b>MBO</b>	Member-based organization
<b>MENA</b>	Middle East and North Africa
<b>MFA</b>	Multi-Fibre Agreement
<b>NGO</b>	Non-governmental organization
<b>NPO</b>	Non-profit organizations
<b>NREGP</b>	National Rural Employment Guarantee Programme
<b>NTAE</b>	Non-traditional agricultural export crops
<b>OAP</b>	Old Age Pension
<b>OECD</b>	Organisation for Economic Co-operation and Development
<b>PERI</b>	Political Economy Research Institute
<b>PME</b>	Monthly Employment Survey
<b>R</b>	South African Rand
<b>SAR</b>	Special Administrative Region (China)
<b>SEWA</b>	Self-Employed Women's Association
<b>SNA</b>	System of national accounts
<b>SOE</b>	State-owned enterprise
<b>TLA</b>	Textile Labour Association
<b>TNC</b>	Transnational corporation
<b>UK</b>	United Kingdom
<b>UNCTAD</b>	United Nations Conference on Trade and Development
<b>UNDP</b>	United Nations Development Programme
<b>UNIDO</b>	United Nations Industrial Development Organization
<b>UNIFEM</b>	United Nations Development Fund for Women
<b>UNRISD</b>	United Nations Research Institute for Social Development

<b>UPEU</b>	Uganda Public Employees Union
<b>US</b>	United States
<b>UWEA</b>	Uganda Workers' Education Association
<b>WIEGO</b>	Women in the Informal Economy Globalizing and Organizing
<b>WTO</b>	World Trade Organization
<b>WWW</b>	Women Working Worldwide



## **Preface and Acknowledgements**

This paper was commissioned by the UK Department for International Development (Dfid) as an independent piece of research with the aim of feeding into the *2012 World Development Report* on gender equality, and informing Dfid's own programming.

It examines how globalization affects gendered access to employment and social protection, with a particular focus on informal employment, and the implications of these connections for policy and practice. For its evidence base, the paper draws on an extensive body of literature, including some of UNRISD's own commissioned research. In addition, two review papers were specifically commissioned as inputs, one on macroeconomic policies and their implications for gender equality (Braunstein 2012) and the other on the gender implications of pension reform in Latin America (Arza 2012). Two shorter literature reviews, on public employment programmes and on informal workers' organizations, were prepared in-house (Goulding 2011a, 2011b). We are grateful to Megan Gerecke (independent consultant) for bringing together data sources and compiling many of the figures and tables, and to Peroline Ainsworth (independent consultant) for her work on the overview.

Useful comments on earlier drafts were provided by Debbie Budlender, Liz Fajber and her team, Peter Utting, and two anonymous referees. The present version reflects the collective work of the UNRISD team.



## **Executive Summary**

### ***Introduction***

The last three decades have seen remarkable changes in economic structures and policies both within and across countries, loosely captured by the term globalization. This paper reviews evidence on how key aspects of globalization processes have impacted the real economy, in terms of employment and social conditions of work for women and men across a wide range of countries.

### ***Trends in women's employment***

Globalization has coincided with a global increase in female labour force participation rates which has narrowed the gender gap from 32 to 26 percentage points. A number of factors associated with globalization processes have contributed to this increase, including the growth of production for export in the developing world. With labour costs such a crucial part of international competitiveness, labour-intensive exporters have shown a preference for women workers because their wages are typically lower than men's and because women are perceived as more productive in these types of jobs.

The narrowing of the gender gap in economic participation rates has not produced commensurate gender equality in pay and status. In fact, increasing female labour force participation has coincided with an increase in informal and unprotected forms of work. Jobs in export-oriented manufacturing firms and capitalist farms producing horticultural export crops have benefited some women, giving them their first discretionary income or a greater say in the allocation of household resources. However, even in the countries where production for export has created new forms of employment, occupational segregation has been maintained: the wages and conditions of work remain far from satisfactory for women who continue to be concentrated in temporary and seasonal jobs, while the few permanent jobs that are created are reserved for men.

### ***Constraints to improved labour market outcomes for women***

#### Labour markets as gendered institutions

Labour markets do not operate in a vacuum. As *social* institutions they are shaped by social norms and power inequalities. Women and men do not come to the market with the same resources, be it working capital, labour (of others), social contacts and different types of skills and experiences. These differences are themselves often the outcomes of gender-based barriers and inequalities.

Both the formal rules and the informal practices that structure the operation of labour markets often reflect the gender norms of the societies in which they are embedded. Women and men tend to have access to, or are deemed appropriate for, different kinds of jobs. Payment and promotion systems, no matter how well codified, always have scope for discretion. The cultural acceptability of paid work—especially outside the home—the varying effects of women's life course and the status of their households all affect women's experiences of paid work. Women are also more likely than men to experience constraints on how they dispose of their earnings, and more likely to be restricted in their labour market activities by their socially ascribed responsibilities for unpaid domestic and care work. Hence, women's increased participation in the labour force is not a straightforward story of progress in gender equality. Moreover, many of the factors that structure labour markets and women's position within them are in turn shaped by broader policies and processes of social change.

### ***Policies associated with globalization***

Patterns of economic growth differ in their ability to generate employment of sufficient quantity and quality. This, in turn, shapes women's (as well as men's) prospects of finding work that provides good terms and conditions. There are concerns that macroeconomic policies that have been dominant over the past three decades have performed poorly in terms of generating sufficient employment that is of decent quality, that is, governed by statutory labour market regulations and/or basic legal and social protections.

**Financial liberalization:** Neoliberal monetary policies have emphasized the opening up of capital markets to external flows and keeping inflation rates low. Financial volatility and crisis in developing countries have had significant effects on the real economy, not only income decline, but also include lower employment, increasing unemployment and underemployment, and apparent shifts of workers from formal to informal labour relations. Recurring economic crises associated with financial liberalization have propelled many women into the labour force, and often into the more precarious forms of work.

**Inflation targeting:** Other key elements of the currently dominant "market friendly" monetary regime include the maintenance of price stability and low inflation rates. While very high rates of inflation (above 20 per cent) are harmful for everyone, there is little evidence to justify very low rates of inflation when these restrictive policies adversely impact employment. Emerging evidence suggests that inflation reduction episodes can have a disproportionately negative impact on women's employment: women lose more employment in percentage terms than men when employment contracts, but women do not gain employment faster than men in the fewer cases where employment expands during inflation reduction episodes.

**Trade liberalization:** Although creating employment opportunities for women in some contexts, trade liberalization has also generated adverse impacts on employment in sectors that have to compete with cheap imports. In most countries the expansion of employment in export-oriented sectors has been more than offset by decline in other sectors of manufacturing that have been hit by import competition. The effect of trade liberalization on growth and employment is contingent on a number of specific policy, country and industry circumstances, including, most importantly, the manner in which policy restrictions on imports can limit the potentially negative effects of import penetration. In addition, the increase in the number of countries expanding their exports of labour-intensive manufacturing commodities has contributed to driving down the relative prices ("terms of trade") of those goods on the global market. This has constrained the types of improvements in wages and working conditions that could have been made. This dynamic is especially damaging for women who tend to be concentrated in the types of industries that are most exposed to international competition. In countries where manufacturing industries have upgraded their products to escape the adverse terms of trade, it has been difficult for women to maintain their jobs. In the Republic of Korea and Taiwan Province of China, for example, the shift to more sophisticated electronics industries has led to a "de-feminization" of the manufacturing sector.

**Public sector reforms:** Down-sizing and privatizing of the public sector has had adverse implications for women who constitute a significant share of public sector workers in many countries (usually higher than their overall share of the work force). Moreover, public sector employment is significant for women because it makes up a larger share of women's formal employment than men's, and because it sets the floor for wages and improves the bargaining power of workers in other contexts.

Mechanisms underpinning the growth of casual and informal employment are therefore likely to have their origins in the structural trends and policies associated with globalization: the idea that labour market informality has grown as a response to government over-regulation does not stand up to scrutiny given the fact that informality has increased at a time when pro-labour statutory regulation has weakened in most countries.

### ***Policies and practices to improve labour market outcomes for women***

**Social protection** policies and programmes aim to address workers' living standards and economic security. Access to social protection mechanisms such as insurance for health and maternity has been high on the agenda of trade unions and women's organizations. However, the way in which some social protection measures are designed and implemented can obstruct women's access to them. This is especially the case with social insurance type of programmes that are closely tied to formal employment: by assuming full-time, formal, life-long employment as the norm, such programmes implicitly discriminate against women. It is possible, however, to make social insurance programmes more inclusive of women (who may be self-employed) by making affiliation mandatory and by partially subsidizing their contributions. Pension programmes can also be made more inclusive by creating or strengthening a government-financed solidarity pillar to enhance the pensions of workers with some contributions but low pensions, as well as through non-contributory social assistance pensions.

Improvements in social insurance design and financing need to be accompanied by efforts to strengthen labour market regulations and social provisions to create a more level playing field for women within labour markets. This includes labour market regulations, for example on minimum wage or elimination of discriminatory wages. It also includes putting in place proactive social provisions such as good quality and accessible care services that can give women the option of engaging in paid work.

Social assistance programmes such as cash transfer schemes targeted to women (on behalf of their children), which have extended their reach in many countries and attracted policy interest in recent years, can be another useful component of a social protection strategy. While cash transfers can enhance children's access to public services, the quality of those services needs improvement through adequate state funding and regulation. There are also concerns about the conditionalities that are attached to some schemes that require unpaid work from time-pressed mothers. Most importantly, social assistance programmes such as cash transfer schemes should be seen as one component of a much broader set of social protection instruments. The larger question is what specific importance to give to this single policy instrument in an overall strategy of development and gender equality.

### ***Toward a broader development agenda that enhances gender equality***

The orthodox policy approach of tight monetary and fiscal policies, and free trade and capital flows, has not proved to be conducive for either widespread development or extensive improvements in well-being and gender equality. There is growing support for alternative macroeconomic policies that, while aiming for macroeconomic stability, take more heed of development and social goals. This would have to include monetary and fiscal policies that are more expansionary, taxation policies that provide governments with adequate revenues to fund social expenditures. If economic growth is to be broadly shared, it is necessary to introduce a set of labour market policies and related interventions that can affect working conditions in diverse employment situations. These should not only enhance the capabilities of workers to capture some of the productivity gains that are now siphoned off into profits, but also rectify gender imbalances and discriminatory practices. Second, if gender inequalities in labour markets are to be rectified, society as a whole has to seek specific means of both progressing toward a better balance between the provision of unpaid reproductive work and paid labour, and facilitating greater gender equality in both domains. For many developing countries, attaining gender equality requires strengthening publicly accountable systems of mutual assurance against entitlement failure. This means investing in well-functioning and accessible public health, education and care services that can also become a source of decent employment; broad-based and redistributive social insurance programmes; and public provision of a range of complementary goods and services such as clean water, subsidized food items, sanitation, electricity, transport and housing.



## Overview

The paper summarized here was commissioned by the UK Department for International Development (Dfid) to analyse:

- how globalization affects access to employment and employment outcomes by gender;
- the constraints to improved economic and social outcomes for women;
- the effectiveness and limitations of policies and practices designed to overcome constraints and improve women's labour market outcomes, and
- identify evidence gaps and critical issues for further research, and key recommendations for policy and practice.

It reviews available evidence on the interconnections between policies associated with globalization on the one hand, and gender structures within labour markets and systems of social protection, on the other.

*Processes of globalization have coincided with women's increasing labour force participation, with empowering consequences for some. This increase is in part a result of the creation of new employment opportunities in production for export following the liberalization of international trade as part of the globalization agenda. However, the increasing participation of women in the labour force should not be read as a straightforward story of progress. Globalization policies have also produced adverse outcomes for significant numbers of women (and men). Crisis-induced disruptions to household income associated with financial liberalization, and job losses linked to competition from cheap imports and public sector reforms are pushing many women into low-paid temporary, seasonal and casual employment. As informal workers, many women have limited access to social protection measures. Structural conditions in global production chains where women workers are concentrated have made it difficult to see improvements in wages and working conditions. Moreover, labour markets remain highly segmented by gender throughout the world, and pay gaps between men and women, though reduced, are significant even in the countries of the Organisation for Economic Co-operation and Development (OECD). Women continue to be primarily responsible for unpaid care and reproductive work, indispensable to the functioning of the "productive economy", despite doing more hours of paid work.*

### **Introduction**

Globalization refers to the deepening of international economic relations, which has accelerated since the 1980s, and is associated with greater economic liberalization both internationally and within national economies (Jomo 2003). This paper focuses on key aspects of these processes, which have had direct or indirect impacts on labour markets: the liberalization of trade and finance; deflationary monetary and fiscal policies; privatization of state-owned enterprises and the introduction of market principles in the public sector; and labour market liberalization. It reviews evidence on how these processes have impacted women differently from men and why. The paper draws heavily on research by feminist economists and social policy analysts published in leading academic journals, as well as global data sources and evaluations produced by relevant multilateral policy organizations (such as the International Labour Organization/ILO, World Bank and the OECD).

### **Box I: A few definitions**

*Employment* is usually defined as work in activities that produce goods and services that are valued and included in the system of national accounts— that is, those economic activities that are officially counted as part of an economy's gross domestic product (GDP). Such market-based exchanges can take many different forms and are not confined to situations where individuals exchange their labour directly for a salary or a wage. Those who are self-employed— whether farming their own land, working in a family-run enterprise or working as street vendors—engage in other forms of market transaction to realize the value of their labour. In practice, not all of these exchanges are consistently captured and counted in labour force surveys and calculations of GDP.

*Unpaid care and reproductive work*—crucial to the success of the productive economy—is not recognized in official labour market statistics nor is it counted as part of GDP. This paper, however, adopts a broad definition of work which includes unpaid domestic and care work.

*Formal employment* refers to work in activities that produce goods and services that are valued and included in the system of national accounts, and governed by statutory labour market regulations and/or basic legal and social protections.

*Informal employment* captures employment in unregulated jobs without any form of protection (such as job security or social security). This definition includes workers in informal enterprises, and workers without any form of social protection elsewhere in the economy, including within the formal sector.

*Unpaid care work* includes housework (meal preparation, cleaning) and care of persons (bathing a child, watching over a frail elderly person) carried out in homes and communities. Such work contributes to well-being and feeds into economic growth through the reproduction of a labour force that is fit, productive and capable of learning and creativity. Women perform the bulk of unpaid domestic and care work across all economies and cultures. Despite its economic value, unpaid domestic and care work is not included in labour force surveys. Nor is it brought into the calculation of GDP. It is therefore invisible in representations of the economy that inform policy making.

### ***Globalization and its gendered employment outcomes: Some facts***

***Processes of globalization have coincided with a global increase in female labour force participation rates; this is in part due to the growing significance of international trade.***

Female labour force participation across the world increased from 50.2 per cent in 1980 to 51.7 per cent in 2008, despite declines in Eastern and Central Europe and Central Asia. As a result, the gender gap in labour force participation rates narrowed from 32 to 26 percentage points (ILO 2010a).

In most advanced industrialized countries, the gap between male and female labour force participation rates has narrowed in the last 30 years. Significant variations in women's labour force participation remain, however, with high rates of around 60 per cent in Nordic countries and relatively low rates of around 40 per cent in Southern Europe. Latin America, Middle East and North Africa (MENA) and sub-Saharan Africa have also seen relative increases in women's labour force participation rates, though some regions, notably MENA, started from a very low base.

A number of factors have contributed to the increase in women's labour force participation rates. The tremendous growth in manufacturing trade and export processing from the developing world underlies the nearly universal increase in women's share of the nonagricultural labour force among high growth or semi-industrialized developing economies in the past few decades.<sup>1</sup> Increases in women's employment have also occurred among producers of non-traditional agricultural export crops (NTAE), such as designer fruits and vegetables or cut flowers, in some countries of sub-Saharan Africa and Central America (Dolan and Sorby 2003), as well as in countries engaged in the more traditionally feminine aspects of the services trade, such as data entry. The relative increase in demand for female labour is not just a matter of expanding the available labour force when male labour is in short supply. With labour costs such a crucial part of international competitiveness in these industries, labour intensive exporters prefer to hire women because women's wages are typically lower than

<sup>1</sup> Berik and Rodgers 2009; Standing 1999; UN 1999.



men's, and because employers perceive women as more productive in these types of jobs (Elson and Pearson 1981).

***For some women participation in the labour market has represented a pathway for empowerment.***

In addition to the growing demand for female labour, other factors, such as the rising levels of female education, falling fertility rates and changing aspirations, have also contributed to the growing tendency by women to seek paid work (UNRISD 2005). In some contexts, such as the garment industry in Bangladesh, increased production for export markets has offered employment opportunities for women previously confined to home-based forms of economic activity (Kabeer 1995). In other contexts, for example horticultural production in Uganda, wage work in flower plantations has provided one of the few sources of off-farm employment (and income) to women, even though the wages may be low relative to their cost of living and compared to what managers on the same farms earn (UWEA 2011). However, increased participation of women in the labour force is not a straightforward story of progress.

***Economic crises, sometimes associated with financial liberalization, have pushed significant numbers of women to look for work on unfavourable terms.***

There is evidence that many women are propelled into the labour market at times of economic distress to make up for falling earnings of other household members, especially male breadwinners. Many of these women take up low-paid casual employment. This has been the case in Latin American countries such as Mexico and Argentina, which have endured recurrent economic crises since the early 1980s, and partly explains the large increase in female labour force participation in that region since 1980 (Cerrutti 2000; Gonzalez de la Rocha 1988). Similarly in post-apartheid South Africa, unemployment among men seems to have led to greater labour force participation among women (Casale 2003, cited in Heintz and Lund 2011). Studies of women wage workers in the NTAE sector in Latin America have also found increasing numbers of women joining the highly mobile seasonal workers in the context of increasing landlessness and livelihood insecurity (Deere 2005).

Economic pressures have also pushed many women (some of them highly educated and qualified) to migrate to find work, sometimes leaving their own children behind in order to take care of children and the elderly in richer countries. Women—both high-skilled and “unskilled”—constitute an increasing proportion of cross-border labour flows (Piper 2008). Such strategies in response to economic distress have become more common with the increasing frequency of financial and economic crises in recent decades.

***More women are entering the work force, but occupational segregation and pay gaps between men and women remain high.***

Despite some improvements in the 1990s, levels of gender segregation<sup>2</sup> in the labour market remain significant throughout the world (Anker et al. 2003). The average shortfall of women's earnings compared to men's was 22.9 per cent during the period 2008–2009, an improvement on the 26.2 per cent gap observed in 1995. Nonetheless at the current pace of progress it would take more than 75 years to reach “equal remuneration for work of equal value” (ILO 2011a:15).

In OECD countries, women are still more likely to be in part-time employment. Moreover, across OECD countries median wages for men are higher than those for women even among full-time employees: in 2004 the average difference was 15 per cent (OECD 2005). In Latin America, women's average income per hour in non-agricultural sectors increased from 68 per

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<sup>2</sup> Occupational sex segregation refers to the separation of women and men into different occupations. This is “one of the most pernicious aspects of inequality in the labour market, since it is generally accompanied by lower pay and worse working conditions in female occupations” (Anker et al. 2003:1). A widely used index for measuring occupation segregation is called the index of dissimilarity.

cent to 78 per cent of men's between 1990 and 2000. In some Asian countries where the gap was wider, there has also been some narrowing, especially in Japan, Malaysia and the Republic of Korea (henceforth South Korea). Despite this trend, men in these Asian countries still earn 40 per cent more than women (ILO 2007:8).

***Increasing female labour force participation has coincided with an increase in informal and unprotected forms of work.***

Over the past three decades tremendous changes have swept through labour markets throughout the world, adversely affecting the security of workers. The growth of informal employment, along with the casualization of formal sector employment, has allowed employers to lower labour costs and to sidestep social security obligations and labour laws. Thus the increase in women's access to paid work has not been associated with a corresponding increase in coverage of employment-related social protection instruments such as maternity leave, health insurance or unemployment insurance. Feminization has therefore happened in a double sense: not only have labour markets included more women, but the convergence between male and female rates of participation has been toward the type of employment patterns historically associated with women (such as insecure and precarious work) (Standing 1999; Beneria 2001).

Existing evidence suggests that in most regions of the world informal employment constitutes a larger proportion of women's total employment than it does of men's total employment.<sup>3</sup> In Brazil, for example, informal non-agricultural employment accounts for 50.3 per cent of women's employment compared to 40 per cent of men's, partly because of the large numbers of women employed as paid domestic workers. In India and Kenya, women dominate agricultural activities which are largely informal. In South Africa, informal non-agricultural employment accounts for 34 per cent of women's employment and 25.5 per cent of men's (Heintz 2008). Other data from South Africa show an increase in women's share of total employment since 1995; informal self-employment and employment as paid domestic workers account for much of this. Evidence from a wide range of countries in Latin America and Africa shows widespread and increasing recruitment of women as temporary contract workers on a seasonal or casual basis in the agricultural sector.<sup>4</sup>

***Women continue to be principally responsible for unpaid care and reproductive work despite doing more hours of paid work.***

Time use data show that in developed countries women spend significantly more time than men on cooking, cleaning and taking care of children (UNDP 2008). When market and non-market based work are taken together, women's total work time exceeds that of men in all but the Nordic countries. Emerging time use data from selected developing countries suggest that the mean time spent by women on unpaid domestic and care work is more than twice the mean time spent by men (Budlender 2008a). While women spend less time on paid work than men, they spend more time working if all types of work (paid and unpaid) are combined. This means less time for leisure, education, political participation and self-care. Women in low-income houses allocate more time to unpaid domestic and care work than women in higher income households, possibly because they cannot purchase care services or time-saving devices, have limited access to social infrastructure like drinking water, and live in larger households. A recent estimate based on six countries, most of them developing, showed that if such work were assigned a monetary value, it would constitute between 10 and 39 per cent of GDP (Budlender 2008a). This work is indispensable to the functioning of the "productive economy"; but labour markets operate in ways that fail to acknowledge the contributions of this "reproductive economy" (Elson 1999). In fact those with reproductive responsibilities are often penalized in terms of earnings and occupations.

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<sup>3</sup> ILO 2002; Chen et al. 2005; UNRISD 2010.

<sup>4</sup> Barrientos and Barrientos 2002; Dolan and Sorby 2003; Deere 2005.

### ***Barriers and constraints to improved labour market outcomes for women***

Why has the increasing demand for female labour not had a more positive impact on women's wages and other employment outcomes vis-à-vis men's, especially at a time when education gaps between women and men have narrowed?

Two key sets of obstacles are discussed: the characteristics of labour markets; and the gendered implications of policies associated with globalization.

How labour markets work: Institutional characteristics and constraints

In the neoclassical worldview labour markets, like any other market, are neutral arenas where buyers and sellers of labour interact. Gender discrimination is acknowledged to exist in labour markets if gender differences in earnings/wages cannot be "accounted for" by differences in education or on-the-job training (Elson 1999). According to this thinking, liberalizing labour markets and allowing greater competition among firms would reduce discrimination against women workers as employers come to realize the costs of discrimination. Likewise, increasing demand for female labour relative to male labour should, in theory, help reduce gender wage gaps.

Labour markets, however, do not operate in a vacuum. As *social* institutions they are shaped by social norms and power inequalities:

- i. women and men do not come to the market with the same material or social resources;
- ii. both formal rules and informal practices that structure the operation of labour markets are themselves often a reflection of gender relations in society within which markets are embedded; and
- iii. men and women have very different roles and relationships to the unpaid "reproductive sector" which shapes their access to labour markets.

Women tend to have less access to capital, contacts, labour and other resources than men and often come to the labour market with different types of skills and experiences. These differences are themselves very often the outcome of structural and discriminatory forces, such as fewer years of labour market experience due to care-related interruptions in paid work.

Both the formal rules and the informal practices that structure the operation of labour markets often reflect the gender norms of the societies in which they are embedded. Men and women therefore have access to (or are deemed appropriate for) different kinds of jobs. Payment and promotion systems, no matter how well codified, always have scope for discretion: performance-related payment systems, for example, seem to apply different criteria of good performance to women and men even within the same job. Occupations which are predominantly undertaken by women tend to have grading systems that compress jobs into a narrow range of grades offering fewer opportunities for promotion (Elson 1999). Furthermore, labour markets fail to acknowledge the contribution of unpaid reproductive work to the economy. For these reasons, gender based hierarchies and segmentations may persist even as the demand for female labour increases, and gaps in educational attainment shrink.

At the same time differences in the cultural acceptability of paid work, especially when it takes place outside the home, the varying effects of women's life course, and the status of their households shape women's experiences of paid work, whether formal or informal. Women are more likely than men to experience constraints on how they dispose of their earnings. Married women often make concessions in their private lives in return for permission to take up paid work: sometimes handing over wages to their husbands. Very often they put in long hours of unpaid work to ensure the fulfilment of what are defined as their primary responsibilities (Kabeer 2007). Paid work does not therefore automatically translate into greater decision-making power, control over own earnings, or a reduction in unpaid care responsibilities.

Women are also more likely to be constrained in their labour market activities by their socially ascribed responsibilities for reproductive work. Their employment may be interrupted or reduced, for example when children are very young or a family member is sick. They may have to take up work which offers more flexibility in terms of the physical location or timing of activities (such as informal industrial outwork) but which pays less well. Such constrained choices are likely to have adverse implications for earnings, work-related benefits and old age security.

#### Globalization policies and their gendered consequences

A number of key policy areas are associated with the most recent phase of globalization. These include trade and financial liberalization, deflationary macroeconomic policies, fiscal restraint, privatization, the introduction of market principles (“quasi markets”) into the public sector and labour market liberalization. These do not represent an exhaustive list of the policy channels that link globalization to employment effects, but rather capture the main areas of research to date. Much more remains to be done and understood about this relationship. The analysis of these policies in terms of their gendered implications is also limited. However, existing research suggests ways in which such policies translate into differential outcomes in the areas of employment and social protection, in ways which often disadvantage women.

#### ***The costs of economic volatility and crisis resulting from financial liberalization are not equally shared.***

Financial liberalization is one of the most controversial aspects of globalization due to its association with economic volatility and crises.<sup>5</sup> These have negative effects on the real economy, particularly on incomes and employment, because they increase unemployment and underemployment, and because they can induce a shift of workers from more formal to relatively casualized and informal employment.

Economic crises may affect labour supply in two ways. They may discourage workers and push them out of the labour force completely, or they can induce households to add more workers to the labour market as protection against lower or more volatile household incomes. The added-worker effect dominates explanations of crisis-related increases in labour force participation in Latin America, much of it by women (Cerrutti 2000). Similar work on the gendered employment effects of the Asian financial crisis in 1997–1998, however, showed that in that context women were pushed out of the formal labour market. They were typically the first to be laid off both because they worked in more cyclically volatile firms, such as small export-oriented enterprises, and because of efforts to protect the jobs of “male breadwinners” (UN 1999). In South Korea, women lost jobs at twice the rate of men, despite the fact that before the crisis, their unemployment was half that of men’s (UN 1999).

Both these effects are linked to the shift of workers from formal to informal employment with new labour force entrants and workers who have lost jobs being absorbed into less formal, part-time or casual types of paid work. Women are especially likely to undertake such work in these circumstances. Following the economic crisis in South Korea, fixed-term, contingent, temporary agent and on-call workers grew from 16.6 per cent of total wage and salary employment in 2001 to 28.8 per cent in 2006; non-standard employment accounted for 40.3 per cent of women’s earnings compared to 24.1 per cent of men’s (Grubb et al. 2007). This represented a significant change in the structure of South Korea’s labour market.

The 2008 economic crisis began as a financial crisis in the developed world and reverberated out to developing economies, primarily as a negative trade shock. The substantial decline in export markets beginning in late 2008 reduced employment demand among developing country exporters. Preliminary reports link differences in women’s and men’s unemployment outcomes post-crisis with the industries in which they work, not with discriminatory or male

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<sup>5</sup> Gabel 2011; Van der Hoeven and Lubker 2006; Ocampo 2005; Prasad et al. 2003.

breadwinner bias as in the Asian financial crisis (Hirway and Prabhu 2012; Otobe 2011). For instance, in Ukraine, where the metal processing export industries, which primarily employ men, were hit hard by the collapse in global demand, men's employment declined much more than women's. Conversely, higher proportions of women lost their jobs in Cambodia, Egypt, Mauritius, Morocco and the Philippines, largely because of job losses in the textile and clothing sectors, where women's employment is concentrated.<sup>6</sup> However, evidence on the gender differentiated outcomes of the 2008–2009 crisis remains fragmentary, and in need of more careful quantitative and qualitative assessment.

***Women are more likely than men to lose their jobs during periods of inflation reduction.***

In addition to open capital accounts (financial liberalization) discussed above, key elements of the currently dominant “market friendly” monetary regime include the maintenance of price stability and low inflation rates. While very high rates of inflation (above 20 per cent) are harmful for everyone—including workers whose wages will be eroded if they are not indexed to inflation—there is little evidence to justify maintaining very low rates of inflation (not just in the single digits, but very often less than five per cent), when these restrictive policies adversely impact employment. Inflation targeting, as with monetary policy more broadly, has both a social content and a social impact with distinctive “winners” and “losers” defined in terms of income group and gender. Emerging evidence suggests that inflation reduction episodes can have a disproportionately negative impact on women's employment: women lose more employment in percentage terms than men when employment contracts, but women do not gain employment faster than men in the fewer cases where employment expands during inflation reduction episodes (Braunstein and Heintz 2006). More research is needed to confirm this finding.

***Trade liberalization can have adverse impacts on employment in sectors that have to compete with cheap imports.***

Trade liberalization has received a relatively more positive assessment than financial liberalization because of the presumed employment gains for developing countries, and women in those countries in particular, given their disproportionate share of employment in export-oriented sectors. However, while the growth of the manufacturing sector for export has created employment opportunities for women in some contexts, the liberalization of trade has also engendered negative impacts on jobs in sectors that have to compete with cheap imports. The effect of trade liberalization on growth and employment is thus contingent on a number of specific policy, country, and industry circumstances, including the extent to which domestic production is shielded, through restrictions placed on imports, from the potentially negative effects of import penetration (Heintz 2006). In South Africa, for example, the positive employment effects associated with production for export have been almost entirely offset by the negative consequences of import penetration. This is in contrast to Vietnam and China, which maintained firm restrictions on imports during the rapid growth of their export sectors (Heintz 2006; Ghosh 2003).

In countries where trade liberalization has facilitated the growth of export-oriented NTAE and manufacturing industries, women have made up a significant share of the workforce: around 74 per cent in garments manufacturing, and between 60 and 80 per cent in NTAE. The ability to earn an independent wage may have facilitated personal paths of empowerment for some of these women workers. However, the structural conditions of these global production chains, marked by ever more competitive subcontracting arrangements, have made it very difficult for women workers to see improvements in their wages and working conditions, despite new forms of labour advocacy and regulation. In addition, the increase in the number of countries expanding their exports of (labour-intensive) manufacturing commodities has contributed to

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<sup>6</sup> Otobe 2011; Jansen and von Uexkull 2010; Pearson and Sweetman 2010.

driving down the relative prices (“terms of trade”) of those goods on the global market. This has constrained the types of improvements in wages and working conditions that could have been made (UNCTAD 2007). This dynamic is especially damaging for women who tend to be concentrated in the types of industries that are most exposed to international competition (Berik and Rodgers 2009).

In countries where manufacturing industries have up-graded their products (such as Mexico and South Korea), in order to diversify their export base away from goods that are facing adverse terms of trade, it has been difficult for women to maintain their jobs, leading in some cases to the de-feminization of manufacturing employment (UN 1999).

***Public employment is an important source of formal employment for women but under pressure.***

Governments in many countries, both developing and developed, have been under pressure in recent decades to reduce the size and role of the state. Pressures on governments have come from different sources. One has been the need to raise funds and reduce public subsidies paid to loss-making enterprises in the context of fiscal constraints that were particularly dominant in the 1980s and early 1990s (and are intensifying in the context of the post-2008 crisis). Another contributing factor has been the growing prominence of the idea that a leaner state is also one that is more efficient, bolstered by market-enhancing “governance” reforms of the 1990s which have advocated decentralized management, performance contracts and the contracting out of services (UNRISD 2010: chapter 19).

The privatization of state-owned enterprises and the creation of a leaner, more efficient state have effected women’s and men’s employment differently. It is useful to differentiate between two distinctive effects of changes in public sector employment in the context of reforms: (i) the impact of privatization of state-owned enterprises (SOEs), and (ii) the impact of the decline in the size of the public sector overall (Braunstein 2012).

Since the majority of SOEs are capital-intensive and employ more men, the impact of privatization is likely to affect women’s employment less than men’s (Birdsall and Nellis 2003; Heintz 2006). The down-sizing of the public sector overall, however, is harder on women because they have historically constituted a significant share of public sector workers in many countries, sometimes higher than their overall share of the labour force, and also because public sector employment makes up a larger share of women’s formal employment than men’s. Available ILO data show that women constituted 35 per cent of public employees in developing countries, 46 per cent in transition countries, and 50 per cent in OECD countries (Hammouya 1999). There is also evidence that government employment either declined faster or grew more slowly than private employment in most countries during the 1990s (Hammouya 1999). The reduction in public sector employment has been particularly noticeable in the transition economies of Eastern Europe and Central Asia, which may explain the decrease in female labour participation in this region.

In addition to privatizing many public sector activities, governments have also tried to improve efficiency within the public sector by raising user charges, rationalizing staff time, and outsourcing some services to for-profit or not-for-profit organizations. The latter organizations may not be able to provide decent wages and working conditions to their workforce. In several lower-income countries, the terms and conditions of employment for frontline public sector workers such as nurses in public hospitals have deteriorated as a result (Meena 2010; Mackintosh and Tibandebage 2006).

***Mechanisms underpinning the growth of informal employment are likely to have their origins in the structural trends and policies associated with globalization.***

A number of studies on the growth of casual and informal work make a direct causal link between globalization/liberalization and informalization of employment.<sup>7</sup> In contrast to this explanation, others attribute the growth of labour market informality to government over-regulation—an approach that is commonly associated with the work of Peruvian economist, Hernando de Soto. According to this theory, informalization reflects the attempt by entrepreneurs to escape excessive state regulation. By operating informally, entrepreneurs can free themselves from binding state regulations that are time-consuming and costly.

The over-regulation approach does generate some useful insights into how a regulatory regime can create pressures toward informalization in contexts where labour markets are heavily regulated by the state. But how useful is it for explaining the post-1980 phase of labour market informalization? Evidence from different regions suggests that pro-labour government regulation has been weakening over the past three decades, especially in most developing countries. The incentives for entrepreneurs to circumvent state regulation should therefore also have diminished. Thus the over-regulation approach reinforces the question of why informalization has grown at a time when state regulations of labour markets, and hence the incentives for entrepreneurs to escape them, have been weakening.

The mechanisms underpinning the informalization of the labour market are therefore more likely to have their origins in the kind of structural trends and policies that have been associated with globalization (and explained above). This includes competitive pressures within export-oriented production processes associated with trade and financial liberalization, recurrent economic crises, public sector reforms triggering outsourcing and the decline in the bargaining power of organized labour.

### ***Policies and practices to improve labour market outcomes for women***

While evidence shows an increase in women's participation in the labour force globally, we have also seen that women are not always able to reap the benefits of such work. Employment does not always lead to better social and economic outcomes. What kinds of policies and practices have been used to mitigate adverse outcomes and ensure that opportunities for employment more positively impact all women? This paper reviews two sets of policies and practices that address the adverse economic and social conditions within which large sections of the population, including many workers and their dependents, find themselves: first, social protection mechanisms that are concerned with preventing, managing and overcoming situations that adversely affect people's well-being; second, new forms of labour regulation involving companies/industries and labour interests.

#### Social Protection

Economic security requires not only earnings/wages, but also social protection mechanisms. Social protection policies and programmes, often implemented by the state, complement labour market policies and aim to address workers' living standards and economic security. The demand for social protection mechanisms such as health and maternity insurance has been high on the agenda of trade unions and women's organizations. In fact, social protection programmes are sometimes put in place by the state in response to the "bottom-up" claims of women workers and other groups of citizens. Social protection programmes should not therefore be seen as simply top-down initiatives.

Broadly speaking there are two types of social protection interventions: social insurance and social assistance (see box II).

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<sup>7</sup> Beneria 2001; Chen et al. 2005; Heintz and Pollin 2003; Standing 1999.

## **Box II: A few more definitions**

*Social protection* is concerned with preventing, managing and overcoming situations that adversely affect people's well-being or living standards. It encompasses policies that protect people from the adverse consequences of illness, disability, maternity and old age; market-risks such as unemployment and price volatilities; and economic crises and natural disasters (UNRISD 2010). Historically, social protection measures have developed in the context of developed countries, where the concern is temporary income shortfalls and transitory poverty in otherwise acceptable living standards (UNRISD 2010). When applied to developing countries where poverty is chronic, there is a need to also address persistently low incomes. In such contexts, social protection must include not only "protection" but also "promotion"—measures that enhance living conditions and address everyday deprivation (Drèze and Sen 1991).

*Social insurance* refers to employment-related programmes financed by contributions from employers and employees based on earnings. Social insurance programmes tend to be accessed through (usually formal) employment.

*Social assistance* provides transfers to people who are unable to work and who are deemed eligible, whether on the basis of their income, their vulnerability status or their rights as citizens.

In the context of global concerns about poverty, policy interest in social assistance programmes (see box II) has grown. Some of these programmes, for example child-centred cash transfer schemes, explicitly target women. In some countries, especially in Latin America, social assistance programmes have significantly expanded their reach in recent years.

***The extent to which social protection measures are inclusive of women depends on how they are designed, financed and implemented.***

This is especially the case with programmes that are tied to formal employment. A number of strategies are needed—and have been tried—to make social protection programmes more gender-equitable.

### Social Insurance

***By assuming full-time, formal, life-long employment as the norm, social insurance programmes implicitly discriminate against women.***

Social insurance programmes tend to be gender-blind, meaning that most of their provisions do not treat women differently from men. Yet by assuming full-time, formal, life-long employment as the norm, such programmes implicitly discriminate against women. While social insurance benefits in many countries (though not all) did not reach beyond a relatively small segment of the population, this segment has become even smaller (relative to the overall population) in the last quarter-century, a consequence of some of the labour market trends described already. This creates a formidable challenge to maintain and expand the coverage of social insurance. Women in particular tend to have lower labour force participation rates, more frequent breaks in employment, higher prevalence of part-time and/or informal work, and lower earnings. They therefore lose out on programmes where benefits (to health or pension) are tied to individual work history. In the case of pensions, for example, in several Latin American countries, the link between labour market trajectories and benefit levels was strengthened during the pension reforms of the 1980s and 1990s. Under the new systems (defined contribution individual accounts), individuals are assumed to save for retirement and virtually no redistribution across individuals takes place in the private pillar. Saving accounts strengthen the link between individual contributions and benefits, making pensions more closely reflect the gender inequalities in labour markets.

Some governments have taken steps to adapt their social insurance programmes to changing labour markets. For example, Costa Rica and South Korea have brought informal workers and the self-employed under the coverage of health insurance programmes by making affiliation mandatory and by partially subsidizing their contributions (Mesa-Lago 2008; Kwon and Tchoe 2005). Since 2000, pension reforms in Latin America have attempted to address the gender biases in their pension systems, by creating or strengthening a government-financed solidarity pillar to enhance the pensions of workers with some contributions but with low pensions (Arza



2012). It is too early, however, to tell how these recent changes are going to affect the number of women eligible for a pension and the size of their benefits.

However, even if some such design features are introduced, they are unlikely to produce equal outcomes in terms of social protection on their own. Many women and men who work informally are likely to remain in a disadvantaged position in terms of social protection as long as social protection benefits are tied, even if loosely, to employment and earnings, and as long as pervasive gender inequalities persist within labour markets. Hence, additional and complementary strategies are also needed:

- developing systems of social protection that are not linked to employment, through **social assistance programmes**;
- strengthening **labour market regulations**, for example enforcing minimum wage legislation or eliminating discriminatory wages; and
- putting in place **pro-active social provisions**, such as public care services, to enhance women's labour market performance.

### Social Assistance

*In the context of global concerns about poverty, policy enthusiasm for targeted social assistance programmes, especially child/family cash transfer schemes, has increased in recent years.*

Unlike the narrowly targeted "safety net" projects of the early 1990s, some of these non-contributory cash transfer schemes (e.g. Bolsa Familia in Brazil) have wide coverage and are better institutionalized within the social protection system. If cash transfer programmes are well-designed and implemented, they can provide recipients, including many women, with a regular and reliable source of income, even though they tend to be small. However, there are a number of serious shortcomings that require policy attention.

First, while cash transfers can enhance poor people's access to public services, the quality of those services needs improvement through adequate state funding and regulation. There are concerns that resources allocated to CCT programmes may mean *less* public investment in public services (Melo 2008; Ghosh 2011). Second, conditionalities attached to some cash transfer programmes that require unpaid work from time-pressed mothers (for example, performing community work in addition to the commitments they have to make to taking their children for health checks and attending workshops) can be harmful, constraining their ability to take up income-earning activities (Molyneux 2007; Chant 2008). Third, family/child benefits tend to be relatively small; increasing the size of such benefits could enhance their effectiveness in reducing poverty.

Most importantly, social assistance programmes such as conditional cash transfers (CCTs) should be seen as one component of a much broader set of social policy instruments and programmes. It is dangerous therefore to reduce social policy to one policy instrument. The broader question is what specific importance to give to this single policy instrument in an overall strategy of development and gender equality.

*Public works programmes represent another form of social assistance often directed at those below a certain level of income. Women often represent a significant share of participants in these programmes.*

Public works programmes are often provided as a temporary measure to cope with the social fallout of natural disasters or deep economic crises. In some cases programme provision is on a permanent basis to guard against adverse employment conditions and promote the right to paid work as a guaranteed entitlement. One such programme is India's National Rural Employment Guarantee Programme (NREGP) which, in principle, guarantees 100 days

employment a year to registered rural households on demand, along with minimum wages, gender parity of wages and provision of basic worksite facilities such as childcare (Kelkar 2009). The beneficiaries of public works programmes are likely to include a significant proportion of people who are either out of the labour force, unemployed, or working informally. Women often represent a significant share of programme participants: in 2010 they comprised 49.5 per cent of NREGP's total employment across India (NREGA 2011). One positive outcome of this particular programme has been its effect in pushing up the wages of women agricultural workers in the vicinity, and reducing the gap between women's actual wages and the minimum wage (Dasgupta and Sudarshan 2011).

Other features that are useful in order to place women's participation in such programmes on a more equal footing include having individual (rather than household) entitlements, the inclusion of work projects that do not require heavy manual labour (such as care work) and the provision of child care facilities.

Enabling social protection: Paid leave and care services

***Access to paid leave and quality care services improves women's capacity to access employment.***

In recent years, governments in many middle-income developing countries have taken significant steps to expand both formal and non-formal or community-based forms of care and preschool education. In several middle-income countries access to preschool (4–5 year olds) has expanded for both rich and poorer households. However, provision of care services for younger age groups (0–3 years) remains limited and unequal across income groups and regions.

One concern about provision of care services is the segmented nature of programmes, where different quality services are used by children from different social/income groups, thereby reinforcing inequalities.

***Care work, a largely female domain, is often associated with poor working conditions, low wages and lack of social protection.***

The second area of concern is about the employment conditions characterizing care work—a largely female domain—such as low wages and lack of social protection, compared to non-care work requiring similar levels of education and training. While care services can become an important source of employment for women while enhancing the capabilities of care recipients, the challenge facing policy is to shift from a strategy that relies on market and voluntary provision of the most informal and exploitative kind, to one that nurtures professional, decently paid and compassionate forms of care; both workers and care recipients are likely to benefit from such a shift (Razavi and Staab 2010).

Practices and mechanisms for workers organizations and bargaining

While traditional trade unions may have lost political influence due to declining membership in recent decades, new forms of political mobilization campaigning for both labour rights and subsistence needs have proliferated. New spaces and forms of activism, strategic alliances and coalitions involving unions, NGOs and campaigning networks in support of labour rights has helped to bolster women's labour market outcomes.

Some traditional unions have opened up membership to informal workers, either to boost their own membership base or to make common cause with informal workers associations through a new "social movement unionism". The Congress of Argentine Workers (one of two national confederations in Argentina) emerged as a left-wing splinter of the traditional trade union confederation, Confederación General del Trabajo (CGT) toward the late 1990s and expanded to include informally employed workers through alliances with neighbourhood organizations (Etchemendy and Collier 2007). Other associations have gained legitimacy under the umbrella

of established traditional unions. Informal workers have also formed unions that cater directly to their needs, sometimes spontaneously and sometimes supported by external actors. The Self-Employed Women's Association (SEWA) of India, for example, had 1,257,000 members throughout India in 2011, representing the single largest informal sector union in the world.

The heterogeneity and dispersion of informal workers creates challenges for the formation and scaling-up of collective action. However these movements have had some success in making informal workers more visible in policy debates and in the way labour force statistics are organized. They have also effected change around specific issues at the local, municipal level—for example, changing urban regulation to facilitate the work of street vendors or in social insurance programmes to cover domestic workers.<sup>8</sup> They have, however, had limited influence on macroeconomic policy at the national level. Some argue that in the context of globalization the policy parameters over which states can exert control (fiscal deficits, import controls) are reduced, or at least there is a change in the policies that can be legitimately contested (Collier and Handlin 2005) through lobbying at the national level.

#### Voluntary standards and codes of conduct

Historically, labour standards have largely been a product of normative frameworks developed by governments, labour unions or the two together. However, with the globalization of production processes, and changing ideas about the role of the state, these frameworks have come under increasing criticism. At the same time, new forms of governance have gained ground, giving a greater role to non-state actors, including both companies/industries and civil society actors.

The limited, top-down and “soft” agenda of private voluntary regulation—which typically involved a few companies and a limited range of issues—has evolved since the early 1990s to encompass more companies/industries, different organizations representing labour interests, and a broader set of issues, including labour rights (Utting 2005). An important part of this process has been the emergence of international “soft laws” intended to guide company practice, such as the “Protect, Respect and Remedy” framework for business and human rights (approved by the Human Rights Council in 2008) or the Women's Empowerment Principles launched by the United Nations Development Fund for Women (UNIFEM, now UNWomen) in 2010. Within these multistakeholder initiatives there is a diversity of types of worker organizing, including trade unions, NGOs and grassroots women worker associations (Hale and Shaw 2001).

However, despite these efforts, lack of information concerning the number, identity and location of suppliers makes extending the monitoring of labour conditions very challenging in practice. Multistakeholder initiatives still involve only a fraction of the world's transnational companies, and where procedures are in place they are often weak, or very top-down and technocratic.

Highly publicized abuses of human rights in production of garments, footwear and other industries have led some businesses to address labour conditions in their supply chains through company or industry-wide codes, such as the Ethical Trading Initiative (ETI). This has had positive impacts on health and safety, minimum wages and employment benefits for regular and permanent workers. However, extending the implementation and monitoring of standards to the large numbers of women who work as temporary and contract workers remains the Achilles heel of corporate codes.<sup>9</sup>

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<sup>8</sup> Hertz 2004 on domestic workers in South Africa, Blofield 2009 on domestic workers in Latin America.

<sup>9</sup> Bain 2010; Barrientos 2008; Barrientos and Smith 2007.

### ***Economic and social policies working in tandem***

The orthodox policy approach of tight monetary and fiscal policies, and free trade and capital flows, has not proved to be conducive for either widespread development or extensive improvements in well-being and in gender equality. There is growing support for alternative macroeconomic policies that, while aiming for macroeconomic stability, take more heed of development and social goals. Changes in policy direction would include monetary and fiscal policies that are more expansionary, taxation policies that provide governments with adequate revenues to fund social expenditures and repair the erosion of the protective capacity of the state, policies that pursue selective strategic liberalization of capital flows and trade, and regulation of capital flows so to avoid excessive volatility in employment and exchange rates. More precisely, trade and foreign direct investment (FDI) policy must serve as a tool of development, rather than to pursue the liberalization of trade and capital flows as ends in themselves. Moreover, a variety of policy measures often referred to as “industrial policy” are essential to promote transition from an economy tied to the vagaries and limitations of over-emphasis on the production and export of commodities and labour-intensive low-value manufactures.

Nevertheless, such changes in macro policy, while more likely to foster growth, development and structural change, are not guaranteed in and of themselves to improve women’s well-being or, more particularly, to promote rapid progress in gender equality. The extent to which economic growth, structural change and technological upgrading expand women’s work opportunities and income-generating capacity depends on two crucial factors.

***First, if economic growth is to be broadly shared, it is necessary to introduce a set of labour market policies and related interventions that can affect working conditions in diverse employment situations.***

These should not only enhance the capabilities of workers to capture some of the gains, but also rectify gender imbalances and discriminatory practices.

***Second, if gender inequalities in labour markets are to be rectified, society as a whole has to seek specific means of both progressing toward a better balance between the provision of unpaid care and paid labour, and facilitating greater gender equality in both domains.***

This remains a challenge even in many advanced industrialized countries. For many developing countries attaining gender equality requires the strengthening of publicly accountable systems of mutual assurance against entitlement failure. This means investing in areas that orthodox prescriptions cannot countenance: well-functioning and accessible public health, public education and public care services that can also become a source of “decent” employment; broad-based and redistributive social insurance programmes; and public provision of a range of complementary goods and services such as clean water, subsidized food items, sanitation, electricity, transport and housing.

## Introduction

This paper was commissioned by the UK Department for International Development (Dfid) to analyse:

- how globalization affects access to employment and employment outcomes by gender;
- the constraints to improved economic and social outcomes for women and;
- the effectiveness and limitations of policies and practices designed to overcome constraints and improve women's labour market outcomes.

Its objective therefore is to review the evidence on the interconnections between globalization on the one hand, and gender structures within labour markets and systems of social protection, on the other. These gender structures, which are central to the analysis presented here, are important factors in shaping women's well-being, capabilities and security. It is for this reason that we see employment and social protection as important fields of enquiry.

The paper begins by providing a broad-brush picture of women's engagement in both paid and unpaid work globally, as well as some comparative data on gender wage gaps, and access to social protection. Section 2 then sets out a conceptual framework for the analysis of work and employment from a gender perspective. These two sections provide the background to the elaboration in section 3 of the economic policy agenda that has become dominant over the past three decades—variously referred to as the liberalization agenda, the neoliberal agenda, or simply globalization—and contributed to some of the observed changes in employment patterns. The discussion of the economic policy agenda in this section is not exhaustive, but looks more specifically at those components that have been better researched and that seem to have more direct implications for employment: trade and financial liberalization, deflationary macroeconomic policies, fiscal restraint, privatization of state-owned enterprises and the introduction of market principles into the public sector. Section 4 qualifies some of the macro analysis provided in the previous section by showing the contested nature of the causal connections between the economic policy agenda and labour market informalization. It also underlines the segmented and heterogeneous nature of informal employment. Section 5 then reviews evidence on the contribution of statutory social protection programmes to women's workers' capabilities and security, and how these programmes relate to employment patterns. The discussion includes pensions, cash transfer schemes, public employment programmes, and care leaves and services. Section 6 turns to the conditions that have shaped the capacity of trade unions, non-governmental organizations (NGOs) and other bodies to organize women workers to demand better working conditions, as well as new forms of regulation (such as voluntary codes of conduct) that seek to improve labour standards. The concluding section draws the paper to a close by highlighting the main findings, identifying some research and evidence gaps, as well as some policy recommendations.

Taken together the analysis in this paper suggests that well-designed social policies can, and very often do, play a critical role in building human capabilities and providing economic and social security, by (re)producing labour and protecting workers and their households from the vagaries of markets and the changing circumstances of age. However, without some rethinking at the macroeconomic policy level and effort to make employment concerns (including its quality) central to how economic policies are forged, the effectiveness of even well-designed social interventions are likely to be stymied. The paper thus concludes by questioning the artificial divide between economic and social policies, and the importance of integrating employment and gender concerns within the macroeconomic policy agenda and development strategies more broadly.

Summaries of each section can be found at the end of the section, shaded in grey.

## **Methodology**

This paper is based on extensive desk-based research. It reviews the relevant literature on globalization, employment, social protection and their gendered content and outcomes. The literature consulted includes relevant academic journals (for example, *Feminist Economics*, *World Development*, *Global Social Policy*); documents, data sources and evaluations by relevant multilateral policy organizations (including the International Labour Organization/ILO, World Bank and the Organisation for Economic Co-operation and Development/OECD); and papers by other policy-relevant research or advocacy institutions (such as the Political Research Institute/PERI and Women in the Informal Economy Globalizing and Organization/WIEGO). Given the centrality of gender to the present paper, the literature review has been biased toward journals with a strong interest in the gender dimensions of economic and social policy, namely *Feminist Economics*, *Social Politics*, *Signs*, and *Global Social Policy*, as well as other publications (such as chapters in edited volumes) by leading feminist economists. Rather than undertaking a systematic review we have carried out the research through an iterative process, moving from the general texts (especially review articles) to the more specialized texts dealing with specific issues (for example, gender wage gaps). In doing the research we have searched journals known for their gender publications, and used snowballing methods.

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## **Data and analysis covered by literature review**

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Multilateral institutions	ILO, World Bank, United Nations Development Programme (UNDP), United Nations Development Fund for Women (UNIFEM), OECD and so on.
Policy-relevant research and advocacy institutions	Political Economy Research Institute (PERI, University of Massachusetts, Amherst), the Institute for Research on Labour and Employment (University of California, Berkeley), the Institute of Development Studies (IDS, University of Sussex), International Food Policy Research Institute (IFPRI), Community Agency for Social Enquiry (CASE), Women in the Informal Economy Globalizing and Organizing (WIEGO) and so on. In-house research by United Research Institute for Social Development (UNRISD)
Academic publications	Peer-reviewed journals including <i>Feminist Economics</i> , <i>World Development</i> , <i>Social Politics</i> , <i>International Labour Review</i> , <i>Politics and Society</i> , <i>Development and Change</i> , <i>Global Social Policy</i> , <i>Signs</i>
Externally-commissioned background papers	External review papers from experts on gender and macroeconomic policy, and gender and pension reform in Latin America

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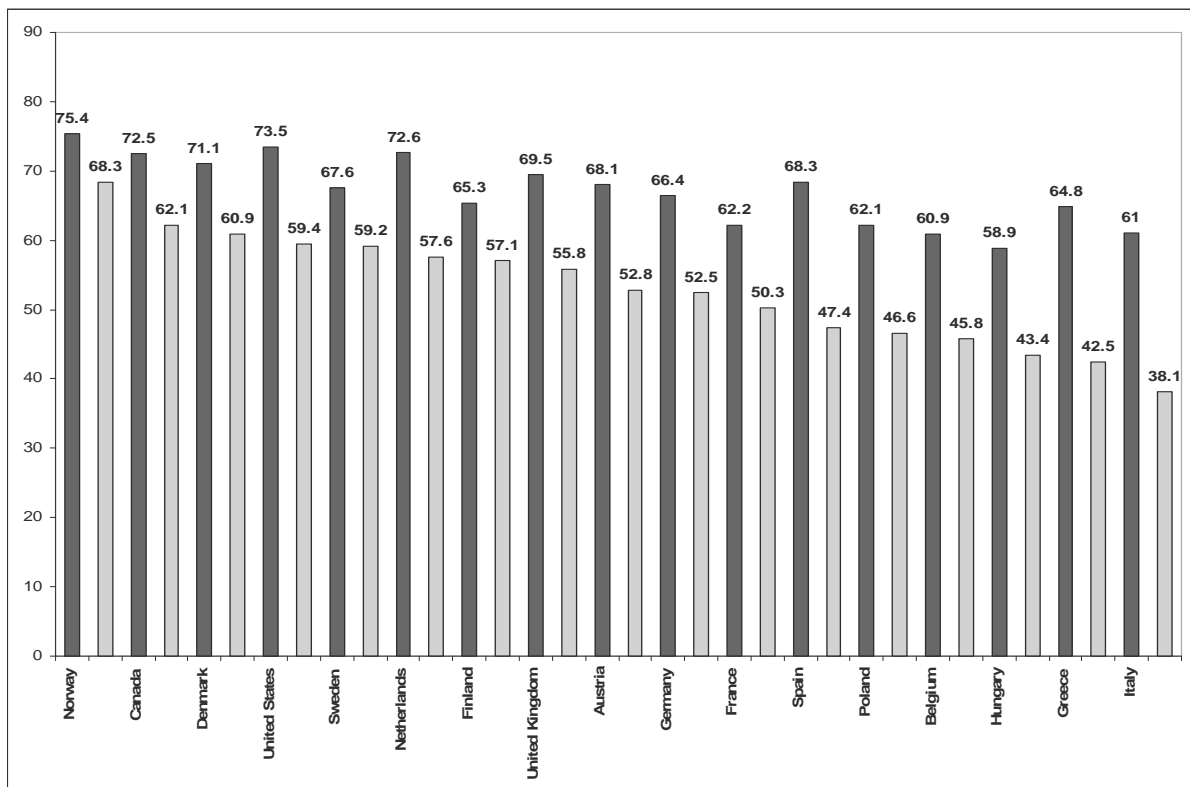
For further details see appendix.

## **1. Women's Increasing Entry into Paid Work: A Rising Tide?**

Women have entered paid work in increasing numbers over recent decades, as this section illustrates. It presents data on: (i) the labour force participation of women relative to men, (ii) gender wage gaps and, (iii) some evidence on unpaid work. As will become clear, data sources on these issues, especially wages and unpaid work, are often patchy, especially for many developing countries. Hence, this section will provide a rough picture for different regions / groups of countries based on available data sources and case studies. While most of the focus in this paper is on the global south, it provides some evidence from the advanced industrialized countries for comparative purposes.

At the aggregate global level, female labour force participation increased from 50.2 to 51.7 per cent between 1980 and 2008, while the male rate decreased slightly from 82.0 to 77.7 per cent over the same period; as a result, the gender gap in labour force participation rates has narrowed from 32 to 26 percentage points (ILO 2010a). In most advanced industrialized countries, the gap between male and female labour force participation has narrowed significantly over the past 30 years as women have entered the workforce in large numbers. However, while men’s rates of participation are high everywhere, the variations in women’s labour market participation across countries are significant: Nordic and Anglophone countries show the highest participation rates by women, while Southern European countries have relatively low rates (see figure 1). Moreover, significant gender inequalities remain beyond simple economic participation rates. Women, for example, are over-represented in part-time employment compared to men in all OECD countries, as men still specialize in full-time paid employment while women do the bulk of unpaid work and adapt their labour market behaviour to the possibility of combining both (OECD 2011; Orloff 2002).

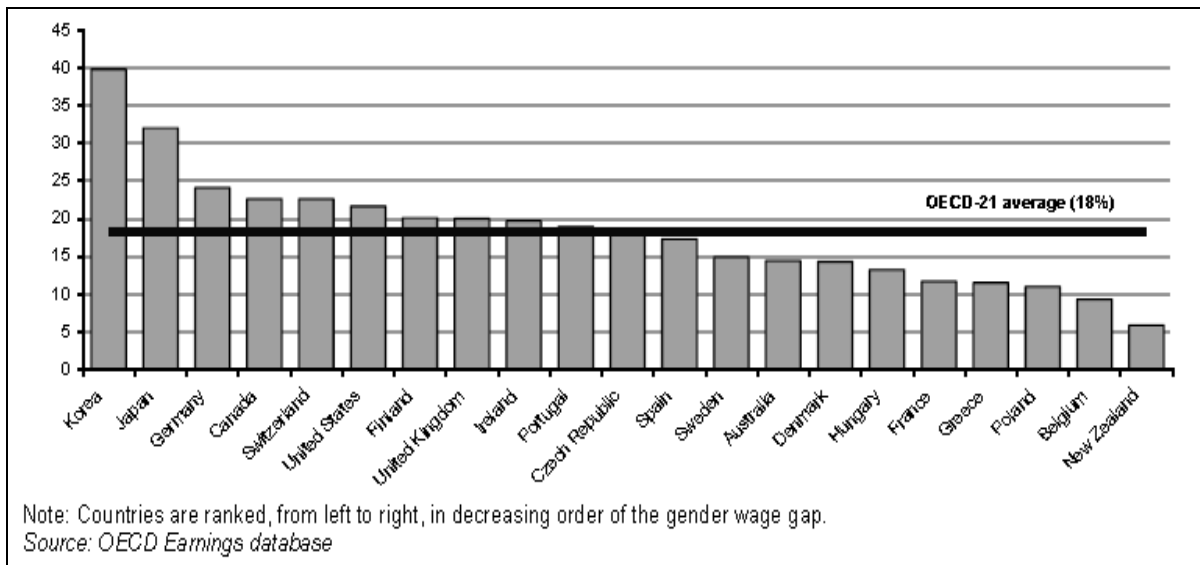
**Figure 1: Labour market participation rates of men and women in selected developed countries, 2006 (age 15+)**



Source: UNECE Statistical Division Database, compiled from national and international (EUROSTAT and ILO) official sources.

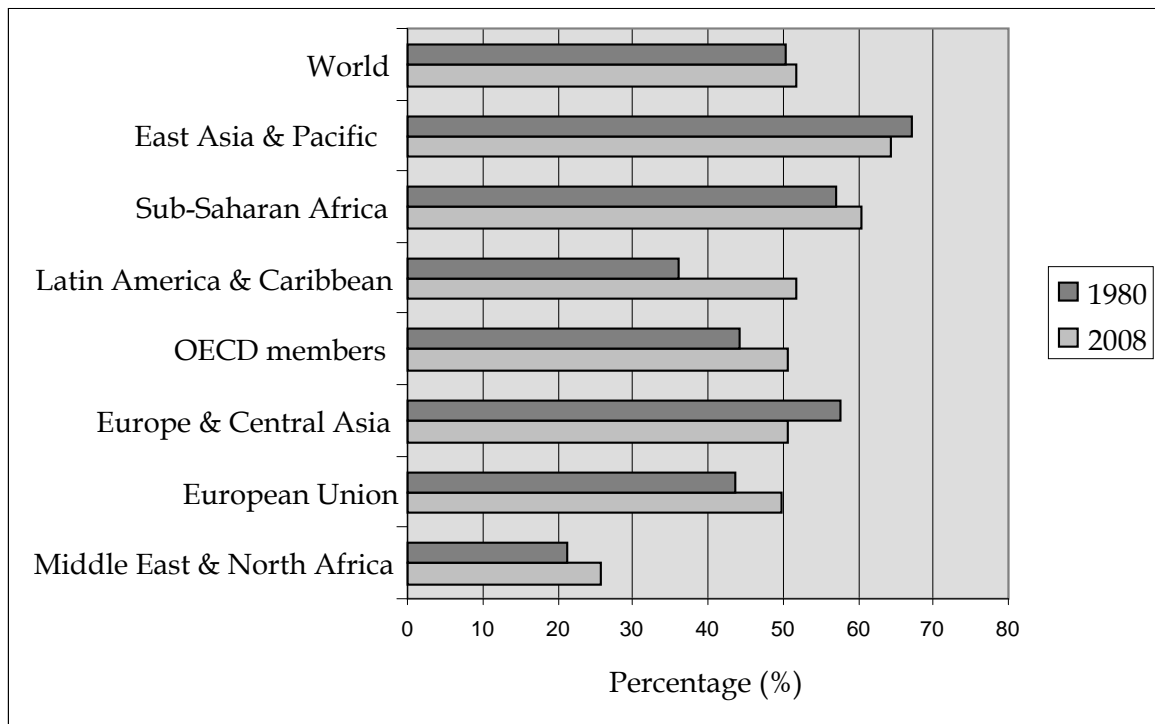
Furthermore, significant gender wage gaps persist—caused by occupational segregation and associated wage penalties for “women’s jobs”, as well as discrimination. In fact, across OECD countries, median wages for men are higher than those for women, even among full-time employees. In 2004, the average difference was 15 per cent. The wage gaps were particularly high (exceeding 30 per cent) in Japan and the Republic of Korea (hereafter South Korea), and comparatively smaller in the Nordic countries (OECD 2005), even though Nordic labour markets are also gender-segmented (in fact more so than some of the East Asian countries) (see figure 2). The relatively small gender wage gaps are due to the high levels of gender equality more broadly, as well as the generally homogeneous social structure and small wage dispersion in the Nordic labour markets in general due to wage compression policies adopted by trade unions (Melkas and Anker 2003).

**Figure 2: Gender gap in median earnings of full-time employees, 2004 or latest year available**



In the past few decades women’s labour force participation rates have also been rising in several other regions (see figure 3), especially Latin America and also Middle East and North Africa (MENA), though in the latter case it started from a very low base. While some of this change may be a statistical artefact (that is, better methods for capturing women’s work, which has been historically undercounted), it also reflects real changes. There are, however, also some exceptions to this general global trend, notably the transitional economies of Eastern Europe and Central Asia which have seen reversals in women’s labour force participation since 1980s as shown in figure 3.

**Figure 3: Labour force participation rate (per cent of female population, age 15+)**



Source: World Bank 2010.



Some of the increase in women's labour force participation has been attributed to the growing significance of international trade<sup>10</sup> (relative to GDP) in recent decades. The rapid growth of production for export markets (such as clothing and footwear, horticultural products, as well as computer-related services such as data entry and software production) has increased demand for female labour, deemed more "docile" and better fit to do repetitive work.<sup>11</sup> This trend was particularly evident in northeast Asia (i.e. South Korea and Taiwan) in the 1970s and 1980s, and later in southeast Asian countries like Thailand and Malaysia, as well as in China. In South Korea, for example, women's share of total manufacturing employment increased from 32.8 per cent in 1970 to 41.5 per cent in 1990, but declined thereafter (as can be seen in table 1 which shows the post-1990 period; see also box 2).<sup>12</sup>

**Table 1: Female share of paid employment in manufacturing, selected Asian economies, 1991–2009**

	Per cent			Percentage point change	
	1991	2000	2009	(1991-2000)	(1991-2009)
China	42 <sup>a</sup>	46	-	+4	-
Hong Kong (SAR, China)	47	43	33	-4	-14
Republic of Korea	41 <sup>b</sup>	36	30	-5	-11
Singapore	45	41 <sup>c</sup>	-	-4	-
Taiwan Province of China	45	42	-	-3	-
Thailand	50	49	53	-1	+3

Notes: <sup>a</sup> Data for 1990; <sup>b</sup> Data for 1992; <sup>c</sup> Data for 1999. Source: ILO 2010b. Data are from ILO 2004 except for Taiwan Province of China, which are from Directorate General of Budget and Statistics 2003, and China, which are from National Bureau of Statistics 2004.

In addition to growing demand for female labour, other factors, such as the rising levels of female education, falling fertility rates, and changing aspirations may have also contributed to the growing tendency by women to seek employment (UNRISD 2005). However, on the more negative side, there is also evidence of what may be called "distress sale" of labour in contexts where falling earnings of other household members, especially male breadwinners, due to unemployment or underemployment, has propelled women into the paid workforce. This has been shown for several countries in Latin America, most notably Argentina and Mexico, which have endured recurrent economic crises since the early 1980s (Cerrutti 2000; Gonzalez de la Rocha 1988). In post-apartheid South Africa as well, unemployment among men seems to have led to greater labour force participation among women (Casale 2003, cited in Heintz and Lund 2011). Deborah Bryceson's work in rural Tanzania also documents how the "scramble for cash has caused an upheaval in age-old gender and generation divisions of labour" (Bryceson 1999:17) and how "rural women often refer to their new income earning role in terms of it having been thrust upon them by worsening economic circumstances" (Bryceson 1999:19).

The literature on women's work in the context of globalization points to three sets of contentious issues. The first is that the narrowing of the gender gap in economic participation rates has not produced commensurate gender equality in pay and status. This is due, at least in part, to continuing occupational sex segregation, defined as the separation of women and men into different occupations.<sup>13</sup> Recent research finds that despite some improvements in the 1990s, levels of gender segregation in the labour market remain significant throughout the world (Anker et al. 2003). The latest (2011) figures from the ILO suggest that the average shortfall of women's earnings compared to men's was 22.9 per cent during the period 2008–2009, which marks an improvement over the gap observed in 1995 (26.2 per cent). Nonetheless

<sup>10</sup> For a fuller analysis of the employment effects of trade liberalization, see also section 3 below.

<sup>11</sup> Elson and Pearson 1981; UN 1999; Standing 1999.

<sup>12</sup> The pre-1990 data was obtained from Cho et al. 2004.

<sup>13</sup> Occupational segregation is "one of the most pernicious aspects of inequality in the labour market, since it is generally accompanied by lower pay and worse working conditions in female occupations" (Anker et al. 2003:1). A widely used index for measuring occupation segregation is called the index of dissimilarity.

the report notes that “at the current pace of progress it would take more than 75 years to apply the principle of ‘equal remuneration for work of equal value’” (ILO 2011a:15).

Some of the existing data on gender wage gaps in the manufacturing sector is presented in table 2. To take the latest year for which we have data (2008), the lowest female to male wage ratios in the manufacturing sector were as low as 57 per cent in South Korea and Swaziland, and 61 per cent in Brazil.

**Table 2: Female to male manufacturing wage ratios, selected countries, 1990–2008**  
(percentage)

	1990	1995	1999	2008
<b>Africa</b>				
Egypt	67.9	73.6	75.2	66.2 <sup>g</sup>
Kenya	73.3	92.8	-	
Swaziland	87.7	86.6	62.8 <sup>a</sup>	56.6 <sup>c</sup>
<b>Latin America</b>				
Brazil	53.6	56.9	61.7	61.3 <sup>d</sup>
Costa Rica	74.3	70.9	73.1	94.6
El Salvador	94.1	96.6	62.0	63.7 <sup>f</sup>
Mexico	-	68.7	69.7	71.8
Panama	-	-	93.2	96.8
Paraguay	66.5	79.5	54.6	108.2
<b>Asia</b>				
Hong Kong (SAR China) <sup>b</sup>	69.5	60.9	57.3	60.4
Korea, Rep. of	50.3	54.1	55.6	57.2 <sup>g</sup>
Malaysia	50.1	57.9	62.9 <sup>(1)</sup>	
Philippines	-	74.3	79.9	92.2
Thailand	-	61.6	64.8	75.4 <sup>e</sup>

**Notes:** The female to male wage ratios are calculated as the ratio of the average female manufacturing wage (across all sub-industries, such as textiles, electronics and shipbuilding, and all occupations), relative to the average male wage, similarly measured. The ratio can vary because women are paid less than men in the same occupation and industry, but also because women's employment is concentrated in substantially different occupations and industries than men, with consequent effects on wages. Thus, job segregation, education or other productivity-related factors, or simple discrimination can influence wage ratios. None of this is reflected in the raw gender wage ratio. <sup>a</sup> Data for 1997; <sup>b</sup> Non-agricultural wages; <sup>c</sup> Data for 2000; <sup>d</sup> Data for 2002; <sup>e</sup> Data for 2003; <sup>f</sup> Data for 2006; <sup>g</sup> Data for 2007. **Source:** Calculated from ILO 2004, UNSTATS 2010.

However, on the more positive side, ILO data suggest that in Latin America, women's average income per hour in non-agricultural sectors increased from 68 per cent to 78 per cent of men's between 1990 and 2000. The improvements in gender wage gaps in manufacturing appear to be particularly striking for Costa Rica (where women's wages as a percentage of men's wages improved from a little over 74 per cent to about 95 per cent), while El Salvador exhibits a severe deterioration in women's relative wages over the same period. In some Asian countries where the gap was wider, there has also been some narrowing, especially in Japan, Malaysia and South Korea (and apparently the Philippines). Despite this trend, men in these Asian countries still earn 40 per cent more than women (ILO 2007:8). The persistence of gender inequality in East Asia has received considerable attention from feminist economists given that these are countries that have achieved a remarkable transformation of their economies in a relatively short period of time (see box 1).

### Box 1: The East Asian “miracle” and gender equality

A key component of the strategy of industrial “catch-up” in both South Korea and Taiwan was to target investment in strategic sectors to help industries acquire the technology they needed to upgrade. It has been argued that low wages for women, roughly half those of men, were a stimulus to growth, since women’s low wages kept the cost of exports down, financing the acquisition of technology (Seguino 2000a, 2000b). These low-cost exports were produced primarily by women, who faced job segregation in export industries. Young, unmarried women played a key role in the early, labour-intensive phase of industrialization between the early 1960s and 1973, with state policy deliberately mobilizing such labour. High rates of economic growth and structural transformation guaranteed near-full employment, rising wage rates and some forms of corporate welfare (in the case of South Korea) for a significant share of the male workforce. Women workers, in contrast, remained in a relatively disadvantaged position throughout this period. To be sure, the number of economically active women grew continuously in the 1960s and 1970s, and women’s share of total employment also increased. The sectoral composition of the female workforce also shifted during this period, from agriculture to manufacturing.

From the 1980s onward, post-industrial strategies in both Taiwan and South Korea turned from the manufacturing of labour-intensive exports away and diversified into capital- and skill-intensive products in an attempt to upgrade their economies technologically. While export-led regimes of the 1960s resulted in the “feminization of manufacturing labour” in Taiwan, the simultaneous opening up to foreign direct investment and domestic capital mobility from the 1980s onward has reversed into a “de-feminization of labour” (Berik 2009). The displacement of female manufacturing employees was not matched by a significant absorption of female workers in other sectors. A similar process of de-feminization has been documented for South Korea, where the demand for women’s labour in manufacturing weakened by the early 1990s, and where the composition of the workforce in the electronics industry changed in favour of male workers as production in this sector shifted to more sophisticated communication and computer products (UN 1999).

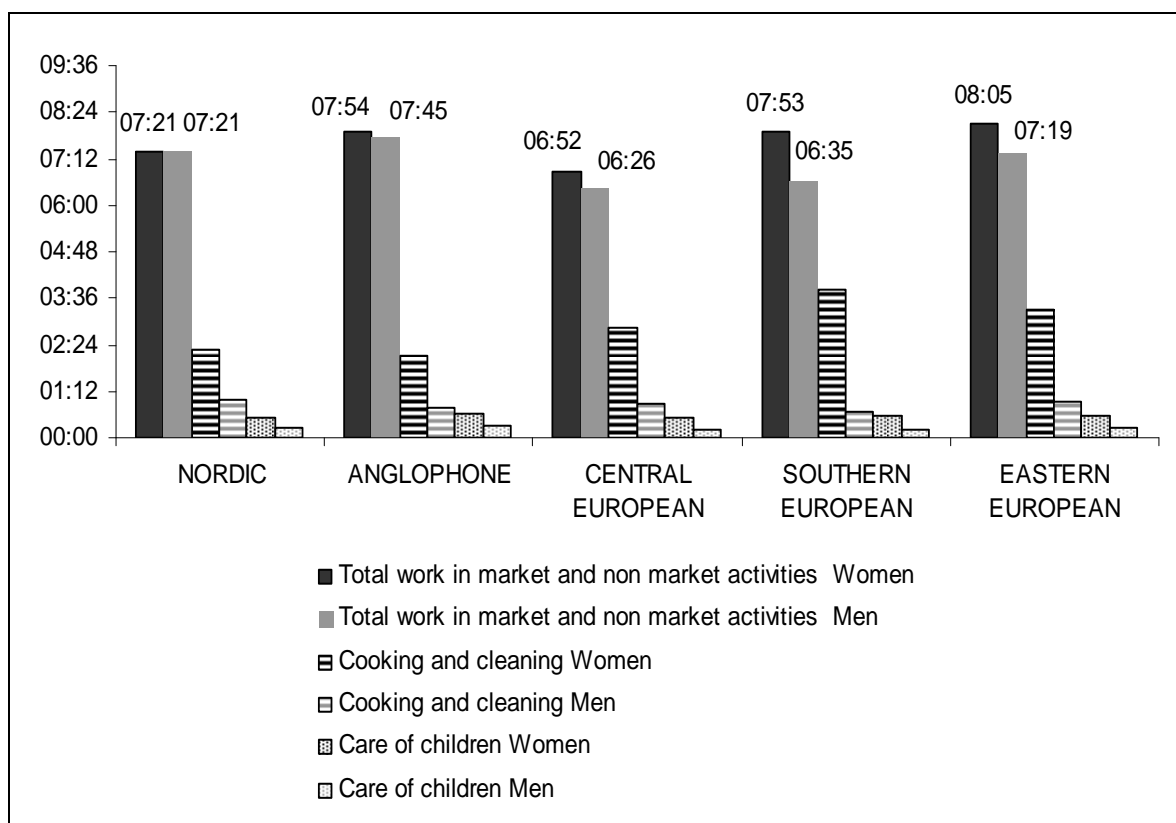
A second critical issue is that while women’s access to paid work has increased in most countries in the last two to three decades, their access to employment-related social protection instruments (maternity leave, health insurance, unemployment insurance, old age pension, childcare services) remains limited. Recent estimates by the ILO suggest that around 75–80 per cent of the world’s population has no access to basic social protection (ILO 2011b).<sup>14</sup>

The growth of informal employment across the world, along with the casualization of formal sector employment, has allowed employers to lower labour costs and to sidestep social security obligations and labour laws. It is indeed ironic that after generations of efforts to integrate women into regular wage labour as equals, “feminization” has happened in a double sense: not only have labour markets included more women, but the convergence between male and female rates of participation has been toward the type of employment patterns historically associated with women (insecure and precarious work) (Standing 1999:583; Beneria 2001). Even where women have entered growth engines in their countries, as in the case of factory work in export-oriented industries in Mexico and China, formal employment has not constituted a route for women to access social protection measures (Brachet-Márquez and de Oliveira 2004; Davin 2004).

The third critical issue is that the division of reproductive work in the private sphere seems to have either not altered, or altered only slightly, in favour of women. As shown in figure 4, the gender differences in unpaid activities—cooking, cleaning and taking care of children—are significant across high-income countries (clustered into different regional groupings), including the Nordic cluster. It is only in the Nordic cluster that women and men spend on average about the same amount of time on all work combined; in all other regional clusters women’s total work time exceeds that of men. In socially egalitarian countries like Sweden, paternal leave provisions mandate a portion of parental leave for fathers (Bergman and Hobson 2002). It is women, however, who continue to retain principal responsibility for family care and domestic work throughout their lives, even when (as is often the case) married women and women with children are also in some form of paid work throughout their active years.

<sup>14</sup> The estimates are not disaggregated by sex.

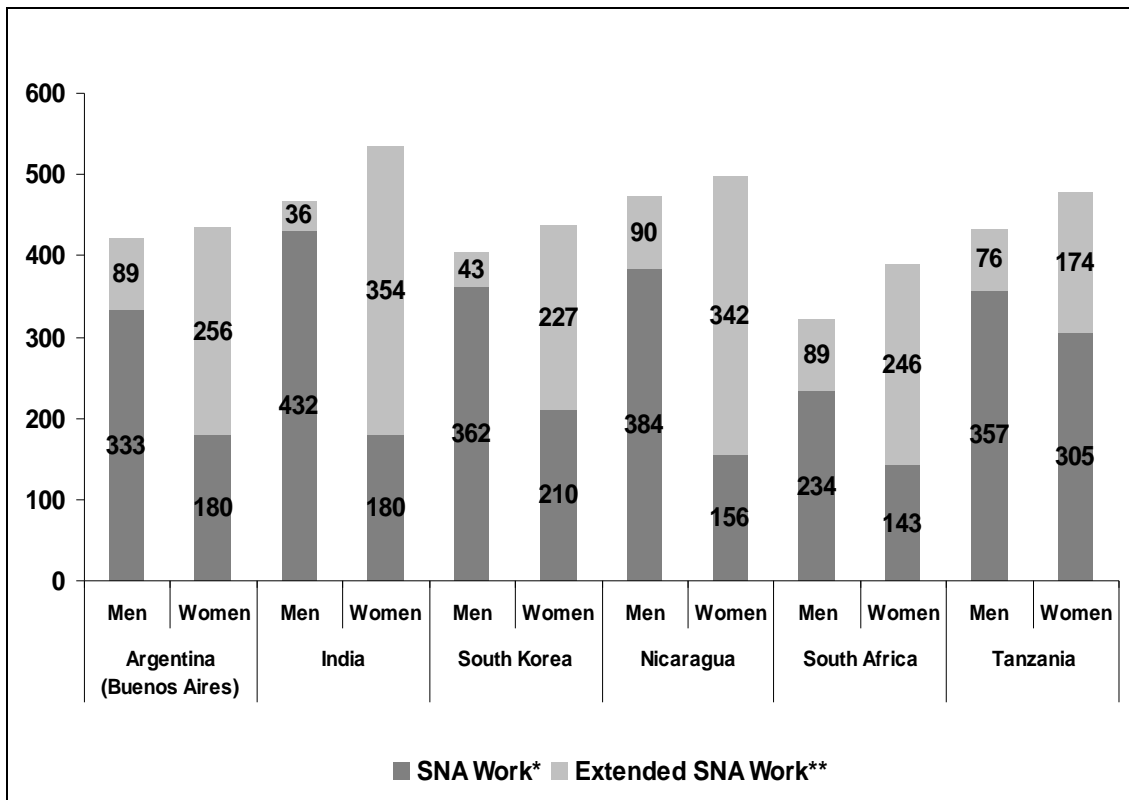
**Figure 4: Selected high-income countries, mean time spent per day by women and men in market and non-market work, by regime cluster<sup>a</sup>**



**Notes:** <sup>a</sup> The following countries are included in each cluster: Nordic (Finland, Norway and Sweden), Anglophone (Canada, United Kingdom and United States), Central European (Belgium, France and Germany), Southern European (Italy, Portugal and Spain), Eastern European (Hungary, Poland and Slovenia). **Source:** Based on UNDP 2008.

For developing countries there are few analyses of time use data to allow comparisons to be made over time. The inequalities in the provision of unpaid care work—unpaid housework, care of persons and “volunteer” work—are starkly captured in the time use survey data that is now becoming increasingly available for developing countries. Analyses of time use data show that women’s hours of paid work are less than men’s, while men contribute less time to unpaid domestic and care work. Among the countries that were included in an UNRISD project (India, South Korea, South Africa, Tanzania, Argentina and Nicaragua) the mean time spent by women on unpaid domestic and care work was more than twice the mean time spent by men (Budlender 2008a; see also figure 5). When paid and unpaid work were combined, women in all six countries allocated more time to work than men—meaning less time for leisure, education, political participation and self-care. In general, therefore, it is fair to say that “time poverty” is more prevalent among women than men. Time use data from Uruguay show similar levels of gender inequality: 72 per cent of all the time that is allocated to unpaid domestic and care work is done by women, while only 28 per cent of it is done by men; and conversely, 65 per cent of all paid work is done by men while 35 per cent of it is done by women (Filgueira et al. 2011).

Figure 5: Mean time spent per day on SNA work<sup>a</sup> and extended SNA work,<sup>b</sup> by country and sex for full sample population<sup>c</sup>



Notes: <sup>a</sup> The System of National Accounts (SNA) distinguishes production that is included in calculations of GDP and that which is not. SNA work includes the production of all goods (whether or not they are sold on the market) and services that are sold on the market. <sup>b</sup> Extended SNA—or unpaid care work—refers to work that is excluded from the calculation of GDP, such as housework in one's own home and unpaid care for children, the elderly, people who are ill or disabled. <sup>c</sup> In contrast to the mean actor time, the calculations for the full sample population include those who spend no time on caring. Source: Budlender 2008a.

But these statements relate to averages calculated across the population. In fact, the distribution patterns for men and women in the six countries studied by UNRISD are very different, with low variability among men (that is, men seem to do a consistently low amount of unpaid care work) and high variability among women (some women do significantly more unpaid care work than others). As a consequence, there is a notable level of in-group inequality among women. Age, gender, marital status, income/class, race/caste and the presence of young children in the household are some of the factors that influence variation in the time people spend on unpaid care work. Household income, for example, tends to have an inverse relation with women's time inputs into unpaid care work: in low-income households women allocate more time to such tasks than in high-income households, possibly a reflection of the fewer possibilities of purchasing care services, limited availability of social infrastructure like drinking water, and larger household size. Having a young child in the household has a major impact on the amount of unpaid care work assumed by women and men.<sup>15</sup> The time use data for Uruguay shows a similar pattern in terms of income levels and the presence of young children in the household: young women from the lowest income quintile with young children spend the largest amount of time doing unpaid work (about 8 hours) while men in the same income quintile and age bracket spend 2 hours or less on unpaid work; the gender gap narrows in higher income quintiles (Filgueira et al. 2011).

<sup>15</sup> Detailed analyses of the time use data for the UNRISD project countries can be found in the edited volume by Debbie Budlender (2010), *Time Use Studies and Unpaid Care Work*, Routledge.

A global overview of labour market trends over the past three decades shows both continuity and change in how women and men allocate their time:

- Women have entered the labour force in increasing numbers, starting from a very low base in some regions (e.g. MENA); in other regions though there have been reversals (for example, Eastern Europe and Central Asia)
- Where women's labour force participation has increased, it has been due to a combination of factors: increasing demand for female labour; pressure to seek paid work in order to replace or complement the (falling) earnings of other household members; a growing tendency on the part of women to seek paid work due to rising levels of education, falling fertility rates, and changing aspirations
- Despite the convergence in women's and men's labour force participation rates, gender-based occupational segregation and gender wage gaps have not significantly reduced, even in the advanced industrialized countries.
- Women's access to employment-related social protection measures remains low, in part due to the casualization of many formal sector jobs as well as the growth of casual and informal work
- The division of unpaid reproductive/care work between women and men remains unequal; but there are also inequalities among women, as those from disadvantaged social groups tend to take on a heavier load of such work.

The following section will try to explain why we may be seeing some of these outcomes.

## 2. Gender Analysis of Labour Markets and Work: Some Definitions and Concepts

Why has the increasing demand for female labour not had a more positive impact on women's wages vis-à-vis men's, especially at a time when education gaps between women and men have narrowed? Before we answer this question, it is useful to clarify some of the terminology that is used in the paper.

**Employment** (in general) is defined as work in activities that produce goods and services that are valued and included in the system of national accounts (SNA)—that is, those economic activities that are officially counted as part of an economy's GDP. These market-based exchanges can take many different forms and are not confined to situations where individuals exchange their labour directly for a salary or a wage (such as typical employer-employee relation). Those who are self-employed, whether farming their own land or working as street vendors, engage in other forms of market transaction to realize the value of their labour. The definition of employment and labour markets used in this paper embraces all these forms of exchange, even though in practice they are not all consistently captured and counted in labour force surveys and calculations of GDP. As is widely known by now, the difficulties of capturing different forms of work are particularly acute in the case of women who are more likely than men to take on "atypical" forms of work. A large proportion of employed individuals worldwide do not earn enough to lift themselves and their dependents above the poverty threshold ("the working poor"). The quality of employment therefore also matters, and not simply the quantity of jobs.

The quality gap between formal, regular employment and informal employment represents one of the principal cleavages in the overall structure of employment today. This in turn translates into income inequalities, particularly in developing countries, but increasingly in high-income industrialized countries as well (Chen et al. 2005; Heintz 2008). The concept of **informal employment** captures employment relations that are not governed by statutory labour market regulations and/or basic legal and social protections (see box 2). Existing evidence suggests that in most regions of the world, informal employment constitutes a larger proportion of women's total employment than it does of men's total employment.<sup>16</sup> This issue is elaborated in more detail in section 4. However, what is also important to underline is that both the conceptual and definitional changes (see box 2), and the fact that in many developing countries labour force

<sup>16</sup> ILO 2002; Chen et al. 2005; UNRISD 2010.

surveys are not regularly conducted, make it difficult to provide robust trend data, especially on changes in informal employment over time (see section 4).

### Box 2: A note on informality

**Informal employment** used to be defined as employment in the “informal sector” (or unorganized sector), with the informal sector being comprised of all informal **enterprises**. Informal enterprises are usually distinguished from formal ones on the basis of their legal and registration status, size or a lack of formal accounts. However, in recognition of the changing nature of labour markets, an expanded definition of informal employment was recommended at the 17th International Conference of Labour Statisticians which extends the concept beyond informal enterprises and captures employment in unprotected or unregulated **jobs** (regardless of the nature of the enterprise). In other words, informal employment is employment without any form of protection (job security or social security). This expanded definition which is being increasingly used by researchers includes: (i) workers in informal enterprises, and (ii) workers without any form of protection elsewhere in the economy, including within the formal sector.

Apart from employment (work that is counted in labour force statistics) we also include **unpaid work** as a critical component of work more broadly conceived in this paper, given its significance in terms of how people spend their time, including the time they are able to allocate to paid work, and its fundamental role in (re)producing labour and human capabilities – the rock-bottom foundation of any economy. The available evidence from time use surveys suggests that the volume of such work is significant even in high-income countries (UNDP 2008). A recent estimate based on six developing countries that formed part of an UNRISD study mentioned above, showed that if such work were assigned a monetary value it would constitute between 10 and 39 per cent of GDP (Budlender 2008a).<sup>17</sup>

While unpaid work is essential for both human well-being and economic growth, the costs of its provision are unequally borne. Women, as we have already seen, carry a disproportionate share of such work, while many of its benefits go to society more broadly (as children grow up, join the work force, pay taxes and so on).<sup>18</sup> The costs, as the previous section showed, are also unequally born across income groups. Women in lower-income households find it more difficult to outsource their unpaid care obligations (to paid domestic workers, nannies or private crèches) or to purchase time-saving substitutes. They are also likely to have higher rates of fertility.

Those who bear the main responsibility for unpaid care work need to make some adjustment in their paid work. The latter may have to be interrupted, for example when children are very young or a family member is sick, or adjusted in other ways, such as by reducing the hours of work (for example, by taking on part-time work), or by taking on less remunerative work which offers more flexibility in terms of the timing or the location of the activity (such as industrial outwork or homework). These choices, which are clearly constrained ones, are likely to have adverse implications for earnings, work-related benefits and old age security.

Women’s disproportionate responsibility for the unpaid work of caring for dependents is thus one of the factors that restricts and shapes their access to paid work. The failure of labour markets to acknowledge the contribution of unpaid reproductive work to the economy is a reflection of the fact that labour markets are “bearers of gender”, as feminists have long argued (Whitehead 1979; Elson 1999).<sup>19</sup> Labour markets are gendered institutions also by operating on the basis of formal rules and informal practices that value male and female labour differently, regardless of the levels of “human capital” that they embody. With the closing of the education

<sup>17</sup> These figures were obtained by multiplying the estimated number of hours spent on unpaid care work by a “generalist wage”, that is, using the average wage paid to a worker, such as a domestic worker or housekeeper, who would carry out virtually all care-related tasks.

<sup>18</sup> Nancy Folbre (1994) suggests that care work has features of a public good, since many of its benefits extend well beyond the individual care recipient, and go to society and the economy.

<sup>19</sup> The distinction between institutions that are “gender-ascriptive” and those that are “bearers of gender” was first made by Anne Whitehead (1979). Conjugal relations, for example, are gender-ascriptive, where “husband” and “wife” are ascribed gender identities; this is not the case with employer-employee relations, which are often “bearers of gender”, where maleness is very often associated with having authority over others and where particular types of work are considered to be “feminine” or “masculine” and differentially valued.

gap between women and men in many countries it is difficult to explain gender wage gaps in terms of educational attainments. But neoclassical economists would caution that the gender wage gap that persists may reflect “additional unobserved or unmeasured differences in worker and job characteristics between men and men” (see World Bank 2011:205).

The problem with this reasoning—as with the human capital “explanation” for gender-based wage gaps—is that differences between female and male workers (for example, in terms of their “human capital” endowments) are themselves very often the outcome of structural and discriminatory forces, such as fewer years of labour market experience due to care-related interruptions in paid work, as well as gendered definitions of skill “that are saturated with sexual bias” (Phillips and Taylor 1980:79). In the neoclassical worldview, labour markets are neutral arenas where buyers and sellers of labour interact. The erosion of gender wage gaps in this textbook world would require the elimination of all gender difference: women would have to ensure that they have the same characteristics and tastes as men (similar years of schooling, studying the same subjects, obtaining the same training, doing similar jobs and so on).

There are, however, rival views of markets that do not begin from the idea of markets as neutral and anonymous spheres of exchange, but as institutions that are inherently social and political, encompassing particular forms of social power (Polanyi 1957; Chang 2001). There is a related body of feminist literature which conceptualizes labour markets as gendered institutions, operating at the intersection of the productive and reproductive spheres.<sup>20</sup> These analyses make three key points:

- women and men do not come to the market with the same resources (both material and social);
- both formal rules and informal practices that structure the operation of labour markets are themselves often a reflection of gender relations in society within which markets are embedded; and
- men and women have very different roles and relationships to the unpaid care economy or the “reproductive sector” which shapes their interface with labour markets.

Women are therefore more likely to be constrained in taking advantage of new economic opportunities because they lack assets, resources (including time) and social contacts, and because of social obligations grounded in the unpaid economy. Payment and promotion systems, likewise, no matter how much they are codified and rule-based always have scope for discretion: performance-related payment systems, for example, seem to apply different criteria of good performance to women and men even within the same job, and occupations which are predominantly undertaken by women tend to have grading systems that compress jobs into a narrow range of grades offering fewer opportunities for promotion (Elson 1999).

The cultural acceptability of paid work, especially when it takes place outside the home, the varying effects of women’s life course, and the status of their households are among other factors that shape women’s experiences of paid work, whether formal or informal. Ethnographic research suggests, for example, that married women often make concessions in their private lives in return for permission to take up paid work (Kabeer 2007 and references therein). Sometimes this entails handing over their wages to their husbands to keep the “male breadwinning” role intact. At other times it may mean redefining motherhood to include the purchase of basic essentials or education for their children. It may also mean that men reduce their contribution to the household budget while women cover the deficit from their wages (Folbre 1994). Very often it involves women putting in long hours of unpaid work to ensure the fulfilment of what are defined as their primary responsibilities. All of these variables mean that women’s engagement in paid work does not automatically translate into greater decision-making power, control over own earnings or a reduction in unpaid care responsibilities.

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<sup>20</sup> Beneria 1999; Elson 1999; Pearson 2000; Whitehead 2009.



If we see labour markets for what they are—social institutions that operate on the basis of social norms and power inequalities—then it is not too difficult to understand why gender-based hierarchies and segmentations may persist even when the demand for female labour increases and the gender gaps in educational attainment shrink. The fact that labour market rules and norms contribute to employment segregation is not indicative of “market failure”, but part of how real markets (as opposed to the abstract market of neoclassical textbooks) operate. The solution then is not for women to give up nursing (because nursing is a female-dominated occupation that is not “valued” by the market) in order to become engineers (a male-dominated occupation where wages are relatively higher), but to create social mechanisms that reduce wage gaps through effective institutions that represent the interests of different groups of workers (solidarity wage-setting). Unions and collective bargaining can “compress” wage distributions, thereby reducing wage inequality overall—including gender-based wage inequalities (ILO 2011a).

To understand employment from a gender perspective, the following considerations must be taken into account:

- employment takes many different forms and it is not confined to situations where individuals exchange their labour directly for a salary or a wage;
- women and men do not come to the market with the same resources (such as land, capital, social networks);
- women are more likely than men to be constrained by social obligations (for example, the need to care for their dependent) and social norms (for example, restrictions on their physical movement) in accessing labour market opportunities; such constraints are more accentuated on some groups of women (women in their reproductive years, women in lower-income households);
- the rules, both formal and informal, that structure labour markets often embody discriminatory social/gender norms (gendered assumptions about women's work being “unskilled”, or women's incomes being “pin money”); and
- women are more likely than men to experience constraints on how they dispose of their earnings.

Gender analysis of markets as social institutions thus suggests that inequalities of gender are pervasive in markets; it also suggests that labour markets ultimately depend on the unpaid economy for the (re)production of labour on a day-to-day basis and across generations.

### 3. The Globalization Agenda: Gendered Employment Effects<sup>21</sup>

Explicit labour market policies are defined as policies that provide income replacement and labour market integration measures to those seeking work, usually the unemployed, but also the underemployed and those who are looking for better jobs. So-called “passive” policies are concerned with providing replacement income during periods of joblessness or job search (for example, unemployment insurance), while “active” labour market policies refer to labour market integration through demand- or supply-side measures (such as labour market training) (Auer et al. 2008). While these active labour market policies are useful in reducing the mismatch between labour demand and supply (by retraining workers for example), their impact on overall employment and its quality can be marginal, and they also have to be complemented by macroeconomic policies of economic growth and employment creation (Auer et al. 2008). Hence macroeconomic policies and so-called industrial policies that are not explicitly about employment often play a more important role in stimulating demand and generating employment than explicit labour market policies. This is particularly the case in developing countries, with very high levels of structural unemployment and underemployment. These policies have been at the core of the globalization or liberalization agenda of the past three decades, and form the basis of this section of the paper.

Globalization refers primarily to the “accelerated increase in international economic relations in the recent period, usually associated with greater economic liberalization, both internationally as well as within national economies, from the 1980s” (Jomo 2003:1). Components of this agenda have included trade and financial liberalization, deflationary macroeconomic policies, fiscal restraint, privatization of state-owned enterprises and the introduction of market

<sup>21</sup> This section draws extensively on the background paper prepared by Elissa Braunstein (Braunstein 2012).

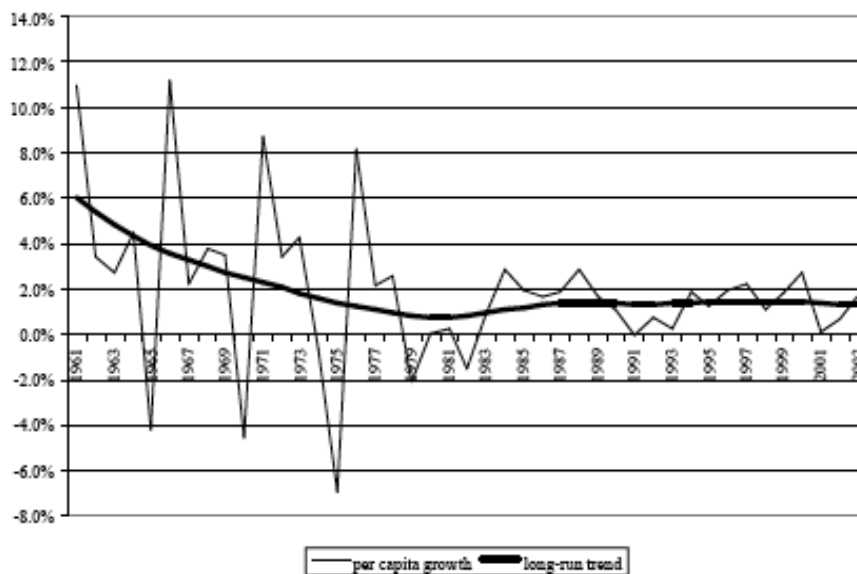
principles (“quasi markets”) into the public sector, and labour market liberalization. As the analysis below will show, many of these policies are interlocking: for example, the pressure on governments to reduce public spending and public sector employment is due both to open capital accounts (and the fear of financial outflows should countries run deficits) and the related tendency by some governments to run huge foreign exchange reserves as an insurance against financial crises.

We focus on some of these areas not because they represent an exhaustive list of the relevant policy channels that link globalization to employment effects, but rather because they capture the main areas of research to date. Much more remains to be done and understood about this relationship, as is clear from the gaps and contentions covered (and not covered) in this paper (Braunstein 2012).

However, before we turn to these policy channels, we note two broad trends that have coincided with the consolidation of the liberalization agenda. The first is the general slowdown in global economic growth; the second is the rising levels of income inequality within the majority of countries around the world (UNRISD 2010).

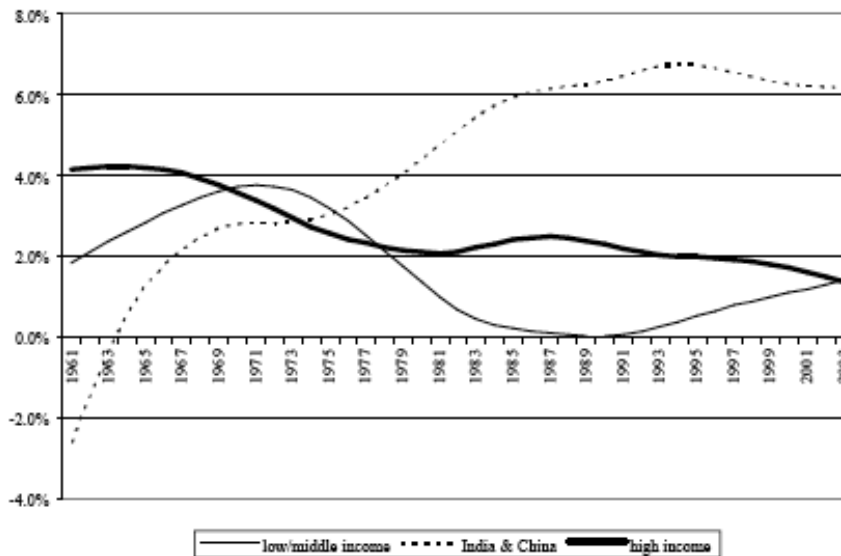
Figure 6 presents per capita world GDP growth between 1961 and 2003, both the annual figures and the long-run trend. Figure 7 separates out low- and middle-income countries versus high-income countries, with China and India—the main drivers of developing country per capita GDP growth since the early 1990s—represented separately. Low- and middle-income countries experienced increases in per capita growth in the late 1960s and early 1970s, declines through the late 1970s and late 1980s, and then increases since the mid-1990s, but growth was still very sluggish relative to earlier periods. India and China, on the other hand, have done quite well since the early 1980s, whereas high-income countries have seen a decline since the early 1960s. The latter countries have seen spurts of rapid growth based on bubbles (in real estate, the mortgage market and related financial products) which, in the United States for example, sustained consumer demand. But the collapse of the bubbles revealed the underlying structural problems of these economies and the danger of depending on financialization to support employment and welfare (Heintz and Lund 2011). Financialization has increased volatility and triggered crises in developing countries as well—particularly in the so-called “emerging market economies” such as Argentina, Brazil and Turkey, with deepening financial markets (more on this in the following section on financial liberalization).

**Figure 6: World per capita GDP growth and its long-run trend, 1961–2003**



Source: Heintz 2006.

**Figure 7: Long-run trends in average per capita GDP growth, select country groupings, 1961–2003**



Heintz 2006.

Source:

The second important long-term trend associated with the globalization era is rising inequality of income and wealth across countries. Levels of income inequality within countries increased considerably in the 1980s and continued throughout the 1990s. Examining 85 countries, the ILO found that during the 1990s more than two-thirds experienced an increase in inequality, as measured by the Gini coefficient (ILO 2008:9). This is partly accounted for by changes in the functional distribution of income, that is, the relative share of profits and wages in GDP, which has moved sharply against the latter (UNRISD 2010). Apart from their corrosive social and political implications, there is increasing evidence that inequality is not simply “an outcome of globalization, but a vital structural causal factor responsible for the financial crisis” (Saith 2011:72). As Ashwani Saith goes on to argue:

Without denying the relevance of other explanatory factors such as governance and regulatory deficits, this argument places the prime emphasis on inequality and has the powerful and distinctive policy implication that similar crisis episodes are likely to be reproduced if the underlying structural conditions, including especially forms of financialization that are increasing detached from the real economy, are not frontally addressed (Saith 2011:75).

### ***Financial liberalization, volatility and crisis***

Neoliberal monetary policies have emphasized the opening up of capital markets to external flows and keeping inflation rates low. Efforts to contain inflation or meet balance of payments constraints encourage countries to maintain high real interest rates. High interest rates in turn attract short-term capital inflows. A sudden reversal of these capital flows throws the financial sector into disarray, leading to crises in the real economy. Many of the financial crises that occurred in recent decades—for instance, in East Asia, Argentina, Brazil and Turkey—were a consequence of rapid shifts in cross-border financial flows (Heintz and Lund 2011).

Financial liberalization constitutes one of the most controversial aspects of globalization.<sup>22</sup> This is because of its association with financial volatility and crises which have in turn had negative

<sup>22</sup> Grabel 2011; Van der Hoeven and Lubker 2006; Ocampo 2005.

effects on income and employment. Policies that have facilitated global financial integration are therefore coming under increasing scrutiny.

While all types of global financial flows have increased tremendously since the 1990s, investments in increasing productive capacity have hardly changed at all (Van der Hoeven and Lubker 2006). There are several reasons for this somewhat paradoxical finding. First, much foreign direct investment (FDI) has gone to mergers and acquisition rather than new investments in productive capacity (also known as greenfield investments). Second, the majority of cross-border capital flows are still concentrated among developed countries (with the exception of FDI flows to China). Finally, an increasing share of global capital movements is dedicated to short-term speculation. Another important downside which has become evident since the Asian economic crisis (1997) is the tendency of developing country governments to accumulate foreign exchange reserves as insurance against the prospect of balance of payments crises (to avoid having to go to the IFIs for loans which would come with policy conditionalities). Most of these reserves are held in low-yield treasury bonds issued by industrialized countries, and the opportunity cost of tying funds up in this way is large (Heintz 2006).

There is therefore an emerging consensus among a significant array of economists, including some economists from the International Monetary Fund (IMF) (see Prasad et al. 2003), that regards the potential benefits of financial liberalization in terms of growth and employment generation to have been outweighed by its negative effects due to volatility and crises.<sup>23</sup> The heightened volatility is evident in the increased frequency of financial and economic crises – crises that are not very often triggered by a sudden deterioration in a country's putative "economic fundamentals", but rather are an inherent characteristic of the international financial system and the power asymmetries that it embodies (Heintz 2006; Braunstein 2012).

Focusing on the employment effects, there is growing evidence that financial volatility and crisis in developing countries have had significant effects on the real economy. These real effects are not limited to income decline, but also include social costs like lower employment, increasing unemployment and underemployment, and most importantly for this paper, apparent shifts of workers from formal to informal labour relations. Moreover, what is also evident is that labour market recovery tends to lag macroeconomic recovery by several years, indicating that workers take on a disproportionate share of the adjustment costs of economic crisis and volatility. These adjustment costs take the form of increased levels of structural unemployment that remain above pre-crisis levels even many years after the crisis (as in the case of Argentina after two financial crises, as well as several East Asian countries) and growing labour market informality (Van der Hoeven and Lubker 2006). As we see below, many of the employment outcomes are gendered.

#### Financial liberalization, volatility and gender

Economic crises may affect labour supply in one of two ways: first, by discouraging workers and pushing them out of the labour force, or second, by inducing households to add more workers to the labour market in order to compensate for lower or more volatile household incomes (what is often referred to as the added-worker effect). These new labour market entrants may or may not leave the labour force once the economy turns around. It is widely argued that the added-worker effect is dominant in explanations of crisis-related increases in labour force participation in Latin America, much of it by women (Cerrutti 2000). Increasing labour force participation by women was also accompanied by an increase in the number of hours they devoted to paid work (Arriagada 1994). These supply effects underlie Cagatay and Ozler's (1995) more general results that the worsening income distribution associated with

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<sup>23</sup> This position has been strengthened by the experience of developing countries in the 2008 financial and currency crises: a number of emerging market and developing countries that experimented with a variety of measures that have been referred to as "capital controls" were among the least hard hit by the global crisis. Hence, the IMF has gone so far as to recommend (and officially approve) a set of guidelines regarding the appropriate use of capital account regulations. For a useful commentary on these recent developments and their remaining limitations see Gallagher et al. (2011).

crises linked to structural adjustment policies lead to an increase in women's share of the labour force. In other words, declining levels of income at the lower end of the income distribution can propel women into the paid work force.

Similar work was done on the gendered employment effects of the Asian financial crisis in 1997–1998, with somewhat different results. Women were typically the first to be laid off both because they worked in more cyclically volatile firms, such as small export-oriented enterprises, and because of efforts to protect the jobs of “male breadwinners” (UN 1999). In South Korea, for example, women lost jobs at twice the rate of men, and around 350,000 workers, many of them women, left the labour force altogether, resulting in a decline of the labour force participation rate by almost two percentage points (Van der Hoeven and Lubker 2006). According to a World Bank report in 2000, women constituted 75 per cent of discouraged workers and 85 per cent of retrenched workers in the banking and financial service sectors (Aslanbeigui and Summerfield 2000). It is also noteworthy that South Korea experienced differentiation of employment that took the form of a rapid rise of temporary and short-term employment in the years following the East Asian crisis. According to an OECD study, varied forms of fixed-term, contingent, temporary agency, and on-call workers grew from 16.6 per cent of total wage and salary employment in 2001 to 28.8 per cent in 2006; non-standard employment is estimated to account for 24.1 per cent of men's employment and 40.3 per cent of women's employment (Grubb et al. 2007). This change followed restructuring among large employers that left them with workforce reductions and a forever changed employment structure.<sup>24</sup>

Immediately after the crisis in Indonesia, 46 per cent of the unemployed were women, although they made up only one-third of the workforce. And as more men became unemployed, the percentage of women engaged in paid and unpaid work increased. Similarly, in Thailand women constituted between 50 and 60 per cent of the unemployed (UN 1999). A slightly different pattern was found by Lim (2000) in the Philippines, where the post-crisis decline increased male unemployment more than female unemployment despite a rapid displacement of women from the manufacturing sector (especially in traded goods). The reason was the relative resilience of the service and trade sectors, which employ a high proportion of women. Women did, however, increase their labour force participation to deal with male unemployment, and their total work hours relative to men increased as well. As in other cases, the combination of increasing female unemployment and labour force participation is partly absorbed by increases in informal employment. Women who are new labour market entrants trying to preserve their household income are increasingly drawn into informal forms of paid work (UN 1999).

The crisis in 2008 differed from the majority of recent economic crises in that it began as a financial crisis in the developed world, and reverberated out to developing economies primarily in the form of a negative trade shock. Compared to 2008, world merchandise trade was down 23 per cent in 2009 (WTO 2010, cited in Braunstein 2012).

Globally, men were somewhat harder hit than women during the initial post-crisis years in terms of the rising incidence of unemployment (an increase from 5.4 to 6.2 per cent between 2007 and 2009, versus an increase from 6.0 to 6.5 per cent for women) (ILO 2011c). This was mainly due to a large increase in male unemployment in the developed economies and European Union region, where widespread layoffs occurred in predominantly male industries, especially construction and the financial sector (ILO 2011c). With the initial job losses concentrated among men with relatively good wages and social benefits, the burden has fallen on women to become the sole breadwinners. However, as Heidi Hartmann has pointed out, in the United States women in low-wage jobs such as retail food service, home healthcare, and care services more generally, lack coverage for health and unemployment insurances. Thus the job loss of a male earner with social benefits translates into the decline in health insurance coverage for the entire family (Hartmann 2008, cited in Young and Schubert 2010).

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<sup>24</sup> For more disaggregated data on non-standard work in Korea see Heintz (2008).

However, as Elson (2011) notes, unemployment statistics may not in themselves be a good guide to the relative impact on women's and men's employment. Women who lose their jobs may disappear altogether from labour force statistics, which often just include formal sector jobs. This can happen if workers do not have any rights to unemployment insurance (and thus do not register as unemployed), or because they are discouraged from looking for another formal sector job (because they do not expect to find any). This does not necessarily mean that women become idle; they may take up informal employment, which is not always captured in labour force statistics.

Further, the short-term immediate effects of the crisis in terms of unemployment rates do not tell the full story. A better picture would also have to consider the longer-term declines in tax revenues and resulting cuts in public expenditure in areas that affect women's employment more than men's (Seguino 2011). In both the United States and Europe, the rapid rise in public sector deficits is putting pressure on governments to raise taxes or cut social spending. Fiscal austerity measures will disproportionately affect women who make up a large share of employees in the public social sectors. In the United Kingdom, for example, most of the proposed deficit reduction has come from cuts in public expenditure (and only about 20 per cent from raising taxes), with negative implications for women who make up 65 per cent of workers in the public sector (New York Times 2012). The proposed cuts are also having a disproportionate impact on the finances of women, since a larger share of women's income than of men's is made up of benefits and tax credits, and since women use public services (including elderly care services) more intensively than men (New York Times 2012)

For developing countries, in terms of employment effects, a substantial decline in export markets beginning in late 2008 lowered employment demand along the global supply chain and among developing country exporters. Initial reports link women's and men's unemployment post-crisis with the industries in which they work, not with any discriminatory or male breadwinner bias as in the Asian financial crisis (Hirway and Prabhu 2012; Otohe 2011). For instance, in Ukraine, where the basic metal and metal processing export industries, which primarily employ men, were hit very hard by the collapse in global demand, men's employment declined much more than women's; a similar gender pattern was predicted for South Africa (Jansen and von Uexkull 2010). Conversely, higher proportions of women lost their jobs in Cambodia, Egypt, Mauritius, Morocco and the Philippines largely because of declines in the textile and clothing sectors, where women's employment is concentrated.<sup>25</sup>

Informal workers were also hard hit by the 2008/9 crisis. In India, for example, informal wage workers in diamond polishing faced massive lay-offs, and employment contracts became even more precarious. Similarly, women construction workers suffered from a decline in working days and earnings. Other workers, such as self-employed waste collectors, were also finding it more difficult to survive as demand dropped and prices fell (Horn 2009).

In a consideration of changes in regional figures on labour force participation rates between 2007 and 2009, there is some evidence that, with the exception of North Africa, discouragement (declines in labour force participation) is more pronounced for men than women (Jansen and von Uexkull 2010:36). Alternatively, these statistics could be picking up an added worker effect for women, raising the female labour force participation rate as has happened in Cambodia (Otohe 2011:22).

To the extent that this crisis has lasting effects on growth, export demand, the availability of credit and foreign aid, we are likely to see a repeat of the informalization and intensification of work that followed the Asian financial crisis (Braunstein 2012). However, evidence on the gender differentiated employment outcomes of the 2008–2009 crisis remains fragmentary, and in need of more careful quantitative and qualitative assessment.

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<sup>25</sup> Otohe 2011; Jansen and von Uexkull 2010; Pearson and Sweetman 2010.

There is an emerging consensus that the potential gains from financial liberalization may be outweighed by its negative effects on both growth and employment (due to increasing volatility and crises).

- Some of the evidence on the gender-specific implications of financial crises, especially from Latin America, suggests an increase in women's share of the labour force, triggered by falling household incomes at the lower end of the income distribution. This hypothesis is not always supported by evidence from Asia where women outnumbered men among the unemployed and the discouraged workers who withdrew from the labour force.
- One finding that requires further research is the way in which economic crises seem to induce shifts of workers from formal to informal employment and/or the absorption of new labour force entrants, especially women, into informal types of paid work (see also section 4).

### ***Inflation targeting and deflationary monetary and fiscal policies***

Macroeconomic stability is widely understood to mean simply price stability, as opposed to, for instance, employment stability or financial stability. In combination with the commitment to open capital accounts, maintaining price stability necessitates a distinctly “market-friendly” monetary regime that includes low inflation rates,<sup>26</sup> high interest rates, and freely floating exchange rates (Pollin et al. 2009, cited in Braunstein 2012). This policy regime, sometimes referred to as “deflationary”, can, however, have a largely disabling impact on the real economy – dampening employment, investment and growth. While very high rates of inflation (above 20 per cent) can be harmful for everyone, including workers whose wages will be eroded if not indexed to inflation, there is little evidence to justify maintaining very low rates of inflation (not just in the single digits but very often less than five per cent), when these restrictive policies dampen employment, investment and growth. Critics therefore argue that these anti-inflationary policies largely reflect the interests of financial capitalists that are well-represented in macroeconomic policy circles: even a brief perusal of central bank leaders and managers around the world will show that they are largely drawn from finance and banking (a pool that is also primarily male) (Braunstein 2012).

This underscores the importance of understanding monetary policy from a political economy perspective, and to see its “social content” as well as its social impact (Elson and Cagatay 2000). The distribution of benefits and costs among the “winners” and “losers” provides insights into both a policy’s genesis and its consequences (Braunstein and Heintz 2006). Class is one dimension of this—but feminist economics shows that gender is another. To date research on this issue has been limited; below we draw from one study that did explore the gender implications of inflation targeting.

Braunstein and Heintz (2006) conducted an empirical analysis based on data for 51 “inflation reduction episodes” in 17 low- and middle-income countries. To assess the employment outcomes of inflation reduction periods, they looked at actual employment trends during each inflation reduction episode, disaggregated by gender, and compared these to long-term employment trends.<sup>27</sup> Two significant findings emerge from this exercise: first, periods of inflation decline are highly likely to be associated with employment losses, for both women and men; second, women lose more employment, in percentage terms, than men when employment contracts during inflation reduction episodes, but do not gain employment faster than men in the fewer cases where employment expands during inflation reduction episodes. These results suggest that contractionary monetary policy aimed at reducing inflation often has a disproportionately negative impact on women’s employment. The only other study we know of that has examined the gender impacts of monetary policy is for OECD countries (Takhtamanova and Sierminska 2009); it finds that the link between monetary policy

<sup>26</sup> As Braunstein (2012) explains (see also references therein), a recent policy shift by the IMF and World Bank is that they recommend (and require in the case of conditionalities) all central banks to maintain extremely low inflation targets of usually below 5 per cent (whereas until the mid-1990s the IMF seemed to question the usefulness of such targeting for developing countries). This policy stance is taken despite the fact that there is no evidence that such low levels of inflation promote higher rates of economic growth (see also Cornia 2006).

<sup>27</sup> They also looked at how specific monetary policy instruments (real interest rates, real exchange rates and real money supply) connected to deflationary episodes and their gender-specific effects.

instruments (short-term interest rates) and employment in the nine countries under investigation is weak and does not vary by gender.

- Monetary policy has both a social content and a social impact with distinctive winners and losers defined in terms of class as well as gender
- Maintaining price stability, low inflation rates and open capital accounts—key components of the currently dominant “market-friendly” monetary regimes—can have a negative impact on the real economy, hurting employment and growth

There is some evidence to show that inflation reduction episodes under “market friendly” monetary regimes have a disproportionately negative impact on women's employment (who lose more employment in percentage terms than men when employment contracts); in the few cases where employment expands, however, women do not seem to gain employment faster than men.

### ***Trade liberalization and the promotion of production for export***

While financial liberalization is increasingly criticized for its association with financial volatilities and crises, as the previous section suggested, trade liberalization received a more positive assessment—at least in the 1990s. This positive assessment, centred on the Heckscher-Ohlin theory of international trade and what appeared to be like a relocation of manufacturing production for export to the global South, sees labour in developing countries as a potential winner from greater trade liberalization. Since the turn of the century, as Van der Hoeven and Lubker (2006) observe, a more cautious stand has been taken by many researchers (Rodriguez and Rodrik 1999; Heintz 2006 summarizing much of the literature), including some of those associated with the international financial institutions (World Bank 2005).

The influential study by Rodriguez and Rodrik (1999) found little evidence that open trade policies (meaning lower tariff and non-tariff barriers to trade) are significantly associated with economic growth, and that they can therefore substitute for a development strategy. The idea that the global South is vastly expanding its manufacturing employment (at the presumed expense of Northern workers) was also questioned by actual employment data. As Jayati Ghosh (2003) showed, drawing on manufacturing employment data from the United Nations Industrial Development Organization (UNIDO) and ILO for the 1980s and 1990s, in most Southern countries, trade liberalization has destroyed more local manufacturing jobs than it has created. The exceptions to this trend were China, Malaysia, Philippines and Chile, but the surprising finding was that many of these “successful exporters” experienced only low to moderate employment growth in manufacturing. Carlson (2003 cited in Evans 2008) notes that between 1995 and 2002 manufacturing payrolls dropped globally by 22 million. How is this to be explained?

There is growing evidence that the effect of trade liberalization on growth and employment is contingent on a number of specific policy, country and industry circumstances, including very importantly the manner in which policy restrictions on imports can limit the potentially negative effects of import penetration (Heintz 2006). Comparing Vietnam and South Africa, Heintz (2006) shows how the rapid growth of the export sector in the former country occurred while many restrictions on imports were still kept firmly in place, limiting the impact of import penetration. In South Africa, by contrast, trade reforms and openings have had negligible employment effects because the positive (employment) effects of exports were almost entirely offset by the negative consequences of import penetration (Heintz 2006). China, another successful exporter that has experienced net employment expansion in manufacturing, like Vietnam, has maintained extensive controls on imports and thus allowed a range of domestic manufacturing to survive (Ghosh 2003). The comparison underlines a point long argued by those who have studied the economic success of East Asian countries, namely that many of these countries adopted “strategic openness”, meaning that they pursued an export-oriented strategy while protecting domestic producers from imports (Amsden 2001; Jomo 2003).



Trade liberalization has received a relatively more positive assessment than financial liberalization because of the presumed employment gains for developing countries.

- The liberalization of trade can create new sources of employment (in export-oriented sectors), but it can also destroy jobs (in sectors that compete with imports).

The effect of trade liberalization on growth and employment is contingent on a number of specific policy, country and industry circumstances, including the extent to which domestic production is shielded (through restrictions placed on imports) from the potentially negative effects of import penetration.

### Trade liberalization and gender

Turning now to the gender effects, as section 1 suggested, the rise in women's share of the nonagricultural labour force among high growth or semi-industrialized developing economies in the past few decades, is, at least in part, due to the growth in manufacturing trade and export processing in the developing world, sectors which employ a largely female workforce.<sup>28</sup> Increases in women's employment have also occurred among exporters of so-called "non-traditional agricultural exports" (NTAE) or high value agricultural exports (HVA), such as horticultural products and cut flowers<sup>29</sup> as well as in countries engaged in the more traditionally feminine aspects of the services trade such as lower-paid and lower-skilled work in data entry and call centers (Seguino and Grown 2007).

The emergence of "global production/value chains" is an important feature of structural changes in the global economy that has critical labour market implications. These global production chains are not entirely new (Ghosh 2009). However two major changes seem to have increased the relocation possibilities in international production: first, technological changes have allowed different parts of the production process to be split and geographically separated; second, organizational changes have also been associated with the concentration of ownership and control as well as greater dispersion and more layers of outsourcing and subcontracting<sup>30</sup> of particular activities and parts of the production process (Ghosh 2009). Past research in Asia, Latin America and Africa has documented the emergence of international suppliers of goods who rely less and less on direct production within a specific location and more on subcontracting a greater part of their production activities. This has been strongly associated with the increase in manufacturing production for export in a range of developing countries, especially in textiles and garments, computer hardware, consumer electronics and related sectors, as well as in food production.

### Non-traditional agricultural exports

The economic restructuring associated with globalization and liberalization has reshaped the composition of global agricultural trade, inducing a shift from basic commodities such as grains, cotton and tobacco toward a differentiated set of HVA or NTAE such as cut flowers, fruits and vegetables (Dolan and Sorby 2003).<sup>31</sup> A distinction often made in the literature is between, (i) modalities of NTAE production that affect rural households through *product markets*, which are deemed to be less gender-egalitarian, and (ii) NTAE production that affects rural households through *labour markets*, considered to be potentially more gender-egalitarian (Maertens and Swinnen 2009).

One important illustration of the former is the institution of contract farming, analogous to outsourcing in manufacturing (Dolan 2001). This is a form of vertical coordination between export firms and growers, who range from smallholder farmers to large-scale farms.

<sup>28</sup> Standing 1989, 1999; UN 1999; Joekes 1995.

<sup>29</sup> Deere 2005; Zammit 2008; Whitehead 2009.

<sup>30</sup> Subcontracting can be defined as the manufacture of goods by one firm for another on the specification of the lead firm (Hale and Shaw 2001).

<sup>31</sup> The term NTAE is used in the literature to describe three distinct phenomena. First, an export can be nontraditional because it involves a product that has not been produced in a particular country before, such as snow peas in Guatemala. A second type of nontraditional export is a product that was traditionally produced for domestic consumption but is now being exported, like various tropical fruits. Finally, the term can refer to the development of a new market for a traditional product, such as exporting bananas to the Soviet Union (Barham et al. 1992:43).

Contracting smallholders, for example, are thereby involved in the production and delivery of NTAEs to export companies/buyers, for which they may obtain access to certain inputs or technology. As Dolan (2001) explains, contract farming allows firms to exert control over the production process without the burden of owning or operating the farms.

Female farmers are often excluded from formally contracting with agro-industrial firms for the delivery of NTAE, allegedly because they lack statutory rights over land, and given their limited access to family labour, capital and technology (Maertens and Swinnen 2009). Women, however, are under pressure from their husbands to supply the unpaid family labour needed for the production of NTAE, such as French beans in Kenya or vanilla in Uganda (Dolan 2001; Dolan and Sorby 2003). This can give rise to intra-household conflicts over land, women's labour and proceeds from the sale of crops; it can also entail an intensification of women's work, resulting in longer working hours, as well as the diversion of women's labour from food to export crop production (Dolan 2001). In general, the existing literature provides a relatively negative assessment of the gender implications of contract farming. It also points to the need for more research on the alleged implications of contract farming for basic food production and household food security.

Alternatively where high-value supply chains are characterized by contracting with large commercial farms or vertically integrated estate production, or if labour-intensive post-harvest processing is needed, then local households can be integrated through employment and labour market effects. These corporate farms tend to employ a highly feminized workforce (see table 3). This is the case in several Latin American countries, in particular Chile and Mexico which were among the forerunners in this field, as well as in South Africa, Thailand, and several other African countries producing cut flowers for export (for example, Kenya and Uganda). The assessment of gender implications of agro-industrial employment have been more contested. While several studies draw attention to the reproduction of gender inequalities in NTAE labour markets, seen as bearers of gender,<sup>32</sup> others (e.g. Maertens and Swinnen 2009) see women's disproportionate presence as workers in agro-industry as a positive development, especially in view of the paucity of off-farm employment opportunities for women.

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<sup>32</sup> For example, Dolan and Sorby 2003; Barrientos and Kritzing 2004; Deere 2005.

**Table 3: Employment characteristics in non-traditional agricultural exports (NTAE): Selected countries**

Country	Commodity	Share of female employees (per cent)	Number of employees	Year of survey
Kenya	Cut flowers	75	40,000–70,000 (+4–5,000 smallholders)	2002
	Fruits and vegetables	66	2,000,000	2002
Uganda	Cut flowers	85	3,000	1998
Zimbabwe	Cut flowers	87	27,000	
Colombia	Cut flowers	64	70,000 (+ 50,000 in packing industry)	
Ecuador	Cut flowers	70	30-50,000	
Thailand	Poultry	80		
Chile	Fruit	45	336,739	
Brazil	Fruit	65		
South Africa	Fruit	53	280,000	1994
Mexico	Vegetables	80–90		
Cameroon	Fruit		10,000	2003
Cote d'Ivoire	Fruit		35,000	2002
Senegal	French beans	90	12,000	
	Cherry tomatoes	60	3,000	
Zambia	Vegetables	65	7,500	2002–2003
	Cut flowers	35	2,500	2002–2003

Source: Dolan and Sorby 2003 (tables 3.3, 3.9, 4.1); Maertend and Swinnen 2009 (table 1).

Carmen Diana Deere's (2005) review of the case study literature on NTAE from Latin America draws out a number of useful findings.

- The labour-intensive tasks of NTAE production employ a large contingent of women workers for the same reason that they were employed in the most labour-intensive traditional export crops: women constitute a source of cheap labour that can be drawn upon seasonally.
- Occupational segregation is maintained: just as in the past, there is a tendency for the few permanent jobs that are created in NTAE production to be reserved for men, with women concentrated in temporary and seasonal jobs and employed on a casual basis. A similar gendered ideology continues to define the employment of women as secondary workers, whose primary responsibility is in the domestic realm. Thus they can be drawn upon seasonally as befits the needs of export production.
- Low wages continue to be maintained by the employment of women for the agricultural tasks that are remunerated on a piece-rate basis. This form of remuneration encourages the participation of the whole rural household, overcoming whatever cultural resistance may be at play regarding rural women's economic participation outside the home. It also increases self-exploitation.

What appears to be new in terms of women's participation in field work for NTAE production is the spatial dimension. Whereas women have always participated in local agro-export harvests in most countries, in the past they have rarely been among the contingents of highly mobile seasonal workers that follow the harvest from region to region (largely due to their responsibility for domestic, reproductive, and subsistence work). With the growth of landlessness and falling real wages, whole families are now among the temporary agricultural migrants, particularly in Mexico, where seasonal rural-rural migration has a strong ethnic dimension. As Lourdes Arizpe and colleagues noted, "in order to achieve the same purchasing power as was given by the father's wage in 1975, in 1985 the father, the mother and one child have to find paid employment" (Arizpe et al. 1989:258, cited in Deere 2005).

The widespread recruitment of women as temporary contract workers on a seasonal and casual basis has been noted by other studies as well.<sup>33</sup> Given the highly seasonal demand for workers in these industries, employers have developed what Catherine Dolan and Kristina Sorby call a “dual employment strategy” to manage risk, “consisting of a ‘nucleus’ of skilled, permanent workers and a periphery of ‘flexible’ relatively unskilled workers (2003:29). Drawing on micro-level data from numerous case studies in Africa, Asia and Latin America, Dolan and Sorby (2003) show that the use of flexible labour follows gender-based patterns, with women largely crowded into the more vulnerable forms of work (casual, temporary and seasonal), and men concentrated in the fewer permanent jobs. The casual, temporary and seasonal workers do not usually have a written contract, nor are they enrolled in any social security system (for health insurance or retirement benefits). Other noteworthy features are the low levels of unionization; excessive compulsory overtime and lack of childcare facilities; and exposure to work-related health risks due to the use of highly toxic substances. Several studies note that the recruitment of female casual labour through labour contractors dilutes responsibilities when there are work accidents and abuse of workers and helps bypass labour laws and company codes (Bain 2010).

While Maertens and Swinnen’s (2009) survey data from Senegal partially confirms gender bias in the recruitment of men into permanent positions (at least in one of two regions where they carried out their survey), they take the fact that *both* women and men in the second region are employed as casual and temporary workers, and the fact that wages are more or less equal for women and men casual workers in both regions to be indicative of the absence of gender bias and discrimination. Moreover, given the paucity of off-farm employment opportunities for women, at least in the regions where they conducted their survey, and the positive externalities (in terms of child welfare for example) likely to accrue from women having a source of income, their overall assessment of female employment in NTAE production is positive.

On the questions of labour conditions in NTAE production, which remains a highly contested one, section 5 will consider some of the spaces for activism that these global production chains have offered NGOs and trade unions.

### Garments and Textiles

Until a couple of decades ago, the textile and garment industry provided a significant number of jobs for large numbers of women in the advanced industrialized countries, but met with increasing competition from garment production in the lower-wage East Asian countries (Zammit 2008). Subsequently, under the quota system that was brought into effect in 1974 under the Multi-Fibre Agreement (MFA) to protect the advanced industrialized countries from what was seen as excessive import penetration, export-oriented garment and textile production was established in a wide range of developing countries. After the phasing out of MFA in 2005, and in conformity with the new WTO free trade rules, production and exports expanded further afield, particularly in India and China, but also in a range of other low-income developing countries. One constant in this pattern of continual global relocation has been the predominance of women; globally women make up 74 per cent of the garment industry workforce, making it a truly women’s industry (Hale and Shaw 2001, citing ILO 2000).

The other characteristic of the garment industry is that it is controlled by marketing and retail companies that manage a global network of suppliers in low-wage countries. For example, one US retailer is estimated to have over 13,000 suppliers, who in turn source from up to 78,000 subcontractors (Hale and Shaw 2001). There can be several layers of firms or intermediaries between the point of production where workers are located and the end product market. The advantages to companies of subcontracting have been apparent in two key areas: production flexibility and the weakening of labour rights (Hale and Shaw 2001). As Hale and Shaw (2001) explain, the lead firms normally exercise considerable control over the subcontractors in terms

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<sup>33</sup> Appendini 2002; Barrientos and Barrientos 2002; Dolan and Sorby 2003.

of price, quality and timing of the products they supply, but usually have little concern for labour conditions.

There have always been concerns about low wages and adverse labour conditions in the garment industry, especially compulsory overtime, hazardous conditions and lack of legal protection when workers are subjected to harassment and abuse. There is nevertheless the argument, put forward forcefully by Naila Kabeer (1995, 2000), that paid work in the garment factories (in Dhaka, Bangladesh) can provide new employment opportunities for women who have been hitherto confined to home-based forms of economic activity, such as family farming or paid domestic service, with potentially positive implications for the personal choices they are able to make. In this context, she has argued, factory work for women has also helped their households meet basic survival needs, improved their security, and begun a process by which women are being transformed from representing economic burdens on their families into economic assets. Gita Sen (1999) sees the glass as half empty. For her, the fact that young women sometimes voice a preference for this type of work to going back to the confines of rural patriarchal households only emphasizes how harsh the conditions of rural poverty and rural patriarchal dominance are for these women, rather than their choice being a positive indicator of the conditions of work in the factories.

Even if factory work can be empowering by taking women out of the confines of their homes and communities and into the public arena, garment production for export has also produced a considerable amount of homeworking due to the spread of subcontracting arrangements. Adverse labour markets conditions are particularly stark in the case of women homeworkers. An ILO report (cited in Hale and Shaw 2001) estimated that the great majority of formal sector garment enterprises in Asia subcontracted a part of their production to homeworkers. Thus, rather than declining with globalization and trade liberalization, within the garment industry homeworking is actually on the increase due to the spread of subcontracting (Hale and Shaw 2001). However, even in larger factories many employers have adopted ways of removing responsibility for their workforce when orders are low and there is little work, while demanding overtime and increasing work intensity when orders have to be completed: workers may be employed on a casual, part-time and temporary basis, and there is increasing use of intermediary agencies that supply contract labour (Hale and Shaw 2001).

The gender dynamics of garment and textile sectors illustrate some important themes with regard to trade liberalization and women's employment. The relative increase in demand for female labour in export-oriented sectors is not just a matter of expanding the available labour force when male labour is in short supply. With labour costs such a crucial part of international competitiveness in these industries, labour intensive exporters prefer to hire women both because women's wages are typically lower than men's, and because employers perceive women as more "docile" and productive in these types of jobs.<sup>34</sup> Indeed, as evidenced by Seguino's (2000a, 2000b) work on the importance of women's low wages in East Asia's export record, the very success of labour-intensive export performance can largely depend on restraining wage growth in export industries (see also box 1).

Moreover, any "comparative advantage" that women may have (compared to men) because of their relatively lower wages, seems to disappear when industries upgrade and employers substitute a largely male workforce for their hitherto female workforce. This process of substitution, referred to as the de-feminization of manufacturing employment, has been documented for Mexico and several countries in East Asia (UN 1999; Bratchet-Marquez and de Oliveira 2004).

Another worrying trend which has been documented by UNCTAD's annual *Trade and Development Reports* (see UNCTAD 2007) can be summarized as "the fallacy of composition": as more countries have sought to expand their exports of (labour-intensive) manufacturing

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<sup>34</sup> See Elson and Pearson (1981) for an early elaboration of this hypothesis.

commodities, this has contributed to driving down the prices of those goods on the global market (their terms of trade), and thereby constrained the types of improvements in wages and working conditions that could have been made. This dynamic is especially damaging for women because some of women's employment tends to be concentrated in the types of industries that are the most exposed to international competition (Berik and Rodgers 2009).

Finally, the positive association between trade liberalization and increasing female employment is strongest in labour-abundant semi-industrialized countries. In primarily agricultural economies without large NTAE industries, as in many parts of sub-Saharan Africa, where women are concentrated in import-competing agricultural sectors like food crops, men are better situated to take advantage of export opportunities in cash crops or natural resource extraction and women can lose employment and income as a result of trade liberalization (Whitehead 2009). Also, in developing economies with less competitive manufacturing sectors, particularly in Africa, tariff reductions on labour-intensive imports have resulted in higher job losses for women than for men (Seguino and Grown 2007).

The extreme competitiveness in labour-intensive export industries and the increasing ease of moving production from one locale to another, set serious limits on trade liberalization as a vehicle for improving women's wages and labour market conditions.

- Women have been highly visible during the rapid growth of labour-intensive, export-oriented production. In countries where trade liberalization has facilitated the growth of export-oriented horticultural and manufacturing industries, women have made up a significant share of the workforce. This trend is therefore partly responsible for the increase in female labour force participation noted earlier.
- On the positive side, the ability to earn an independent wage may have facilitated personal paths of empowerment for some women workers.
- However, the structural conditions in these global production chains, marked by ever more competitive subcontracting arrangements, have made it very difficult for women workers to see improvements in their wages and working conditions (see Section 5 on opportunities for activism in this area).
- In countries where industries have up-graded their products (such as Mexico, South Korea) it has been difficult for women to maintain their jobs, leading in some cases to the de-feminization of manufacturing employment.

In other countries, with less competitive industries, tariff reductions on labour-intensive imports have resulted in higher job losses for women than for men.

### ***Fiscal constraint and public sector employment***

Governments in many countries, both developing and developed, have been under pressure in recent decades to reduce the scope and size of government. In the 1980s and early 1990s, the idea that held sway was that public expenditure "crowded out" private investment. At the same time, many developing country governments also experienced the erosion of their revenue base as trade liberalization led to the falling rate of tariffs on imports and exports. Between 1993 and 1998, for example, India reduced average tariffs from 71 to 35 per cent; in 1998, however, a new government had to raise tariffs, claiming that this was not to protect business but to protect government revenue (UNRISD 2000:33). In the 1990s, low-income countries tended to rely more heavily on trade taxes (because customs duties are easier to collect than direct and indirect taxes) compared to middle- and high-income countries whose main sources of government revenue came from direct and indirect taxes and social security payments (UNRISD 2000: figure 2.4).<sup>35</sup> This had significant implications for the government's capacity to fund social programmes. In sub-Saharan Africa,<sup>36</sup> for example, public expenditure as a percentage of GDP declined from 25.5 in 1980 to 22.3 in 1997, and in South and East Asia from 29.4 to 26.2 per cent over the same period (UNRISD 2000: table 4.1).

Many would argue that the period of state roll-back and retrenchment which marked the "high neoliberalism" (Molyneux 2002) of the 1980s and early 1990s was superseded in the late 1990s

<sup>35</sup> Governments nervous about taxing businesses have increased taxes on consumption, particularly through value-added taxes. The latter are generally regressive in terms of both class and gender, though the extent to which they are regressive depends on exemptions of basic goods and services (Huber 2003).

<sup>36</sup> The figure for sub-Saharan Africa excludes South Africa.

by a shift in mainstream thinking that recognized that effective governance was not about shrinking the state.<sup>37</sup> The need for social expenditure—now recast as “social investment” (Jenson and Saint Martin 2006; Jenson 2010)—was also increasingly recognized by global policy-making institutions. Section 5 of this paper will analyse the ways in which social expenditure and social protection programmes have evolved since then. Here we will briefly look at public sector employment which has tended to be a source of relatively “good jobs” for women.

### Public sector employment

Changes in public sector employment as a result of privatization are related in part to fiscal constraints and the accompanying pressures on governments to both raise funds and reduce subsidies paid to loss-making enterprises. Another contributing factor has been at the ideational level, where the need to create a leaner and more efficient state has gained prominence.

It is useful to differentiate between two distinctive effects of changes in public sector employment in the context of reforms: (i) the impact of privatization of state-owned enterprises (SOEs), and (ii) the impact of the decline in the size of the public sector overall (Braunstein 2012). Privatization of SOEs is almost always associated with decreases in employment (Birdsall and Nellis 2003). Based on (albeit fragmentary) evidence of what happens to workers after they lose their SOE jobs, it seems that new jobs are characterized by a lengthening of hours of work and reductions in fringe benefits and job security (Birdsall and Nellis 2003). Overall, at least in the short-run, it is likely that privatization worsens income inequality (Birdsall and Nellis 2003). Thinking in terms of differential effects on women versus men, since the majority of SOEs are capital-intensive, the impact of privatization on women’s employment is likely to be less than its impact on men’s (Birdsall and Nellis 2003; Heintz 2006). China may be an exceptional case both in terms of women’s presence in the SOE workforce, and in terms of the gender effects of industrial restructuring. In 1993 the official trade union found that women workers accounted for 37 per cent of all state workers but 60 per cent of those laid off and unemployed. By 1999 women accounted for 45 per cent of all laid-off workers (Lee 2005).

The decline in the size of the public sector overall, however, is harder on women (compared to the decline that women experience when SOEs are privatized). We know that women have historically constituted a significant share of public sector workers in many countries (often higher than their share in total employment)—ILO data confirm this and show that for the countries for which they have data, women constituted 35 per cent of public employees in developing countries, 46 per cent in transition countries, and 50 per cent in OECD countries (Hammouya 1999). Hammouya (1999) also presents data that show that government employment either declined faster or grew more slowly than private employment in most countries during the 1990s. The reduction in public sector employment has been particularly noticeable in the transition economies of Eastern Europe and Central Asia. Hammouya (1999) also underlines the role of public sector employment as a particularly important source of formal sector jobs for women. Therefore, government downsizing would have a disproportionate impact on formal employment opportunities for women and would increase women’s concentration in less formal, non-regular jobs.

In addition to privatizing many public sector activities, governments have also attempted to improve managerial efficiency within the public sector by raising user-charges or rationalizing staff time.<sup>38</sup> An important manifestation of this trend can be found in the public welfare and social services.

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<sup>37</sup> The neoliberal reform agenda was criticized by some of its own architects for its failure to unpack the different dimensions of “stateness” and distinguish between state scope and state strength (Fukuyama 2004).

<sup>38</sup> This has been attempted through a number of reforms including decentralized management, executive agencies, quasi-markets, performance contracts and contracting out of services to the private sector or NGOs (for example to manage hospitals or prisons, and deliver social services).

For South Africa, for example, Francie Lund (2010) shows that better pay and working conditions in the private sector has underpinned the movement of nurses from the public to the private sector there. For sub-Saharan Africa more broadly, Mackintosh and Tibandebage (2006) suggest that the private sector health services, which became widespread in urban areas in the 1980s and 1990s, are largely unregulated and of dubious quality. They also argue that very little is known about women's work conditions in the private health sector: expensive private clinics may provide nurses with better working conditions than the public sector, but wages and working conditions can be worse in the small-scale private sector than in the urban public sector (Mackintosh and Tibandebage 2006). A more general trend across Africa is that the liberalization of private practice alongside severe deterioration in the funding of the government sector has created strain and demoralization for many nurses working in public sectors (Mackintosh and Tibandebage 2006). While nurses and other health workers in the public sector are formal workers/civil servants, and as such entitled to benefits in the form of pension contributions and travel allowances, their wages and working conditions have significantly deteriorated in recent decades as in Tanzania (Meena 2010).

At the same time, as in Europe,<sup>39</sup> there is also a trend toward outsourcing of some of the functions that may have been carried out by the state to non-state entities. Social programmes attending to welfare and care needs would not function without the participation of community-based and non-profit organizations (NPOs). Further, in many lower income countries even public social services have come to rely heavily on "voluntary" or "community" work—as in the case of Home-Based Care (HBC) "volunteers" in health care delivery for AIDS patients—very often a short-hand for unpaid or underpaid work by women (Lund 2010; Meena 2010).

The attraction to cash-strapped governments of partnering with NPOs for the provision of welfare and care is understandable, given that public subsidies frequently make up only a fraction of the full cost of services that these organizations provide. But there is a limit to the costs workers in these organizations can absorb through self-exploitation without negative implications for their own health and well-being, and for the quality of service that they are able to provide. Contrary to the view of the state as a "good employer", many of these programmes show a state which deliberately side-steps its own labour regulations by "employing" workers who are not even counted as part of the labour force (see also discussion on care services in section 6). There is, however, emerging evidence from several Latin American countries such as Brazil, Ecuador and Uruguay, of the expansion of public sector employment. In Ecuador, for example, the expansion of public employment has occurred not just because more people are hired to deliver public services, but also by eliminating contractors and outsourcing of public employment, "thereby providing around half a million previously outsourced workers with more stable conditions and better wages" (Ghosh 2012:42). These recent developments deserve much greater scrutiny, especially as a means to promote better outcomes in Latin America and globally.

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<sup>39</sup> In Europe while the nation states are assuming greater responsibility for welfare, this does not necessarily mean shifting away from the family, nor does it mean that the state itself undertakes the care (Daly 2011). Where care services are being provided, it is mostly as a mixture of voluntary and commercial provision. The role of the voluntary and commercial provision is likely to expand further in the current post-crisis context in countries such as the United Kingdom where public expenditure is being massively cut back (Women's Budget Group 2011). This is likely to have adverse effects on the working conditions of those who deliver welfare services.



Governments in many countries, both developing and developed, have been under pressure to reduce the scope and size of government; this had major knock-on effects on public sector employment.

- It is useful to differentiate between two distinctive effects of changes in public sector employment in the context of reforms:
  - i. the impact of privatization of state-owned enterprises (SOEs), and
  - ii. the impact of the decline in the size of the public sector overall.
- The privatization of SOEs almost always causes decreases in employment, while remaining jobs see lengthening of hours and reductions in benefits and job security for both men and women alike.
- Since the majority of SOEs are capital-intensive and employ relatively more men, the impact of privatization on women's employment is likely to be less than its impact on men's.
- Because of the role of public sector employment as a particularly important source of formal sector jobs for women, the decline in the size of the public sector overall has had a disproportionate impact on formally employed women.
- In addition to privatizing many public sector activities, governments have also tried to improve managerial efficiency within the public sector by raising user charges, rationalizing staff time, and outsourcing some services
- The impact on the working conditions of front-line service providers, many of them women (such as nurses in public hospitals), has been unfavourable

### *Transnational labour flows and gender*

While globalization is often associated with the movement of labour across national borders, this is not because countries have liberalized their migration policies to facilitate such flows. In fact, the movement of persons, unlike that of capital and goods, has been increasingly constrained in the current era of globalization, and many countries have adopted measures to select the type of migrants that they need/want. Such restrictions have been reinforced in the context of the 2008 global crisis. As austerity measures are taken to cut benefits, diminish health and education services, and make jobs more temporary, even mainstream political parties, and not just the far Right fringe parties, are finding it acceptable to stress the “threat from immigration”, thereby giving credibility to populist racism (Zizek 2010).

Global inequalities in income have been one impetus for the movement of people across national borders. While the movement of labour has not been liberalized to the extent that trade and finance have been, globalization has nevertheless been marked by an increasing propensity for people to move across borders in stratified streams. Women (both high-skilled and “unskilled”) constitute an increasing proportion (51 per cent by 2000 according to ILO data cited in Piper 2008) of cross-border labour flows. Included in these streams are increasing numbers of women who engage in paid care work—domestic workers, nannies and nurses among them. We focus on these particular groups of women workers—rather than IT professionals, bankers and doctors here—due to concerns about their labour market disadvantages, and because they are likely to constitute a significant share of all women from developing countries who migrate in search of work. Other groups of relatively disadvantaged migrant women include sex workers and agricultural labourers.<sup>40</sup>

The literature on migration documents the economic pressures that have pushed many women (some of them highly educated and qualified) to leave their own children and kin behind in order to take care of children and the elderly in the richer countries: high rates of structural unemployment, livelihood crises, and the commercialization of welfare services (which means that many are turning to fee-paying education and health services for which they need higher levels of income). The factors pulling these women into the more affluent countries include the increasing tendency by women in destination countries to seek paid work which leaves a care deficit in its wake that has to be met, population ageing, the shortage of affordable care services for children and the frail elderly, and limited change in men's roles. The global movement of domestic workers and nannies is not only creating a “surplus” of care in richer countries (and a

<sup>40</sup> There is not a significant body of research on migrant agricultural workers, but the few studies that exist (see Bryceson 1999, Adams 1991) suggest that the welfare conditions of migrant agricultural labour are often poor, since they lose access to their own farms and do not have year-round guaranteed employment in their places of destination. For example, casual workers in sugar cane fields and factories in Zimbabwe were able to find work only periodically so that they had to find other income sources the rest of the time, which included selling sexual services (Adams 1991 cited in Whitehead 2009).

possible deficit in poorer countries), but is also shoring up male-dominated hierarchies within families and inadequate state response to rising care needs (Hochschild 2000; Yeates 2004).

In contrast to domestic workers, nannies and sex workers who are considered to be unskilled and whose migration and employment very often remain undocumented and unregulated, nurses are defined as being part of the skilled work force, and both their migration and employment is more intensely regulated by states and commercial, professional and labour interests (Yeates 2010). However, beyond the individual nurses and their families who may benefit from the higher earnings obtained, the major benefits from nurse migration accrue to the health system of the destination country,<sup>41</sup> while the costs are largely borne by the health care system of the country at the other end of the global nursing chain.

Health worker migration has deleterious effects on health care provision in many poorer countries of origin, with the costs extending beyond the loss of investment in educating and training of the nurse, to include health deficits caused by the migration of nurses and the effects of a depleted health service on its development prospects (Yeates 2010). Such deficits are particularly stark in African countries which are also coping with the additional care burden associated with the HIV/AIDS pandemic. In Tanzania, for example, hospitals and health centres are increasingly collapsing under the care demands imposed by the pandemic, in a context of severe resource constraints, unable to retain the nursing workforce that they so desperately need (Meena 2010).

Overall then while there is some benefit yielded to the sending country and individual households by the remittances sent by individual migrant workers, it cannot be confidently declared that remittances counterbalance the wider economic and social losses resulting from out-emigration, for developing countries. The global migration of nurses can therefore be seen as yet another factor that feeds into the vicious circle of inequality (in care and social development) on a global scale, pulling the poorer and less powerful countries even further apart from the destination countries that have the resources and power to attract and absorb skilled care workers.

The movement of labour across countries has not been liberalized in the era of globalization when the flow of goods and finance across borders has been greatly eased through policies of trade and financial liberalization.

- Nevertheless, global inequalities in income and uneven development have prompted the cross-border movement of people, including a significant proportion of women.
- Economic pressures in the home countries, and the demand for care workers in more affluent ones, have pushed many women to join both South-South and South-North flows.
- The global movement of domestic workers, nurses and other carers creates a “surplus” of care in richer countries, and often a deficit in poorer ones.

Migration may benefit the individual nurse or domestic worker and her family (whose earnings increase), as well as supplementing the health/care systems of the destination country; the costs of migration, however, are largely borne by the health/care system of the country at the other end of the global migration chain.

#### **4. Labour Market Informalization: Scale of Change, Underpinning Causes and Remaining Questions**

Section 3 outlined a number of mutually reinforcing macroeconomic policy channels which tend to dampen employment generation and trigger labour market informalization: the liberalization of trade which can displace employment geared to the domestic market and/or encourage export-oriented production processes subject to competitive pressures where labour costs have to be kept low; finance-related crises in the context of financial liberalization and their disruptive effects on employment, including the tendency of such crises to facilitate labour

<sup>41</sup> The higher level of income may come along with de-skilling as highly trained nurses from developing countries can experience a considerable degree of downgrading in the destination country due to non-recognition of qualifications and work experience.

market informalization; inflation targeting and its negative effects on employment generation; and the decline in formal sector public employment and the tendency toward “outsourcing”.

Drawing on such findings, a number of studies on informal employment make a direct causal link between globalization/liberalization and informalization.<sup>42</sup> In contrast to this explanation, which sees informalization as arising from neoliberal economic policies, there is what Heintz and Pollin (2003) refer to as the “overregulation-centered theory” of informalization—an approach that is commonly associated with the work of Peruvian economist Hernando de Soto. According to this theory, informalization reflects the attempt by entrepreneurs to escape excessive state regulation (Heintz and Pollin 2003:6). By operating informally, so the theory goes, entrepreneurs can free themselves from binding state regulations that are time-consuming and costly.

This overregulation-centred approach does generate some useful insights into how a regulatory regime can create pressures toward informalization. But how useful is it for explaining the current (i.e. post-1980) phase of labour market informalization (Heintz and Pollin 2003)? In fact the general thrust of labour law reform over the past two decades has been to make labour more “flexible” and to reduce the application of labour laws and standards (on social protection, for example, or on minimum wage) (Standing 2010; Lee 2005). In other words, pro-labour government regulation has been weakening over the past two decades, especially in most developing countries. The incentives for capital/entrepreneurs to circumvent state regulation should also therefore have diminished. Thus de Soto’s argument is not very convincing. In fact it only reinforces the question of why informalization has grown at a time when the “restrictions” on capital in the form of state regulations—and hence the incentives for escaping them—have been weakening?

From another perspective, informal employment is frequently seen as the outcome of slow growth and economic sluggishness, associated with the globalization agenda. This statement however needs to be qualified. Even though there is an inverse relationship between the informalization of labour and economic growth, informal employment has been growing not only in contexts of low economic growth but also where rates of growth have been modest or good, suggesting a more complex relationship between the two (Heintz and Pollin 2003).<sup>43</sup> In the case of India, for example, the entire net employment increase between the high-growth years 1999–2000 and 2004–2005 has been that of informal workers (Srivastava 2008). This suggests that informal forms of paid work are not just “lingering vestiges of backwardness” (Heintz and Pollin 2003) or a by-product of economic stagnation. In fact, in some contexts, the very growth of global production chains and networks made possible by the expansion of foreign direct investment has generated informal production processes, through outsourcing and subcontracting as section 3 suggested.

Hence, the term “informal employment” captures very different kinds of employment, some more akin to survival strategies with low returns that people resort to when economies stagnate. Other kinds of informal work (piece-rate, wage work) are integrated with and contribute to processes of accumulation on a national or global scale (as is the case with industrial outworkers, for example). Research on a selected number of developing countries has shown that workers in informal employment earn less, have more volatile incomes, lack access to basic public services and protections, and face higher risks of poverty compared to workers in formal employment (Chen et al. 2005).<sup>44</sup> For example, if the earnings of a formal sector non-agricultural wage worker in the private sector is 100, then the earnings of an informal wage worker in the private sector is between a low of 49.6 (in South Africa) and a high of 77.4 (in

<sup>42</sup> Beneria 2001; Chen et al. 2005; Heintz and Pollin 2003; Standing 1999.

<sup>43</sup> Evidence for the inverse relationship between economic growth and informalization is available in the paper by Heintz and Pollin (2003).

<sup>44</sup> This publication (*Progress of the World's Women 2005*) drew on detailed labour force data for three lower-income countries (El Salvador, Ghana and India) and three middle-income countries (Costa Rica, Egypt and South Africa).

Egypt). The following sub-section will show that women are often over-represented in the most casual and low-earning segments of the informal economy.

However, this analysis is based on a static snap shot of the labour market, and does not therefore show a global trend over time in increasing informalization. It is difficult to show long-term trends in informal employment—as it is now defined (see box 2) in accordance with the new international definition—because reliable statistics based on this new definition are often not available.

Statistics on the narrower and older concept of employment in the informal sector (see box 2) are more readily available. For example, the ILO regional office for Latin America and the Caribbean in Lima, Peru collects such data and publishes estimates in its *Panorama Laboral*. As might be expected, the estimates in the *Panorama Laboral* typically use the size of the enterprise to distinguish informal firms from formal ones. Drawing on Heintz (2008),<sup>45</sup> we reproduce in table 4 some estimates of different types of employment in the informal sector and employment as domestic workers (the majority of paid domestic work can typically be considered informal), disaggregated by sex, for Brazil and El Salvador.

**Table 4: Employment in the informal sector and as domestic workers, Brazil and El Salvador, 1990–2005**

		Informal Sector				Other			
		Own-account		Contributing family		Wage employee		Domestic workers	
		M	F	M	F	M	F	M	F
Brazil	1990	18.9	18.4	1.9	3.2	12.9	7.9	0.4	6.5
	1995	23.8	20.0	3.5	5.8	16.7	8.5	0.8	8.6
	2001	24.1	17.4	2.5	4.8	16.7	9.5	0.8	8.6
	2005	23.7	18.1	2.1	4.1	16.0	9.4	0.8	8.5
El Salvador	1990	18.7	37.1	4.6	8.8	18.7	7.5	0.0	13.0
	1995	17.7	35.3	3.5	7.7	14.5	6.1	0.5	9.1
	2000	17.5	35.0	3.1	6.3	19.0	8.4	0.4	8.2
	2005	19.6	34.6	5.9	9.0	18.4	8.1	0.7	7.2

Source: Panorama Laboral 2006 (ILO, Lima) cited in Heintz (2008).

In the case of Brazil, employment in the informal sector seems to have increased between 1990 and 1995—the period under which the reforms of the *real* programme were first implemented. Since that time, employment in the informal sector has remained at this higher level, falling slightly between 2001 and 2005. A similar pattern can be observed with regard to employment of paid domestic workers. Women’s employment in the informal sector has generally risen and fallen along with men’s—the one partial exception being paid employees in informal enterprises, in which there seems to have been a recent feminization. While it is not possible to provide detailed and comparable data for the post-2005 period yet, it is important to note that there is emerging evidence of significant progress in Brazil in formalizing informal work. Data from the Monthly Employment Survey (PME) of six metropolitan areas in the country shows that the share of salaried workers without a registered labour contract in the employed population had fallen from 19.7 per cent in October 2008 to 18 per cent in October 2010, and the share of self-employed from 18.5 per cent to 18.3 per cent (ILO 2011d). This has been largely attributed to more inclusive patterns of economic growth that has fuelled domestic demand as well as specific policy interventions that have simplified business registration and lowered taxes for medium-, small- and micro-enterprises. At the same time the government has

<sup>45</sup> The data analysed by James Heintz (2008), based on national labour force surveys, fed into chapter 4 of the UNRISD flagship report on poverty (UNRISD 2010).

improved labour inspection, improved the efficiency of its tax collection and increased awareness of workers' rights (ILO 2011d).

In the case of El Salvador, employment in the informal sector exhibits a noticeable decline from 1990 to 1995. The peace accord ending the civil war was signed in 1992—the fall in informality may therefore be a result of the restoration of a degree of political and social stability. Since 1995, employment in the informal sector appears to have begun to drift upward. Employment as paid domestic workers has fallen as a share of women's total employment. Similarly, the share of female own-account workers in total women's employment has fallen. However, the share of contributing family workers (unpaid) has risen. This may suggest that more women are increasingly employed in more precarious forms of self-employment, with limited autonomy, control over income, and earning potential.

Although credible labour market data for South Africa has only existed for the past 15 years, Daniela Casale and Dorrit Posel (2005) provide a summary of notable labour market trends. Women's share of total employment has increased since 1995, indicating that women's employment has grown faster than men's. However, they also show that women's unemployment rates have also increased at the same time. The increase in women's employment has meant that some women have made in-roads into more favourable occupations—such as professional employment. For example, Casale and Posel find that professional employment increased by 90 per cent for African women over the period 1995 to 2003 and by 130 per cent for white women. Similarly, the number of women in formal self-employment more than doubled over the same time period. Nevertheless, informal self-employment and employment as paid domestic workers account for a significantly larger share of the overall increase in women's employment. Table 5 reproduced from Casale and Posel (2005) summarizes these trends.

**Table 5: Selected employment trends in South Africa, 1995–2003, disaggregated by sex**

	Male			Female		
	1995	2003	Per cent change	1995	2003	Per cent change
Employees	4,599	4,903	+7	2,610	3,096	+19
Informal self-employment	216	681	+215	184	763	+315
Formal self-employment	237	390	+65	65	131	+102
Domestic workers	21	45	+114	689	970	+41
Unskilled agriculture	689	347	-50	193	182	-6
Multiple jobs	96	66	-31	44	45	+2
TOTAL	5,858	6,433	+10	3,785	5,188	+37

Source: Casale and Posel (2005) cited in Heintz (2008).

Informal labour relations make up a significant share of the labour market. There is a need for: (i) more comprehensive data sources that capture its diversified nature and differences across time and place; (ii) better understanding of the mechanisms that underpin informality, and (iii) evidence-based policy approaches that are tailored to different forms of informality.

*Data sources on informal labour markets*

- Global trend data on changes in labour market informality over time are very patchy.
- Existing data for selected countries, however, suggests rising levels of labour market informality over time.
- There is a clear need for more standardized methodologies in data collection to facilitate both cross-country and time-series analyses.

*Mechanisms underpinning informality*

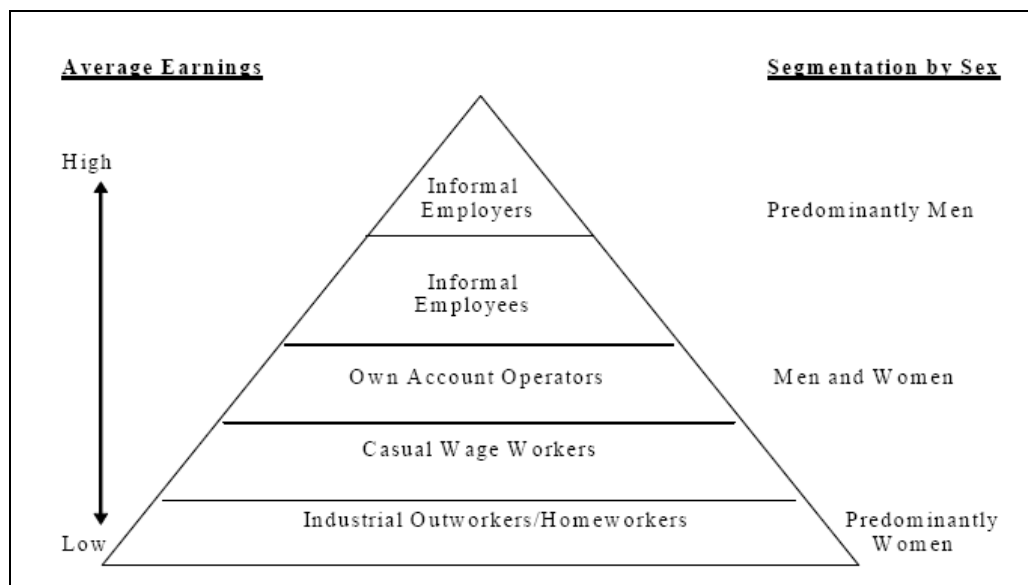
- The idea that informality has grown due to state over-regulation does not stand up to scrutiny: it is counter-intuitive for informality to have increased at a time when pro-labour statutory regulation has been weakened in most countries.
- The mechanisms underpinning labour informality are therefore more likely to have their origins in the kind of structural trends and policies that have been associated with globalization; this includes competitive pressures within export-oriented production processes associated with trade and financial liberalization, recurrent economic crises, public sector reforms triggering outsourcing, and as section 5 will suggest, the decline in the bargaining power of organized labour.

**Gender segmentations in the informal economy**

As section 3 demonstrated, growth paths differ in their ability to generate employment of sufficient quantity and quality. This, in turn, shapes women’s (as well as men’s) prospects of finding work that provides good terms and conditions. Yet, as the global evidence provided in section 1 showed, women generally occupy a more precarious position in the market than men, even in the advanced industrialized countries, due to persistent gender segmentations, discriminatory forces operating within and beyond the labour market, and women’s greater involvement in unpaid reproductive work. The evidence reviewed in this sub-section will show that these gender segmentations are also a distinct feature of informal labour markets.

Figure 8 captures, in a somewhat simplistic way, the gender characteristics of the informal economy: men tend to be over-represented in the top segment of the informal economy (among informal employers); women tend to be over-represented in the bottom segment (among industrial outworkers); and the relative share of women and men in the intermediate segments tends to vary across sectors and countries. Comparable stratifications based on caste, ethnicity and religion, not captured in figure 8, have been shown in other research (Harriss-White 2003; Meagher 2007).

**Figure 8: Segmentation of informal employment, by average earnings and sex**



Source: Chen 2009.

In the absence of global datasets, data from selected countries are presented in table 6, drawing on the most recently available survey data (Heintz 2008). Table 6 describes the structure of employment in terms of employment status, informality status and agricultural/non-agricultural sector, disaggregated by sex. Domestic workers are treated as a separate category of paid employees when the survey data allow separate estimates for this group of workers.<sup>46</sup> These data broadly confirms some of the findings of other studies (ILO 2002; Chen et al. 2005) that have analysed the gender composition of women's and men's employment.

**Table 6: Share of employment by employment status, formality, and sex (population aged 15+), percentage**

	Brazil		El Salvador		India		Kenya		South Africa	
	M	F	M	F	M	F	M	F	M	F
<b>Formal employment</b>										
Paid employee (non-agriculture)	34.3	31.6	28.4	29.9	7.6	3.7	13.6	5.7	58.5	55.2
of which private	27.7	20.1	20.7	22.0	—	—	8.1	2.6	44.1	36.9
of which public	6.6	11.5	7.7	7.9	—	—	5.5	3.1	14.4	18.3
Self-employed (non-agriculture)	2.3	2.2	0.9	0.2	—	—	1.3	1.0	5.1	3.1
Formal agricultural	0.2	0.0	0.5	0.1	0.1	<0.1	2.5	1.3	4.9	2.1
<i>Total formal</i>	<i>36.8</i>	<i>33.8</i>	<i>29.8</i>	<i>30.2</i>	<i>7.7</i>	<i>3.7</i>	<i>17.4</i>	<i>8.0</i>	<i>68.5</i>	<i>60.4</i>
<b>Informal, non-agricultural employment</b>										
Paid employee	18.9	32.5	24.6	21.1	19.1	8.3	14.5	7.6	15.5	21.1
of which domestic workers	0.9	17.0	0.9	9.9	—	—	—	—	0.4	12.2
<b>Own-account</b>	16.9	13.4	13.2	35.9	17.3	7.0	10.3	10.3	6.2	10.6
Employer	3.3	1.9	3.8	2.4	0.9	0.1	1.3	0.6	3.8	2.3
Contributing family	0.9	2.5	2.0	6.8	3.5	6.1	1.3	1.8	—	—
<i>Total informal, non-agriculture</i>	<i>40.0</i>	<i>50.3</i>	<i>43.6</i>	<i>66.2</i>	<i>40.8</i>	<i>21.5</i>	<i>27.4</i>	<i>20.3</i>	<i>25.5</i>	<i>34.0</i>
<b>Informal, agricultural employment</b>										
Paid employee	8.8	1.4	11.1	1.6	18.0	26.2	8.3	3.7	3.2	2.1
Self-employed	9.0	1.6	10.1	0.8	22.1	10.1	24.4	37.1	2.7	3.4
Contributing family	2.7	5.4	4.2	1.0	10.0	37.4	20.9	26.7	—	—
<i>Total informal, agricultural</i>	<i>20.5</i>	<i>8.4</i>	<i>25.4</i>	<i>3.4</i>	<i>50.1</i>	<i>73.7</i>	<i>53.6</i>	<i>67.5</i>	<i>5.9</i>	<i>5.5</i>
<b>Other and unclassified employment</b>										
Production for own-use	2.4	7.1	—	—	—	—	—	—	—	—
Other/unclassified	0.2	0.4	1.2	0.2	1.3	1.1	1.6	4.2	0.1	0.1
<i>Total employment</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>	<i>100</i>

Source: Heintz 2008.

First, focusing on formal employment:

- employed men are more likely to work in formal employment than are employed women, the exception in table 3 being El Salvador;
- wage employment accounts for the largest share of formal employment (as opposed to self-employment);
- the gendered patterns of employment differ between the public and private sectors:

<sup>46</sup> Statistics on domestic workers are included for Brazil, El Salvador, and South Africa. Domestic workers are considered a subset of paid employees in this analysis, not a distinct employment status category.

- for four out of five countries, public sector wage employment accounts for a larger share of women's formal employment than men's (the exception being Kenya); as Section 3 also suggested, public employment generally constitutes a more important source of formal employment for women than for men.
- formal self-employment and formal agricultural employment account for a relatively small fraction of total employment for men and women, although in all five cases men are somewhat more likely than women to be employed in these categories of employment.

To sum up, two important findings emerge from this data: first, informal work constitutes a larger share of women's overall employment than men's; second, work in the public sector makes up a more significant share of women's formal employment than men's.

**Second**, looking at informal employment:

- two categories of employment dominate informal non-agricultural employment: informal wage workers and own-account workers;
- in two of the five countries (Brazil and South Africa), informal wage employment accounts for a larger share of women's employment than men's; this is due to the large numbers of paid domestic workers in these two countries;
- if we subtract the share of domestic workers from the overall share of informal paid employees, then men are disproportionately employed as informal wage workers in all five countries; treating domestic workers separately also highlights the relative importance of women's employment as non-agricultural own-account workers; and
- in India and Kenya, informal non-agricultural employment is relatively more important for employed men than women; this is because women are disproportionately employed in informal agricultural activities.

To sum up, paid domestic work and own-account work are important sources of informal work for women; if we exclude paid domestic work, then men are disproportionately employed as informal wage workers.

The heterogeneity of the employment relationship and working conditions of those who work informally, as well as the segmentations by gender and other identity markers pose enormous policy challenges. There is no "one-size-fits-all" solution to the problem of labour informality given the heterogeneity of informal work. The common policy prescription of "formalizing the informal economy" thus needs to be comprehensive in design but tailored to different forms of informality (Chen 2009). There is emerging evidence from several Latin American countries, most notably Brazil and Uruguay, indicating significant progress over the past three to four years in formalizing informal work (ILO 2011d; Alegre and Filgueira 2009). The evidence needs to be scrutinized more carefully, especially from a gender perspective: has the formalization drive included women informal workers as effectively as men? What policy instruments have worked, and for what types of informality? This is an important area for future research.

To date, the formalization debate has focused primarily on the self-employed in informal enterprises, and often, more specifically, on "micro-entrepreneurs" who hire others (hence, the emphasis on property rights which is supposed to promote entrepreneurship and economic dynamism). At a minimum, the formalization debate needs to distinguish between wage workers in informal jobs and the self-employed in informal enterprises (Chen 2009). As already demonstrated, the main attraction of the informal economy for employers is precisely the absence of labour regulation, allowing lower labour costs. This means that a fundamental policy issue is the absence of regulation and lack of protection for workers as well as workers' lack of voice and political influence.



- Informal labour markets, like formal ones, are structured by gender; in general, women tend to occupy the lower rungs within these stratified structures where earnings are relatively low (such as paid domestic work).
- Two categories of employment dominate informal non-agricultural employment: informal wage work (including paid domestic work) and own-account work.
- In countries where paid domestic work is a major source of employment (such as South Africa), informal wage employment accounts for a larger share of women's employment than men's.
- Otherwise, men are disproportionately employed as informal wage workers, while non-agricultural own-account work and informal agricultural activities make up a larger share of women's employment than men's.
- Given this heterogeneity, policy approaches to the problem of informality need to be tailored to different forms of informality.
- For micro entrepreneurs who hire others, the policy emphasis on property rights may be the right one, but not all informal workers fit this category.
- Wage workers (in informal jobs) and the self-employed (in informal enterprises) are two other important categories that require other policy approaches (for example, better social protection for both, infrastructural support for the latter).

The next two sections will review the effectiveness and limitations of efforts made to strengthen women's labour market outcomes. Section 5 looks at public policies aimed at strengthening social protection mechanisms, which over the past decade has been an area of growing concern and experimentation, both at the national level, as well as within global policy institutions. Section 6 then focuses more specifically on the efforts by civil society groups (including trade unions) and the private sector to address labour market conditions and wages.

## 5. Social Protection Programmes and Economic Security

Given the problematic (albeit varied) inclusion of women into the labour market, this section asks what the evolution and recent reforms of state welfare provisions have meant for women. It looks at a set of initiatives, especially by the state, aimed at addressing women's workers' living standards and economic security in the form of social protection programmes. Access to social protection mechanisms, for example health insurance or maternity leave, has also been high on the agenda of trade unions and women's organizations and movements. In fact, social protection programmes may be put in place by the state in response to the "bottom-up" demands of women workers and other groups of citizens. So the efforts described here should not be seen as simply top-down initiatives by the state.

Social protection has also been moving up the global policy agenda since the early 1990s, in the wake of widespread realization that the neoliberal model had failed to generate growth and reduce poverty and inequality. One of the most audible manifestations of the interest in social protection at the global level is in terms of the ongoing discussions and deliberations about the "Social Protection Floor" championed by the ILO. However, the content of social protection has been, and continues to be, highly contested on a range of questions, including the appropriate role of the state, the degree of responsibility that markets and families should assume, the appropriate interface between economic and social policies, and more fundamentally, the values (universalism, redistribution, social justice) that should underpin public policy.

One of the problems, as previous sections have demonstrated, is that with the move toward more informal and casual forms of labour contract, many of these benefits have been lost or diminished in the case of some hitherto formally employed workers, or never accessed by those who have always been informally employed. Extending social protection programmes and placing them on a secure footing, therefore, must be an integral part of efforts to create socially inclusive development paths.

The basic idea of social security is to use "social means to prevent deprivation and vulnerability to deprivation" (Drèze and Sen 1991:5). Social protection, likewise, is concerned with preventing, managing and overcoming situations that adversely affect people's well-being or

living standards.<sup>47</sup> It includes contingencies such as illness, disability, maternity and old age; market-risks such as unemployment and price volatilities that adversely affect the incomes of farmers or self-employed workers; as well as economic crises and natural disasters (UNRISD 2010).

Social protection instruments encompass social insurance and social assistance programmes. **Social insurance** programmes are typically accessed through employment (usually formal), as in the case of contributory social insurance programmes for health, old age and maternity, or alternatively company-based health plans. These types of programmes can also include “dependents” (children, spouses or partners) under their coverage. Social insurance programmes tend to be gender-blind, meaning that most of their provisions (with the exception of maternity/parental leave) do not treat women differently from men. Yet by assuming full-time, formal, life-long employment as the norm, such programmes implicitly discriminate against women. For example, women who are outside the labour force, or those who work informally, cannot usually qualify for health insurance in their own right. However, in some countries, governments have taken steps to adapt their social protection systems to the transformations in the labour markets, bringing those who are informally employed or self-employed (such as Costa Rica, South Korea) under the coverage of health insurance programmes by making affiliation mandatory and by partially subsidizing their contributions (Mesa-Lago 2008; Kwon and Tchoe 2005).

**Social assistance** programmes, by contrast, provide “non-contributory” benefits, usually to those falling below a certain level of income and/or meeting some other criteria of vulnerability. Because they do not rely on formal labour relationships and previous contributions, social assistance programmes are especially important for low-income countries with large informal sectors (UNRISD 2010). It is not surprising therefore that these programmes have moved to centre-stage in recent years, in the context of global concerns about poverty.

Both concepts have historically been used with reference to developed countries, where the concern has been with temporary income shortfalls and transitory poverty in otherwise relatively acceptable living standards (UNRISD 2010). When applied to developing countries, where poverty is chronic, research has drawn attention to the need to not only tackle sharp declines in income, but also to address persistently low incomes. In such contexts, social protection and security must include not only elements of “protection” (preventing a decline in living standards) but also of “promotion” (enhancing the normal living conditions and dealing with regular deprivation) (Drèze and Sen 1991). Interest in social protection in a development context has been further triggered by recurrent economic and social crises in recent decades, and concerns about poverty and adverse labour market conditions (such as unemployment and informality).

This section focuses on a selected number of social protection programmes that contribute to economic security and the process of social reproduction: pensions for income security in old age; child- or family-centred cash transfer programmes; public works programmes; care leaves and services. More specifically, it asks how these programmes should be restructured, in a context where the workforce embraces not only men but also women whose labour market histories and trajectories have their own specificities. The analysis could have included a number of other critical policy areas such as housing, transport, health and education policies. However due to limitations of space we focused on areas where there have been more policy developments in recent years, especially from a gender perspective. Apart from the fact that all these policy components contribute to the reproduction of labour and hence to the functioning of labour markets, some of the selected policy areas, namely care services and public employment programmes, also have direct implications for employment (by creating new sources of employment). In the case of other policy areas we examine, such as pension programmes and cash transfer schemes, the relationships to employment are more indirect and

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<sup>47</sup> The concept of social protection is broader than social security because it also covers non-statutory schemes (ILO 2001:8).

implicit. Apart from public employment programmes which are explored here, other “active labour market policies”<sup>48</sup> such as skills training and job search programmes are not included, again for reasons of space as well as paucity of such programmes in developing countries.

- Economic security requires not only wages/earnings, but also social protection mechanisms that both tackle sharp declines in income and persistent deprivation.
- With the move toward more informal and casual labour relations and market-driven reforms in the social sectors, access to some of these mechanisms has been lost, diminished, or never gained; gender-specific impediments have further constrained women’s access to social protection mechanisms.
- But in the context of global concerns about poverty, policy interest has also grown in some forms of social assistance; some of these programmes target women.

### *Pension reforms and gender equality*<sup>49</sup>

Providing income security and health for people in their old age is not just a burden or cost to society, as much of the current debate on population ageing frames it. Nancy Folbre (2011) argues that providing security and health in old age should be seen as a public good: “people work harder and better and more cooperatively when they know that they can look forward to reasonable security upon retirement”. The area of pensions is also a highly pertinent one for this paper because it illustrates how gender-based inequalities in employment and work (both paid and unpaid) spill over into income insecurity and deprivation in old age.

In general, women have not been well-covered in pension programmes, whether public or private, even though they have in many countries received a pension as a widow of a male breadwinner. Gender inequality in this area derives from the combination of labour market inequalities, on the one hand, and pension design features which can mitigate or amplify those inequalities, on the other (Arza 2012).

The labour market factors that tend to discriminate against women include, their lower labour force participation rates, more frequent breaks in employment, higher prevalence of part-time and/or informal work, and lower earnings. Moreover, certain pension design features can also work against women: for example, if the eligibility criteria include years of work contribution and if the minimum number of years required to claim benefits is high (say 30 years); in addition, if the formula for calculating benefits depends on asset accumulation (as in defined-contribution systems), then women’s lower earnings and shorter periods in paid employment can work against them. Most of (women’s) unpaid work is inevitably excluded from the reach of pensions in most countries, unless specific measures are in place to provide pension credits for the time taken out to care for a child or other dependent (usually of limited duration), or if a specific pension is put in place for unpaid housekeepers (as Venezuela announced in 2008).

In the 1990s, public pension programmes were reformed in a large number of middle-income countries in Latin America and Eastern and Central Europe, often under the aegis of the World Bank that was promoting the “Chilean model” (of privatized and individualized accounts). The move toward privatization and individualization of benefits has raised new challenges for gender equality.<sup>50</sup> In a nutshell, in fully funded pension pillars, pension benefit levels correspond closely to each individual’s pension savings. The fact that women typically stay in the labour market for fewer years, are more likely to work informally, have lower earnings, and a shorter and more interrupted employment history than men means that on average they save less and hence receive considerably lower benefits. Although a certain degree of redistribution

<sup>48</sup> Labour market policies are defined as policies that provide income replacement and labour market integration measures to those seeking work, usually the unemployed, but also the underemployed and those who are looking for better jobs. So-called “passive” policies are concerned with providing replacement income during periods of joblessness or job search (e.g. unemployment insurance, early retirement), while “active” policies refer to labour market integration through demand- or supply-side measures (for example, labour market training, job creation through public and community work programmes and enterprise creation programmes) (Auer et al. 2008).

<sup>49</sup> This section draws heavily on the background paper prepared by Camila Arza (2012).

<sup>50</sup> Arenas de Mesa and Montecinos 1999; Huber and Stephens 2000; ILO 2001; Arza 2012.

can take place in the public component in multi-pillar systems, contributory requirements (for example, having to contribute a minimum of 30 years) can make these benefits inaccessible to those who fall below the minimum threshold.

Since women's higher life expectancy and lower age at retirement (when applicable) are taken into account in most private systems, women's benefits are further comparatively depressed. Other factors that disadvantage women include, in some cases, the fixed commission on wages for administrative costs which affect workers with low incomes more adversely (among whom women are over-represented), and the difficulties women face in qualifying for a minimum pension. In public systems with defined benefits, there are generally similar gender discrepancies, although life expectancy does not affect benefit levels. While in principle women's disadvantages can be mitigated by generous minimum benefit guarantees and by a weighted benefit formula that favours the lower paid, these features do not always characterize public systems either.

In some countries that had undergone radical reform, for example Chile, the shortcomings of the privatized system were so evident, that by 2005 there was unusual consensus across the political spectrum with respect to the need for reform. Estimates forecasted that more than half of future pensioners, and three quarters of women, would not even accumulate the right to a minimum pension by way of their own contributions (Yáñez 2010 cited in Staab forthcoming).

The second wave of pension reforms taking place in the post-2000 period in Latin America has partly addressed some of these gender issues (Arza 2012). This includes the creation or strengthening of a government-financed solidarity pillar to enhance the pensions of workers with some contributions but low pensions (in both Bolivia and Chile); the adoption of gender-neutral mortality tables for the calculation of benefits in individual accounts (Bolivia); the elimination of fixed fees on individual accounts (Chile); and the pension credits per child recognized for mothers (Chile and Bolivia). It is too early to tell how these woman-friendly design features are going to affect the number of women eligible for a pension and the size of their benefits.

#### Social assistance: Non-contributory pensions

In view of the limited reach of social insurance programmes in countries where the labour market is highly dualist or where employment is extensively informal, increasing emphasis has been placed on the role of social assistance programmes. This includes social pensions (universal or means-tested).

Non-contributory pensions have been in place in a handful of developing countries/regions, accessed as a universal right (such as Botswana, Mauritius, Namibia, Bolivia and rural Brazil) or means-tested (e.g. South Africa, Costa Rica, Chile). The South African Old Age Pension (OAP), for example, is a non-contributory scheme financed from general revenue (rather than individual contributions). Women at age 60 and men at age 65 (currently being lowered to 60 years) become eligible to receive a monthly pension from the state, provided that they qualify in terms of an income-based means test. Evaluations of the South African OAP suggest that it is well targeted in racial terms; it also reaches women very effectively because they live longer, draw the pension earlier and are poorer (three times as many women as men receive a pension); it contributes to the security of the households in which elderly people live and is valued for its reliability (Lund 2006).

Unpaid workers (like workers with incomes that fluctuate and are below the cut-off rate) effectively have a guarantee of partial economic security in their elderly years, affording them an earned place in the household. The OAP is now recognized for making a distinctive contribution to poverty alleviation—both for pensioners themselves, and for people in the households in which they live.

Historically women have not been well-covered in pension programmes, whether public or private.

- The gendered nature of both paid and unpaid work (women's over-representation in informal and unpaid work), along with some problematic design features of contributory pension programmes, have tended to exclude women as direct recipients.
- The reform of pension programmes in the 1990s (1980s in Chile)—with bias toward individualized accounts which also took into consideration women's higher life expectancy—linked benefit levels more closely to individual work histories and contributions, and penalized women for their shorter labour market history, lower earnings and higher life expectancy.
- More recent (post-2000) pension reforms have addressed some of sources of bias against low-income, informal workers and women by, for example:
  - developing basic pensions detached from contributory history for the lowest income groups;
  - establishing or expanding non-contributory universal pensions;
  - creating a solidarity pillar to enhance pensions of workers with some contributions but low pensions;
  - including child credits that recognize women's unpaid care work;
  - adopting gender-neutral mortality tables for the calculation of benefits in individual accounts; and
  - eliminating fixed fees on individual accounts.

### ***Child/family cash transfer programmes***

As the social protection component with the strongest direct impact on poverty reduction, social assistance—in the form of targeted cash transfer schemes financed out of general budget revenues and aid—has become a focus of major innovation in recent years (UNRISD 2010). While family- or child-oriented cash transfers do not address workers' low earnings directly, they can nevertheless provide an additional source of regular income (usually relatively small) to families that qualify. There is considerable evidence from a number of countries that cash transfers targeted to children can reduce inequality and the depth or severity of poverty (Dfid 2011). There is also robust evidence to show the positive impacts of these transfers on children's access to health and education services, captured in school enrolment and attendance rates, and access to health centres.<sup>51</sup> In Brazil, where contributory programmes cover less than half of the economically active population, cash transfers, often targeted to the poor, have become central within the social protection system since the late 1990s (for example, *Bolsa Familia*). The Mexican cash transfer programme, *Oportunidades* (*Progresa* before 1997), has also attracted considerable attention in recent years. Likewise, South Africa has rapidly expanded the reach of its non-contributory social assistance benefits, including the Child Support Grant (CSG) in the post-apartheid period. While all three are targeted programmes that identify beneficiaries based on a means test, their actual reach is more extensive than the narrow targeting associated with "safety net" type projects of the early 1990s.

Although data are scant on the impacts of these programmes on poverty disaggregated by gender, a reasonable assumption is that transfers have a positive effect on the resources poor women have at their disposal. A regular and reliable source of income should be viewed positively, particularly in contexts where large numbers of women care for children and other dependents without support from male partners, and may even facilitate women's job search and access to paid employment (Veras Soares et al. 2007). There is also some evidence to support the argument that the programme can enhance women's self-esteem and financial security as well as giving them more opportunities to leave the house, access new public spaces and communicate with other women (Escobar Latapi and González de la Rocha 2009).

There are nevertheless a number of limitations that mark some of these programmes.

First, while school enrolment rates have improved, the quality of public services remains poor in many places. Hence, while cash payments may enhance poor people's access to public services, they do little to strengthen the quality of those services.<sup>52</sup> Some have even argued that resources allocated to CCT programmes may mean *less* public investment in public services (Melo 2008; Ghosh 2011).

<sup>51</sup> Melo 2008; Escobar Latapi and Gonzalez de la Rocha 2009; Budlender and Woolard 2006.

<sup>52</sup> This argument is also endorsed in the recent evaluation report on cash transfers produced by Dfid (2011).

Second, with respect to targeting, there are widespread concerns about the administrative costs, errors and stigma that can be introduced when programmes use a means-test to identify their beneficiaries (UNRISD 2010). The International Food Policy Research Institute's (IFPRI) qualitative research on *Oportunidades*, for example, found extensive discontent among communities in relation to the beneficiary selection process (Adato 2000). The beneficiaries, the non-beneficiaries, the doctors and the *promotoras* (voluntary workers) described non-beneficiaries' resentment over their exclusion from the programme as well as their lack of understanding of the basis for the differentiation (questioning its accuracy and fairness), leading to social tensions, occasional direct conflict and social divisions that affected participation in community activities (Adato 2000:vii). Means-testing has also been shown to be problematic, especially though not exclusively, in gender terms because it can enhance the discretionary power of authorities vis-à-vis women claimants. Local officials sometimes add new "tests" of eligibility, such as proving that taxes have been paid and requiring letters to be certified by police officers. Social assistance claimants may be perceived as "dependents" of government handouts, thereby justifying the discretionary handling of these benefits (see Goldblatt 2005 for South Africa; Lee-Gong 2010 for South Korea).

A final set of concerns, particularly relevant to this paper's concern with women's access to paid work, relate to the conditionalities attached to cash transfers. There has been concern that the requirement in some programmes that mothers perform community work, such as cleaning schools, in addition to the commitments they have to make to taking their children for health checks and attending workshops, may be adding to their already heavy workloads and taking away time from income-earning activities (Molyneux 2007; Chant 2008). More importantly, there is little, if any, research that proves that it is the conditionalities per se that cause the positive outcomes (such as children's improved school attendance) rather than simply the injection of additional cash into the household.<sup>53</sup> If the positive impacts are not the result of the conditions, then there are fewer reasons for the state to face the challenges and administrative costs associated with implementing conditions and for beneficiaries (usually the mother) to have to face the difficulties that conditions create for them (Budlender 2008b, Lund 2011). The South Africa means-tested social assistance benefits such as the CSG, for example, have been highly redistributive, contributing to a reduction in poverty (of about 2 per cent in 2005) and to improvements in children's school enrolment and nutrition (Budlender and Woolard 2006), yet without any behavioural conditionalities. Removing such conditionalities is an important short-term objective. In the medium to longer-term, increasing the size of such benefits (which tend to be smaller than other types of benefits<sup>54</sup>), extending the age bracket, and removing the income test can be additional steps toward creating a more universal child/family allowance system that can assist families, especially women, with some of the material costs of raising children. Providing child/family benefits on a universal basis also means that women in non-poor households can have an independent source of income of their own which may improve power inequalities in the family in their favour.

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<sup>53</sup> While *Bolsa Familia* and *Oportunidades* are both conditional programmes that in return for cash payments require certain behavioural changes (for example, that children attend school), the South African CSG has so far been an unconditional grant.

<sup>54</sup> Child and family allowances tend to be small in size, compared to other benefits; for example, the South African CSG is Rand 230 per month per child, while the OAP is R1100 per month per pensioner.

In the context of global concerns about poverty, policy enthusiasm for targeted social assistance programmes, especially child/family cash transfer schemes, has increased in recent years.

- Unlike the narrowly targeted “safety net” projects of the early 1990s, some of these non-contributory cash transfer schemes have wide coverage and are better institutionalized within the social protection system.
- If cash transfer programmes are well-designed and implemented, they can provide recipients, including many women, with a regular and reliable source of income, even though they tend to be small.
- However, there are some shortcomings that require policy attention:
  - while cash transfers enhance poor people’s access to public services, the quality of those services needs improvement through adequate state funding and regulation;
  - conditionalities that require unpaid work from time-pressed mothers can be harmful (constraining these access to paid work), while other conditionalities can deter people from making their claim; reducing or removing conditionalities can be helpful; and
  - family/child benefits tend to be relatively small; increasing the size of such benefits could enhance their effectiveness in reducing poverty.
- Universal child/family benefits can provide women in non-poor households with a small, though independent, source of income which may improve power inequalities within the family.

### Public works programmes

This sub-section examines a type of social assistance programme that is meant to respond to situations where households are not able to find paid work and/or not able to meet their basic needs with the earnings derived from such work. The beneficiaries of these programmes are likely to include a significant proportion of households whose adult members are either out of the labour force, unemployed or working informally with insufficient earnings. Rather than providing them with unemployment benefits or a cash transfer, what the state offers instead is employment—typically very difficult and physically demanding wage work. There are therefore fundamental questions about whether it is accurate to classify such schemes as “social protection” or “social assistance”. In fact, there are serious problems in targeting such work to low-income and nutritionally challenged individuals, and eroding their capabilities even more.

Over the years, many countries have undertaken what has variably been known as **employment guarantee schemes** or **public work programmes** to provide social assistance to those in need. Such programmes are often premised on the principle of the state acting as “employer of last resort”. In practice, these programmes have in most cases been implemented as a temporary measure, to provide the means of survival to those most affected by natural disasters (such as the Maharashtra Employment Guarantee Scheme which owes its origins to the drought of the early 1970s in the Indian state of Maharashtra), or economic crises (for example, the Argentine *Jefas Plan* which responded to mass unemployment in the context of the 2001 economic crisis). However, the case has also been made for using such measures on a permanent basis to guard against the many undesirable effects of underemployment and to promote the right to a job as a guaranteed entitlement (Antonopoulos 2007).

This is the approach taken by the government of India with the passing of the National Rural Employment Guarantee Act (NREGA) in 2005, which mandates the establishment of the National Rural Employment Guarantee Programme (NREGP). NREGA, in principle, guarantees 100 days employment in a financial year to registered rural households on demand, along with minimum wages, gender parity of wages, as well as the provision of basic worksite facilities (Kelkar 2009). Women comprise a significant share of the NREGP total employment at the all-India level: having started from around 40 per cent in 2006/7 period, they increased their share to 49.5 per cent by 2010 (NREGA 2011).<sup>55</sup>

Perhaps the most disabling feature of the scheme from a gender perspective is the guarantee of 100 days of work *per rural household*. This dilutes adult entitlements regardless of gender; but given the rural power inequalities, it risks putting women at the end of the queue, although reservation of one-third of all works for women may help reverse such gender bias. Still, single

<sup>55</sup> As expected, there is significant variation across the country, the actual proportion of women varying from a low of 4 per cent in Jammu and Kashmir to a high of 85 per cent in Kerala (Dasgupta and Sudarshan 2011).

women (widows, divorced, never married or separated) seem to face difficulties in accessing NREGP worksites (Kelkar 2009; Dasgupta and Sudarshan 2011). On the more positive side though, wages paid to women through NREGA, which at least in theory should conform to the state minimum wage, tend to be higher than wages women receive as unskilled agricultural workers (Dasgupta and Sudarshan 2011). Dasgupta and Sudarshan (2011) further show that there is a negative correlation between the gender gap in actual agricultural wages and women's participation in NREGP. In other words, the availability of work through NREGP seems to have pushed up the wages of women agricultural workers in the vicinity. They further suggest that NREGP can be a useful tool for minimizing the gap between women's actual wage and the minimum wage. However, benefits are diluted by linking wages to unrealistically high work requirements, which in the case of works requiring hard manual labour puts women in a particularly disadvantageous position (not to mention the risks that such manual labour has for the labouring poor of both genders who are already nutritionally vulnerable). Moreover, as numerous evaluations have shown, worksite facilities are often inadequate, especially in the provision of childcare<sup>56</sup> – a most disabling factor from women workers' point of view.

Hence what is on offer seems to fall short of a full-fledged "right to work". At least six basic features of a meaningful "right to work" programme from a gender perspective would thus be:

- full coverage of all urban and rural areas;
- individual entitlements (rather than household ones);
- unlimited days for which work is guaranteed;
- an assured decent living wage;
- the inclusion of non-manual work; and
- the provision of crèches.

NREGP, like many other public employment guarantee programmes, invests heavily in infrastructure projects, such as construction and maintenance of roads, which involves heavy manual labour and could be a deterrent to women's participation (Dasgupta and Sudarshan 2011). The *Jefas* programme, however, took a different approach, catering to community needs by providing a wide range of goods and services. Similarly, the South African Expanded Public Works Programme (EPWP) has also allocated a component of its projects to social services in the form of the Early Childhood Development (ECD) programme, and the Home/Community-Based Care (HCBC) programme. Both the South African and the Argentine programmes, however, are meant to be of limited duration, and hence strictly speaking, not comparable to the NREGP.

The origins of *Plan Jefas* can be traced to the economic crisis of 2001 with its highly adverse employment consequences. The programme targeted the unemployed heads of households (regardless of gender) who are responsible for a child under 18 years of age or caring for a disabled child or a pregnant spouse. As in the Indian NREGA, participation was limited to one person per household. Payment from the programme was made conditional on the performance of 20 hours of paid work (rather than ensuring children's schooling and nutrition, as in several cash transfer programmes). Ironically though, the work conditionality seems to have been an afterthought to the original design, given the large number of applicants and the budgetary constraints imposed on the programme.

Beneficiaries are offered a monthly stipend of 150 pesos in return for 20 hours of paid work per week. Yet contrary to expectations, close to 71 per cent of programme beneficiaries have been women, from households marked by high dependency ratios, low levels of income and education, and poor housing conditions – perhaps a reflection of the low wage. No formal provision was made for care of young children (those under 5). Interestingly though, while the

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<sup>56</sup> Narayan 2008; Gupta 2009; Kelkar 2009.



programme intended to target unemployed heads of households, a significant proportion of both female and male beneficiaries reported being economically inactive before joining the programme. The only factor precluding participation in the *Plan Jefas* is social security contributions attached to formal employment—a conditionality that may inadvertently promote informal and precarious forms of work. Tabbush (2009) underlines the tension between the national campaign to register and formalize domestic workers and the willingness of some such workers to remain informally employed in order to continue receiving the *Plan Jefas* stipends.

Evaluations suggest that while the programme’s impact on levels of poverty has been ambiguous, it has been successful in reducing indigence (extreme poverty), and unemployment (a person registering under the programme is automatically counted as “employed”). Furthermore, *Plan Jefas* seems to have been effective in reducing social tensions produced by the crisis, not only by providing a safety valve through the provision of work/cash but also by facilitating alliances between different social actors, including the unemployment movement, state officials, NGOs and faith-based organizations.

Turning to the gender implications of the programme, despite women’s numerical preponderance in the programme (see table 7), prior to 2006 men had higher graduation rates from the programme into formal work than women (Tabbush 2009). This is not surprising given men’s prior labour market skills and experiences, and the fact that post-crisis growth patterns in Argentina have created more work opportunities for men than women, especially given the dynamism of the construction sector. Yet the picture is more complicated than this single finding would suggest. Since 2006, male and female rates of graduation seem to have converged, and the paid work women find seems to be more stable (Tabbush 2009). Significantly, even though women participants have been incorporated into the labour market at a much lower rate than their male counterparts (initially at least), many of those who are entering the work force had no recent experience of formal sector work and seem to be therefore slowly cultivating links with the formal labour market (Tabbush 2009). Evidence from qualitative research suggests that the acquisition of new skills and the greater probability of finding formal employment is something that female participants in the programme strongly value (Tcherneva and Wray 2007).

**Table 7: Selected Employment Guarantee Schemes**

Country	Programme	Year established	Percentage participation of women (country average)
Argentina	<i>Jefes y Jefas de Hogar Desempleados</i>	2001	71
Ethiopia	Productive Safety Net Programme (PSNP)	2005 (pilot)	32
India	National Rural Employment Guarantee Act (NREGA)	2005	49.5
South Africa	Expanded Public Works Programme (EPWP)	2004	79
South Korea	National Basic Livelihood Security System (NBLSS)	1997	70

**Sources:** Tabbush 2009; Quisumbing and Yohannes 2004; Kelkar 2009; Gupta 2009; Dasgupta and Sudarshan 2011; NREGA 2011; Antonopoulos 2009; EPWP 2010; Lee-Gong 2010.

As already noted, the South African EPWP is often favourably regarded for including social service delivery as part of its definition of public works (Antonopoulos 2007). This is a particularly pertinent innovation in the South African context given the very high rates of structural unemployment, on the one hand, and the dire need for care services to cater to the large number of AIDS patients, on the other. It could thus potentially meet a number of objectives simultaneously.

As expected, many of the jobs in the social sectors have indeed been allocated to women. However, there are some questions about how female labour in these sectors is being valued. Statistics about the scope, coverage and impact of the public works devoted to social services are unreliable, and implementation has been much slower than planned (Budlender and Lund 2010). Moreover, in some EPWP projects only training is given, with no work being available after the training. Most disappointing is the programme's performance in terms of wages: the wages paid in the social programmes where women predominate have been much lower than those paid in the more traditional public works programmes where men typically work (Budlender and Lund 2010). Addressing such disparities and inequalities in wages offered to women and men is another important priority.

Another form of social assistance that is targeted to the poor is public works programmes, providing employment to those in need.

- Usually these programmes are provided as a temporary measure to cope with the social fallout of natural disasters or deep economic crises (e.g. *Plan Jefas* in Argentina).
- In some cases programme provision can be on a permanent basis to guard against adverse employment conditions and to promote the right to paid work as a guaranteed entitlement (e.g. NREGA in India).
- Women very often represent a significant share of participants in these programmes.
- Improving some features of these programmes can facilitate their general effectiveness in tackling poverty and unemployment/underemployment:
  - full coverage of all urban and rural areas;
  - unlimited days for which work is guaranteed;
  - an assured decent living wage;
  - changing the work requirements to reduce arduous labour; and
  - provision of social infrastructure (e.g. drinking water).
- Additional features are necessary in order to place women's participation on a more equal footing:
  - Individual, rather than household, entitlements;
  - the inclusion of non-manual work projects that can be reasonably performed by women;
  - provision of child care facilities.

### ***Enabling social protection: Paid leave and care services***

How can women's employment prospects be improved in contexts where much of the unpaid domestic work and caring for dependents is socially assigned to them? Historically the provision of paid maternity (now parental) leave, and more recently care services for young children, has facilitated women's capacity to keep a foothold in the labour market. But how can such provision reach those who are informally employed?

The right to paid maternity and parental leave is highly constrained in contexts where significant numbers are in informal employment. In Argentina, for example, the law that stipulates a three-month maternity leave at 100 per cent wage replacement applies only to half the female workforce due to pervasive informality (Faur 2008). In countries where a larger share of the workforce works informally, as in India or Tanzania, paid leave is only an option for the few (at most 10 per cent) who are formally employed.

A similar spill-over from labour market inequalities to care entitlements can be observed when childcare service provision is through the system of social security, excluding again, informal workers or those who are outside the labour force from this service. Where access to childcare services has been introduced as a right of working mothers, and provision is left to employers, as in Argentina or Chile, weak enforcement often leads to low compliance and coverage. Given the declining efficacy of stratified social security systems in Latin America, there has been little effort to implement or expand the scope of earlier legislation that had made childcare a right for formally employed mothers (Mahon 2011). Instead, states in the region have taken significant steps to expand both formal and non-formal or community-based forms of care and preschool education.

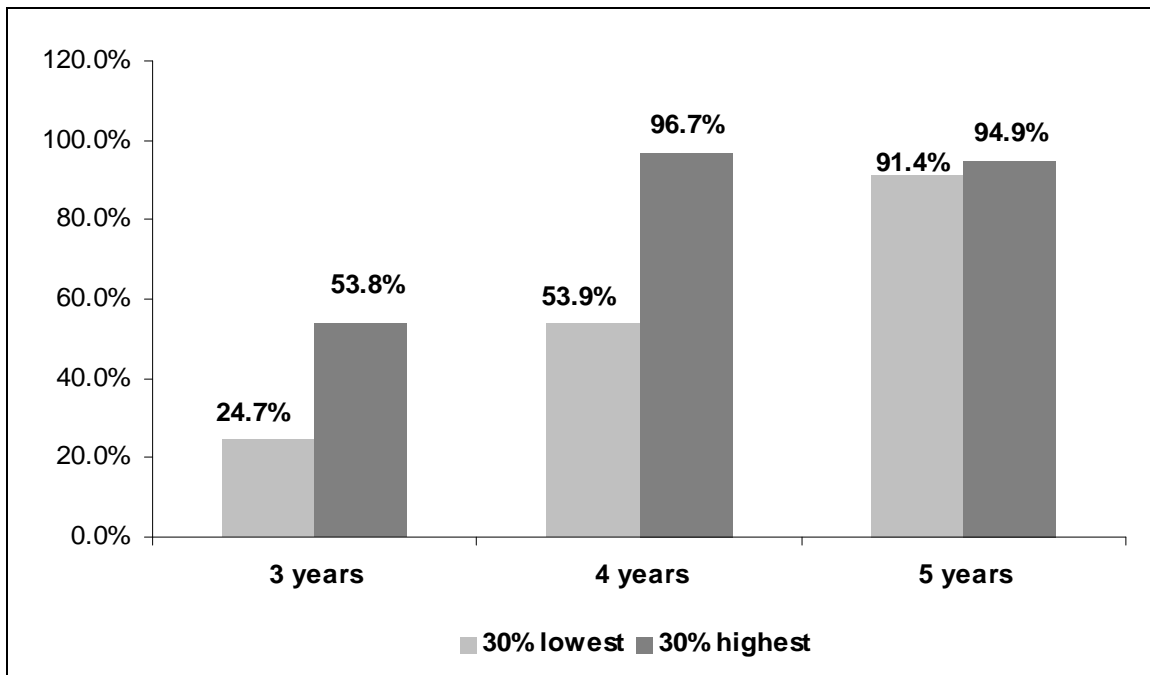
Universally accessible and quality care services can play a pivotal role in expanding women’s life options, especially their ability to engage in paid work. The demand for accessible care services has been high on women’s movements agendas in many industrialized countries, and it is being increasingly articulated by women’s rights advocates in other countries as well. Feminist demand-making is sometimes supported by child rights advocates.

Programme segmentation and inequality

Middle-income developing countries such as Argentina, Chile, Mexico, South Africa and Uruguay have been experimenting with a range of care-related policies, including early childhood education and care services. All of these countries are also characterized by high levels of income inequality. The challenge they face therefore is not only to expand service coverage, but to do so in a way that reduces class and regional inequalities in the quality of services accessed by children from different socioeconomic groups. This becomes a formidable challenge when a mix of public and private provision is used, and where different kinds of “public” services are targeted to children from different socioeconomic backgrounds.

To give some concrete examples, class and regional differences in access to preschool education for five-year-olds have been substantially reduced in Argentina by making enrolment mandatory for this age group and by expanding public preschools (Faur 2008) (see figure 9). However, for the younger age groups where public provision is limited and the market plays a dominant role, enrolment rates for children from lower income households remain only a fraction of higher income groups (see figure 9). Since low-income families cannot afford private childcare, they face long waiting lists for public crèches, often rely on less professionalized community services or on unpaid care by family members (Faur 2008). Similarly, for large numbers of women in low-income households in India who are pushed into the labour force by poverty, care options are very limited. This is especially the case if they are recent migrants into cities and unable to rely on assistance from relatives; the only options they have is to leave their children in unregulated “crèches” in people’s homes and backyards, with siblings, or even on their own (Palriwala and Neetha 2010).

**Figure 9: Large cities in Argentina: Preschool attendance rates by age and per capita household income, 2006**



Source: Faur 2008.

### The care sector as employer

The expansion of care services can not only build up human capabilities (of those being cared for) but also generate new employment opportunities, especially for women, both by facilitating employment among those with heavy unpaid care responsibilities, and by creating jobs in the care sector. Paid care services such as childcare, elder care, nursing and teaching constitute a growing part of the economy and of employment in many countries (Folbre and Nelson 2000; Palriwala and Neetha 2010). Shifting care out of the family (or de-famililization) is now advocated by a wide range of policy institutions (including the European Union) for advanced industrialized countries as a strategy for expanding employment opportunities for women—an important pillar, so the argument goes, of the Nordic and Swedish scenario.

In a simulation case study of South Africa, Antonopoulos and Kim (2011) demonstrated that an injection, equivalent to 1 per cent of GDP in 2000, on the social sector (ECD projects and HCBC) generates 571,505 direct jobs in the sector, while linkages to other sectors and households generate 192,893 jobs. Overall, for every three jobs created due to the social care expansion, an additional job opens up within the economy. Shifting parts of unpaid care work to paid work by expanding the domain of social services brings about economy-wide employment outcomes that both promotes gender equality and are powerfully pro-poor. This is a persuasive argument. However, realities on the ground tell a more complicated story.

The first obvious point to make is that de-familialization of care has not changed the fact that it is still predominantly women who do this kind of work (even in Sweden). Second, a wide range of research on both developed and developing countries shows that care work often carries a “penalty” in terms of wages and salaries regardless of the level of skill and education content of the work (England et al. 2002; Budig and Misra 2010).<sup>57</sup> One form of paid care provision that has grown in recent years, in developing countries with high levels of income inequality such as China and India, as well as in several developed countries, is paid domestic/care service. Many of these workers have little or no access to social protection programmes (e.g. health insurance), and sometimes have to leave the care needs of their own dependents unattended in order to earn their living (Palriwala and Neetha 2010).

Third, the recent expansion of care related social programmes—be it in the area of early childhood education and care or the home-based care programmes that have mushroomed in sub-Saharan Africa in response to the care demands associated with HIV/AIDS (Lund 2010; Meena 2010)—have come to rely heavily on “voluntary” or community work. This is very often a short-hand for unpaid or underpaid work predominantly performed by women.

In India, for example, the Anganwadi workers and helpers who staff the Integrated Child Development Scheme—probably the largest early childhood nutrition scheme globally—also fall into a highly ambivalent category. While employed by the state, they are not classified as workers, but as “volunteers” who receive stipends instead of wages and lack the leave entitlements and social security benefits available to permanent, full-time public employees (Palriwala and Neetha 2010). In other cases, as was already mentioned in section 3 of this paper, carers may be working for the not-for-profit organizations that are contracted by the state, but not usually properly compensated, to provide the service. Indeed, in many developing countries, many social programmes attending to care needs would not function without the participation of community-based and non-profit organizations. In this way the costs of providing the service are effectively absorbed by frontline care workers who perform the work for less pay than in the public sector, through self-exploitation.

This is a very different scenario from the Swedish one where care service expansion was financed and regulated by the state, and where care workers were public employees, with all

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<sup>57</sup> Interestingly while the Swedish labour market is highly gender segmented, Budig and Misra's (2010) analysis of the care penalty for a wide range of countries included in the Luxembourg Income Survey dataset shows that in Sweden carers are not subjected to a care penalty (in fact the public sector, which is the main employer of Swedish care workers, pays a “bonus” to care workers).

the rights and entitlements that it implied. If the expansion of the service sector, and care services in particular, is going to play the role of a growth engine that is capability enhancing, then respect for workers' rights, the struggle for equal pay and the assurance of quality outcomes in the care sector all constitute important challenges that public policy needs to confront. Folbre (2006) suggests a link between these challenges, arguing that workers and consumers of paid care services "share a common interest in maintaining quality of care and should try to develop stronger coalitions to prevent market forces from lowering it" (p. 2).

The challenge facing policy makers is to help shift from a strategy that relies on market and voluntary provision of care of the most informal and exploitative kind, to one that nurtures professional, decently paid and compassionate forms of care. Both workers and care recipients will benefit from such a shift. This requires effective regulation and monitoring by states. Organizations of care workers and of care-users also need to be involved in order to build public confidence in such services and sustain their financing through general taxation. Non-profit organizations and civil society associations play an increasingly important role in the delivery of care services. It is the duty of the state to create clear standards on the rights of volunteers (health and safety at work, regular stipends), and to recognize them as workers given their growing numbers in the care workforce (Razavi and Staab 2010).

Access to paid leave and quality care services can enhance women's employment prospects. The provision and financing of such measures can be through employers and the private sector, employees themselves, and/or the public sector.

- The right to paid leave and care services is highly constrained in contexts where significant numbers are in informal employment and where provision is the responsibility of formal sector employers.
- In recent years governments have taken significant steps to expand both formal and non-formal or community-based forms of care and preschool education; in several middle-income countries access to pre-school has expanded for both rich and poorer households.
- However, provision of care services for younger age groups remains limited and unequal across income groups and regions.
- One set of concerns about provision of care services is the segmented nature of such programmes, where different quality services are used by children from different social/income groups, thereby reinforcing inequalities.
- The second area of concern is about the employment conditions characterizing care work, a largely female domain (e.g. low wages, lack of social protection).
- While care services can become an important source of employment for women while enhancing the capabilities of care recipients, the challenge facing policy is to shift from a strategy that relies on market and voluntary provision of the most informal and exploitative kind, to one that nurtures professional, decently paid and compassionate forms of care; both workers and care recipients are likely to benefit from such a shift.

### ***Social protection programmes and economic security: A wrap-up***

The analysis in this section has time and again highlighted the specificity of women's position – with respect to employment and social protection – given the fact that they stand at the crossroads of the paid and the unpaid care economy, over-represented within the informal economy and disproportionately implicated in the unpaid work that goes into reproducing labour, families and households. This has two key implications.

First, policy needs to take account of women's employment trajectories *as they are* – rather than as they *ought to be* according to some androcentric vision. This will bring to the fore gender-based inequalities in types of employment, earnings and life-long contributions. As previous sections have shown, some of these gender differences can be attributed to women's social obligations to care for others, but others may be due to the social norms that create hierarchies within labour markets (for example, gendered definitions of skill and the perception of women as secondary earners). **Second**, given these gender-based labour market inequalities, three different (but potentially complementary) strategies are needed for equalizing social protection outcomes for women and men:

**Strategy 1:** eliminating discriminatory practices in social insurance programme design so as to obtain more equal outcomes. A good example of this is credit given in pension systems to

compensate for the time that the main carer (be it a woman or a man) allocates to unpaid care work. Another example is for the state to make affiliation to health insurance mandatory and to extend the coverage to all salaried workers as well as to those who work informally and sporadically.

However, even if some such design features are introduced, they are unlikely to produce equal outcomes in terms of social protection on their own. Many women and men who work informally and sporadically are likely to remain in a disadvantaged position in terms of social protection as long as social protection benefits are tied, even if loosely, to employment and earnings, and as long as pervasive gender inequalities persist within labour markets. Hence, two additional and complementary strategies are needed.

**Strategy 2:** strengthening labour market regulations and social provisions to create a more level-playing field for women within labour markets. This includes labour market regulations, for example on minimum wage or elimination of discriminatory wages, as suggested in previous sections of this paper. It also includes putting in place pro-active social provisions such as public care services that can enhance women's labour market performance, as well as employment guarantees that increase demand for labour during economic downturns.

**Strategy 3:** developing systems of social protection that are not linked to employment, through social assistance programmes for example. These provisions range from those that are more generous and rights-based (universal child benefits and social pensions) to those that are targeted and "needs-based" (means-tested child benefits or social pensions), and finally to those that are both means-tested and conditional (conditional targeted child benefits). There are advantages to programmes that are broad-based and universal: the greater possibility for redistribution and cross-subsidies, the avoidance of exclusion and stigma; the reduction of administrative costs (on public administration) and reduction of additional work burdens on potential beneficiaries.

It is important to underline that these three measures are complementary and not substitutes. It is also important to underline that excessive demands should not be placed on social protection systems. In the end, social protection systems cannot substitute for adequate macroeconomic, industrial or agricultural policies, nor can they create sufficient quantity and quality of employment and a fair distribution of income on their own. As such, they need to work in tandem with a number of other policies to create more equal and prosperous societies (Razavi 2011).

## **6. Practices to Strengthen Labour Market Outcomes for Women: Spaces for Agency and Activism**

Policies and practices are not made in a political vacuum. Many observers have argued that one of the reasons why the risks and benefits of globalization have been so unequally divided between labour and capital in both developed and developing countries is that labour organizations and trade unions have lost the bargaining power they once had.<sup>58</sup> Yet the emergence of global production chains has also created new spaces and forms of activism, strategic alliances and coalitions involving unions, NGOs and campaigning networks in support of labour rights.

The period of import-substitution industrialization in largely closed economies is widely regarded as one that gave trade unions certain political privileges. Trade unions were not

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<sup>58</sup> Elson (2004), for example, argues that possibilities of shaping macroeconomic policy through an open social dialogue in which different social groups can exercise "voice", and in which social objectives can be explicitly brought into view, is foreclosed not by the technical requirements of macroeconomic policy making but by fear of pre-emptive exercise of the "exit" option by financial institutions.

participants in economic policy making everywhere. In the East Asian high growth economies in particular, labour had very little say in economic policy making during the 1970s and 1980s. But in a significant number of countries in Latin America and a smaller number in Africa, labour unions, in conjunction with political parties (either Leftist or populist), were able to leverage their political strength for both particularistic gains for their members, as well as broader concessions, such as subsidies on food and other basic consumption items that benefited middle and lower-income groups (Collier and Collier 1991, cited in Collier and Handlin 2005).

However, since the 1980s the political significance of the “union-party hub” has declined as unionization rates have fallen and the links between unions and labour-based parties have weakened (Collier and Handlin 2005). Shrinking membership and changing power structures have inevitably led to an erosion of political power and access to decision-making circles (Bonner and Spooner 2010).

At the same time, as the third wave of democratization swept through parts of sub-Saharan Africa and Latin America, civil society associations which had been hitherto peripheral, proliferated. Popular organizing around subsistence needs was given a particular boost in the context of recurrent economic crises as a way of coping in the face of hardship. These myriad forms of associations have become more central “as structures through which the popular sector articulates interests and solves collective problems” (Collier and Handlin 2005:4). It is within this context—both of traditional trade union decline as well as the proliferation of new forms of organizing—that the interests of informal workers are being articulated.

For some unions as membership levels precipitously declined, opening their doors to informal workers became a survival strategy. For example, in the 1990s the membership of the Uganda Public Employees Union (UPEU) dropped significantly as a result of privatization of government services. The union realized that its only chance of survival was to change radically its outlook and scope—in this case, broadening its membership categories to include workers in the informal service sector (such as street vendors). As a result of these changes and a new organizing drive, the membership of the union started to grow again (Horn 2002). The new unionism, or “social movement unionism”, can also be seen in countries where formal sector unions have not faced such precipitous decline in their membership, such as Argentina and Brazil. In these two countries attempts are made to build bridges to, and make common cause with, informal worker associations. In Argentina, for example, one of the two national confederations, the relatively new Congress of Argentine Workers (CTA), was born as a left-wing splinter of the traditional trade union confederation (CGT) toward the late 1990s and expanded to include informally employed workers through alliances with neighbourhood organizations (Etchemendy and Collier 2007).

In other cases, informal workers themselves have formed new unions that cater directly to the needs of informal workers. Some were created “spontaneously” by informal workers, while others were conceived and supported by external actors (women’s organizations, NGOs, and so on). Perhaps the most notable of this type of union is SEWA, which was founded in 1972 as a trade union, a women’s movement and a co-operative movement. SEWA grew out of the Women’s Wing of the Textile Labour Association (TLA), India’s oldest and largest union of textile workers, and caters exclusively to women workers (Gallin and Horn 2005). In 2011, SEWA had 1,257,000 members throughout India, representing the single largest informal sector union in the world.

Other labour associations were formed as branches of pre-existing unions on the initiative or with the encouragement of national trade union centres. In some of these cases, informal economy associations which were not formally constituted or could not register as trade unions (due to labour laws that exclude workers from trade union structures unless they are able to demonstrate a clear employment relationship, that is, an identifiable employer) were encouraged to join national trade union centres as “associate” members. Under the umbrella of

pre-existing union protection and legitimacy, workers and workers' associations have been able to gain recognition and legitimacy within local and national politico-social frameworks. For example, the Korea Women's Trade Union (KWTU) grew out of the Korean Women Workers' Association United (KWWUA), a network of six regional women's organizations. KWTU unites women workers across company and industry borders to assist them in their struggle for equal opportunity, legal rights, and against discrimination. KWTU has 1,500 union members, 71.8 per cent of whom are non-standard women workers (including administrative workers, scriptwriters, nutritionists, school cooks, janitors, room maids, golf caddies and domestic workers).<sup>59</sup>

There are also many NGOs that have been established to support informal workers, or have a remit which includes them. There are, for example, local and national NGOs that concentrate on community development, housing, the environment, livelihood development or human rights, where informal economy workers become the focus of attention. In areas where trade unions or other member-based organizations (MBOs) have little influence, profile or organizational strength, NGOs may attempt to fill the vacuum—either by advocating or campaigning on the workers' behalf, providing support and advice, and/or establishing some sort of association (Bonner and Spooner 2010).<sup>60</sup>

The efforts made by traditional trade unions to represent a larger segment of the workforce beyond their traditional base, and the proliferation of other forms of organizing by informal workers themselves and/or in alliance with unions and NGOs, both nationally and transnationally, can be viewed positively. Yet attention also needs to be drawn to the difficulties involved in forging collective action in such contexts. The constraints include the diversity of interests among informal workers (wage workers and own-account workers), their geographical isolation and dispersion, the absence of the traditional employer-employee relation (for example, in the case of own-account workers, workers in sub-contracting arrangements), and the difficulty of sustaining membership dues when incomes are low and volatile. Scant resources and inability to make stable budget forecasts can hinder scaling and cooperation (Collier and Handlin 2005), although donor funding may be able to fill some of the gap.

In addition to the above constraints to formation and scaling of collective action, there are also questions about how effectively informal worker organizations are able to represent the interests of their constituencies, applying pressure to political elites, and participating in the shaping of policies that affect employment, wages and the working conditions of their members and constituents.<sup>61</sup> On this front it could well be argued that while informal workers organizations have had some success in making their constituents more visible in policy debates and in the way labour force statistics are organized, and while some success has been registered at the level of municipalities—for example in changing urban regulation to facilitate the work of street vendors or market women, or in getting waste collection contracts at the municipal level, or in extending social insurance programmes to cover domestic workers (see box 3)—they have not been well-placed to influence macroeconomic policy at the national level.<sup>62</sup> This is not, however, necessarily a reflection of associational weakness or failure. The ability to achieve influence at the national level is also dependent on the economic model and orientation of state policy making. Some would argue that in the context of globalization the policy parameters

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<sup>59</sup> Horn 2002; Gallin 1999, 2004; Choi 2000.

<sup>60</sup> NGOs are however frequently viewed with distrust by unions and informal workers themselves for several reasons, aside from questions of class and background: there are questions about the democratic accountability of NGOs, concerns about dependency and patronage given the greater resources that NGOs command, and so on.

<sup>61</sup> Collier and Handlin (2005) provide a useful analytical framework for assessing problems of collective action of "union-party hub" versus those of the "associational interest regime". Their paper compares these two ideal types.

<sup>62</sup> In the literature on Latin America there is concern about how piecemeal and discretionary response to the demands of popular associations can feed into clientelism (Collier and Handlin 2005). Judith Tendler (2004) talks about a "devil's deal" where local politicians collect votes by allowing myriad small firms to operate informally (by not collecting taxes from them, and protecting them from police and labour inspectors).



over which states can exert control (such as fiscal deficits and import controls) are reduced, or at least there is a change in policies that can be legitimately contested (Collier and Handlin 2005).

The experience of domestic workers, elaborated in box 3, shows that even in the era of labour market informalization it has been possible, in some countries at least, to give recognition and social protection to one of the most historically informalized groups of largely women workers. The political struggle for the recognition of informal or non-standard work could thus be seen as a first step in the process of claiming other rights, for example the right to a pension, the right to wage replacement in cases of injury, illness, maternity or unemployment, or the right to family or child-related allowances to assist families with some of the material costs of raising children.

### **Box 3: Domestic workers, labour rights and social protection**

While domestic service employment is a significant and, in some contexts, growing source of employment for women and girls in many developing countries, domestic workers often lack access to labour rights and social protection. In some countries, such as India, paid domestic work is not even recognized as such. The earnings of domestic workers in that country tend to be among the lowest of all occupations, and far from enough to keep their households out of poverty. Similarly, in Brazil and South Africa, 30 per cent and 65 per cent of domestic workers respectively, live in poor households (Heintz 2008).

In recent years, however, several countries have attempted to improve the employment conditions and status of domestic workers. In Bolivia, for example, years of lobbying by domestic workers' organizations culminated in the formulation of a household worker law in 2003, stipulating a minimum wage, maximum working hours, holidays and a bonus of one year's pay after five years of work. Argentina, Chile, Peru and South Africa have also recently strengthened the protection of domestic workers. How were rights of domestic workers placed on the policy agenda in these countries? Comparative research on legal reforms in Latin America suggests that besides autonomous organizing on the part of domestic workers themselves, political alliances with labour, feminist and indigenous organizations as well as progressive legislators were key (Blofield 2009).

Of course, enshrining the rights of domestic workers to decent pay and working conditions is only a first—albeit necessary—step to greater social protection. Legal rights also need to be enforced and complied with. So what has been achieved? Evidence from South Africa suggests that labour-market interventions can help improve wages and working conditions: the introduction of minimum wages is shown to have raised hourly earnings by more than 20 per cent within one year, without apparent negative effects on employment. Other legal requirements, such as the right to a written contract, paid leave, severance pay, dismissal notice and access to unemployment insurance, seem to have had similar positive effects: They raised the proportion of domestic workers with a written contract from 7 per cent in 2002 to 36 per cent in 2007 and the share reporting unemployment deductions from 3 per cent to 32 per cent (Hertz 2004; Lund and Budlender 2009).

Domestic workers rights are also being increasingly pursued at the global level. For example, in March 2008, the governing body of the ILO agreed to put the issue on the agenda of the 2010 International Labour Conference, with a view to adopting a Convention by mid-2011. The final discussion on an ILO Convention and Recommendation for Domestic Workers were successfully concluded on 16 June 2011. In addition to the fundamental rights set out in the ILO's core conventions (freedom of association, elimination of child labour and forced labour), some of the more important gains include: the right to a written contract; working time regulation; health and safety provisions; social security coverage, including maternity; and protection of migrant domestic workers. The Convention and Recommendation have obtained broad support and some governments (such as Philippines and Uruguay) have already declared that they will proceed to ratification.

These were some of the entitlements that the working class, predominantly male breadwinners, had historically struggled for (or were given in a top-down fashion) in the era of industrialization and welfare state construction. Variations of this model existed not only in Europe, but also in some Latin American countries that followed the so-called Bismarckian model with its contributory basis (Filgueira 2007). This was an era when national economies were relatively inward-looking. Has the context of globalization created any new spaces and modalities for activism and claims-making? We turn to this question in the next sub-section.

### ***Voluntary standards and codes of conduct***

Historically, labour standards<sup>63</sup> were largely a product of normative frameworks developed by governments, labour unions, or the two together. However, with the globalization of production processes on the one hand, and the ideational shifts associated with “free market” capitalism (including its fervent critique of “state failure”) on the other, these frameworks have come under increasing criticism while new forms of governance have gained ground (Bain 2010).

In this context a discourse and a set of policies, practices and institutions associated with corporate social responsibility (CSR) have moved to the fore, including “softer”, voluntary approaches to business regulation being promoted to improve aspects of company performance that relate to social and sustainable development and human rights (Utting 2005). The rather limited, top-down and soft agenda of private regulation, which typically involved a few companies and a limited range of environmental and social issues, has evolved considerably over the past two decades to encompass more companies and industries, a broader set of issues (including labour rights), an attempt to reach deeper into globalized supply chains (as opposed to remaining at the level of parent firms and affiliates), the involvement of trade unions and other civil society organizations alongside companies, and a “slight hardening of the soft voluntarism that characterized the early experience of CSR” (Utting 2005:3). Observers note the “scaling-up and ratcheting-up of standards and implementation procedures related to CSR”, with regulatory functions increasingly assumed by NGOs, “multistakeholder institutions” or “public-private partnerships” associated with standard-setting, company reporting, monitoring, certification and learning about good practices (Utting 2005:1).

Another important shift has been from micro company approaches to international soft laws which are supposed to guide company practices (Utting forthcoming). Two pertinent examples of this soft law are the approval, in 2008, by the Human Rights Council of the “Protect, Respect and Remedy” framework for business and human rights which centres on both legal and voluntary dimensions of regulation;<sup>64</sup> and the launch of the “Women’s Empowerment Principles” by the Global Compact and UNIFEM (now UNWomen) in 2010. A related development at the international level is the emergence of International Framework Agreements (IFAs) between Global Union Federations (such as the International Union of Food Workers/IUF) and transnational corporations (TNCs) to focus on labour rights along global value chains, in the food industry as well as other sectors like garments (Barrientos 2008; Hammer 2012).

Within these multistakeholder initiatives there is a diversity of types of worker organizing, including traditional unions, NGOs, as well as less formal women worker associations and support centres at the grassroots (Hale and Shaw 2001). There is also great diversity internationally in the kind of organizations supporting labour rights, again from the more traditional unions, to small NGOs such as Women Working Worldwide (WWW), to larger ones such as Oxfam, as well as campaigning networks such as Clean Clothes and Labour Behind the Label (Hale and Shaw 2001). Indeed, Hale and Shaw’s assessment is that “the development of strategic alliances and coalitions among different labour interest groups” may be the lasting legacy of the codes approach (2001:526).

While multistakeholder initiatives have addressed some of the deficits of voluntary approaches, by involving workers’ organizations and organizing workers on the ground, some noteworthy limitations nevertheless remain (Utting 2005; Zammit 2008):

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<sup>63</sup> ILO’s international labour standards embrace numerous aspects of labour markets, ranging from minimum wages and equal pay to health and safety regulations. These standards can be classified into six main categories: respect for fundamental human rights; protection of wages; employment security; working conditions; labour market and social policies; and industrial relations (ILO 1994).

<sup>64</sup> The “Guiding Principles for Business and Human Rights” for implementing the Framework were endorsed by the Human Rights Council three years later, in 2011.

- Multistakeholder initiatives (e.g. Ethical Trading Initiative/ETI) still involve only a fraction of the world's TNCs, affiliates and suppliers; large businesses, especially the well-known multinationals and brand-name companies with a reputation and intangible capital (brand value) to protect have more reason than others to undertake CSR activities.
- Bringing more issues into the agenda has inevitably also complicated the task of ensuring that such standards are applied; progress appears to be slow in particular on labour-related standards (ILO 2004 cited in Utting 2005); a McKinsey report (2007 cited in Zammit 2008) suggests that environmental issues head the political agenda of business, having dislodged the earlier concern regarding employment losses due to outsourcing.
- The procedures put in place by certain schemes to encourage compliance with standards are often weak and do not ensure sufficient implementation and monitoring.
- Although spaces have been created for the involvement of labour interests and while some multi-stakeholder approaches have governance structures that are genuinely participatory, "some schemes tend to be fairly exclusionary, top-down and technocratic" (Utting 2005:5).

On labour standards more specifically, highly publicized abuses of human rights in global value chains in the garments, footwear, toys and electronics industries have led some businesses to address labour conditions in their supply chains through company codes, participation in industry-wide codes and multistakeholder initiatives (such as ETI) (Zammit 2008; Barrientos and Smith 2006). Such codes are also now increasingly found in fruit and vegetable production destined for export (for example, GlobalGAP, previously known as EurepGAP) (Bain 2010). Global Union Federations, as has already been noted, have also taken the initiative to focus on labour rights within these global value chains through IFAs which have proliferated in recent years. Several assessments point to the positive impact of these initiatives in relation to certain code principles (for example, ETI's positive impact on health and safety, minimum wages and employment benefits), but largely for regular and permanent workers (Barrientos and Smith 2006). They have also drawn attention to a number of major impediments in applying labour standards to all workers, including the more "flexible" and casual segments of the workforce. As Hammer (2012) observes, "the use of IFAs is geared to a model of TNC that has since evolved considerably, that of a producer lead firm with a relatively well organized skilled workforce in the main operations". This model is very different from the "rapidly changing dynamics of global production, characterized by increased outsourcing of production by large global buyers and retailers to a network of suppliers across large numbers of countries" (Barrientos 2008:978) which employ a highly dispersed workforce composed of casual and contract workers.

- Despite efforts to extend the monitoring of labour conditions beyond the parent firms and affiliates, it is very difficult to do this in practice due to lack of information concerning the number, identity and location of suppliers (Zammit 2008).
- Assessments of both ETI and GlobalGap,<sup>65</sup> and of International Framework Agreements (Hammer 2012), have drawn attention to the failure of these initiatives to extend the implementation and monitoring of standards to the large numbers of women who work as temporary workers and contract workers – the Achilles heel of corporate codes (Barrientos 2008).

As the 2007 IDS assessment of ETI explained:

There was widespread use of workers employed casually and/or by third party contractors (labour providers) in all countries and sectors in our study. Anecdotal information suggests that the use of this form of labour is increasing and that some suppliers are using more casual or contract labour to cope with extreme fluctuations in orders. Codes are failing to divert this trend, with these workers largely falling outside the radar screen of both

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<sup>65</sup> See Barrientos and Smith (2007); Barrientos (2008); Bain (2010).

codes of labour practice and national legislation (Barrientos and Smith 2006:42).

A similar trend has been documented for the global food chains engaged in the export of fruits, vegetables and cut flowers. Even in an upper-middle income country like Chile with good state capacity to monitor labour conditions, research has shown that state regulation of labour conditions can be minimal, and private-sector regulatory approaches such as GlobalGAP which provide significant health and safety benefits to the small segment of the workforce that is hired on a full-time, permanent basis (largely male), fail to reach the army of largely female temporary workers (*temporeras*) who are the most precariously situated (Bain 2010). As a consequence, “GlobalGAP standards in fact act to maintain and reinforce the inequitable labour and gender relations that exist within Chile’s flexible and feminized fruit export sector” (Bain 2010:352).

The evolution of CSR agenda has shown that it is a highly differentiated and dynamic field, providing some new spaces for activism and coalition-building among labour interests, both nationally and transnationally. As Utting (2005) notes, this cautions against broad generalizations about its future trajectory, since “outcomes are likely to vary considerably in different enterprise, industrial, societal and capitalist settings”.

Indeed recent research from Uganda (UWEA 2011) suggests that East African women flower workers’ conditions have improved substantially since the early 2000s. An important trigger was the European and UK-based advocacy campaigns which put women flower workers’ poor working conditions under the spotlight. A recent study by the Uganda Workers’ Education Association (UWEA) shows how cooperation between workers on flower and vegetable farms in Uganda with WFW and UWEA, has been effective in responding to the demands of (especially) women workers (UWEA 2011).<sup>66</sup> Even though women constitute 62.56 per cent of the total workforce on the farms surveyed, they make up only 31.58 per cent of supervisors and 8.16 per cent of senior managers. Yet with the help of unions, workers negotiated a collective bargaining agreement with the Uganda flower Exporters Association, which has resulted in drastic increases in workers’ rights and protections. Union membership has increased from 23.1 per cent in 2007 to 56.1 per cent in 2010, with women constituting 62.87 per cent of the total union membership. As a result, members have advocated successfully for 60–65 days of paid maternity leave; 48-hour work weeks and paid overtime; free/subsidized health care; free farm-based crèches; occupational health and safety polices; sector Savings and Credit Cooperative Organizations to allow workers to save; and a cooperative social security fund to which 57.23 per cent of the total workforce contributes (workers contribute 5 per cent, and employers contribute 10 per cent). While conditions are still not universalized and the survey sample was small, the results are still heartening.

Such instances of success notwithstanding, there are a number of structural and political obstacles that confront labour activists. These include the logic of a globalized industry such as garment and NTAE production characterized by ever more competitive subcontracting, where a few large oligopolistic firms are able to extract economic rent from a relatively fragmented and large number of suppliers at the base competing against each other; in these labour-intensive industries one of the few spaces left for reducing costs and remaining competitive is labour. The other constraint is the difficulty of organizing labour. As Hale and Shaw (2001) warn, any attempt to improve labour conditions on a long-term basis has to be based on workers’ own awareness and organizational ability. “The problem is that the same processes operating against the implementation of codes of conduct are also operating against effective worker organization”: highly casualized and dispersed labour forces that are often subcontracted and temporary (Hale and Shaw 2001:525). However, as the Ugandan case illustrates, such obstacles can be overcome when the right political context and organizational capabilities are in place to make a change.

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<sup>66</sup> We are grateful to Barbara Evers for bringing this study to our attention.

One of the reasons why the risks and benefits of globalization have been so unequally divided between labour and capital is that labour organizations have lost the bargaining power they once had. Under the circumstances, other forms of organizing are emerging, and some of these involve trade unions.

- While traditional trade unions may have lost some political clout due to declining membership, in the context of democratization new forms of organizing for both labour rights and subsistence needs have proliferated.
- Non-traditional forms of political mobilization (such as informal workers trade unions, social movement unionism, NGOs) that struggle for informal workers' interests have emerged at multiple levels (for example, local, national, transnational).
- The heterogeneity and dispersion of informal workers raises challenges for the formation and scaling-up of collective action.
- Global production chains have provided another space for diverse forms of activism and alliance-building on workers rights.
- The limited, top-down and "soft" agenda of private voluntary regulation, which typically involved a few companies and a limited range of issues, has evolved to encompass more companies/industries, different organizations representing labour interests, and a broader set of issues, including labour rights.
- Despite some efforts to extend the monitoring of labour conditions beyond the parent firms and affiliates, it has been difficult to include the large numbers of women who work as temporary, contract, and homeworkers due to both structural and political constraints.

## 7. Conclusions

This paper has examined the gendered effects of globalization on employment and social protection. It has reviewed evidence on the interconnections between policies associated with globalization, on the one hand, and gendered structures of labour markets and systems of social protection, on the other. Three key questions were examined:

- How does globalization affect access to employment and employment outcomes by gender?
- What are the constraints to improved economic and social outcomes for women? and
- How effective are policies and practices designed to overcome constraints and improve labour market outcomes for women?

This section summarizes key findings of the paper, identifies gaps in existing research and evidence, and – based on existing evidence – suggests recommendations for policy.

### ***Summary of key findings***

Processes of globalization have coincided with women's increasing labour force participation.

***However, the same period has also seen persistent gender segmentations in labour markets and gender-based inequalities in earnings and in the division of unpaid reproductive work. This has occurred in a general context of rising income inequalities within most countries, growing labour market informalization, and rising insecurities.***

The macroeconomic policy changes associated with globalization have been:

- Financial liberalization (opening capital accounts);
- Trade liberalization (reducing tariff and non-tariff barriers) ;
- Fiscal restraint (balanced budgets, austerity) ;
- Public sector reforms (downsizing and outsourcing); and
- Labour market liberalization (reducing government regulation).

The negative outcomes of this macroeconomic agenda have included disruptions to household incomes and livelihoods in the context of recurrent financial crises, and job losses due to competition from cheap imports and public sector downsizing. These factors have pushed many workers, but disproportionately women, into low-paid and precarious types of employment. Many workers are new or young cohorts who have never benefited from social protection mechanisms; others have lost entitlements that came with previously held formal sector jobs as their jobs were informalized.

The severe shortcomings of the macroeconomic policy agenda to generate employment and eradicate poverty led to renewed interest in social policies and social protection programmes. The so-called post-Washington consensus that took shape after the turbulent crises of the 1980s and 1990s (especially the East Asian crisis of 1997) thus came to embrace some of the concerns that had been voiced by critics, such as poverty reduction, social protection and good governance. Yet this happened without abandoning the orthodox macroeconomic policy agenda that was centred on economic liberalization, fiscal restraint and a nimble state that facilitates the integration of people into the market.

With the rising prominence of the social protection agenda, many governments have taken steps to address the social fallouts of economic liberalization that keep many people – especially women – in poverty, despite long hours of paid and unpaid work.

*The extent to which social protection mechanisms are inclusive of women depends on how they are designed, financed and implemented.*

Governments have shown particular interest in social assistance programmes, especially cash transfer schemes, which sometimes target women (usually on behalf of their children).

*However, cash transfer schemes should be seen as one component of a much broader set of social protection instruments. They should not replace the public provision of essential goods and services.*

For many developing countries attaining gender equality requires the strengthening of publicly accountable systems of mutual assurance against entitlement failure.

This means:

- investing in well-functioning and accessible **public health, education, and care services**; if these services are adequately financed, they can also become a source of decent employment (for women and men);
- public provision of a range of complementary goods and services such as **clean water, subsidized food items, sanitation, electricity, transport and housing**; such provision can also reduce the drudgery of unpaid domestic work that is very often disproportionately assigned to women and girls; and
- **broad-based and redistributive social insurance programmes** (for unemployment, old age, maternity).

However, while social protection has been given greater policy prominence (although rarely the level of financing that it needs), the orthodox macroeconomic policies did not disappear, but continued as a part of a broader agenda. Gender equality needs to be a central concern as the macroeconomic policy agenda that sets the parameters within which other policies are designed, is revised. This is necessary if new patterns of growth and employment generation are to become inclusive of women.

### ***Recommendations for policy***

The orthodox policy approach of tight monetary and fiscal policies, and free trade and capital flows, has not proved to be conducive for either widespread development or extensive improvements in well-being and in gender equality.

***There is growing support for alternative macroeconomic policies that, while aiming for macroeconomic stability, take more heed of development and social goals.***

Changes in policy direction would include:

- monetary and fiscal policies that are more expansionary;
- taxation policies that provide governments with adequate revenues to fund social expenditures and repair the erosion of the protective capacity of the state;
- policies that pursue selective strategic liberalization of trade and more emphasis on production for the domestic market to reach a better balance between export orientation and domestic consumption; and
- regulation of capital flows so to avoid excessive volatility in employment and exchange rates.

More precisely, trade and FDI policy must serve as a tool of development, rather than to pursue the liberalization of trade and capital flows as ends in themselves. Moreover, a variety of policy measures often referred to as “industrial policy” are essential to promote transition from an economy tied to the vagaries and limitations of over-emphasis on the production and export of commodities and labour-intensive low-value manufactures.

Nevertheless, such changes in macro policy, while more likely to foster growth, development and structural change, are not guaranteed in and of themselves to improve women’s well-being or, more particularly, to promote rapid progress in gender equality. The extent to which economic growth, structural change and technological upgrading expand women’s work opportunities and income-generating capacity depends on two crucial factors.

First, if economic growth is to be broadly shared, it is necessary to introduce a set of labour market policies and related interventions that can affect wages and working conditions in diverse employment situations. These should not only enhance the capabilities of workers to capture some of the gains, but also rectify gender imbalances and discriminatory practices.

- Wage workers and the self-employed both need better social protection, through registration of enterprises and registration in social insurance programmes (for health, maternity and old age).
- Legislation on minimum wage (indexed to inflation) and anti-discrimination can be other useful tools for wage workers; but this requires strengthening of government regulatory capacity and collective bargaining.
- Regulation of working conditions, health and safety are other aspects that would require greater regulatory capacity on the part of the state and workers’ organizations/trade unions.

Second, governments must strengthen publicly accountable systems of mutual assurance against entitlement failure. This means investing in areas such as well-functioning and accessible public health, public education and public care services that can also become a source of “decent” employment; broad-based and redistributive social insurance programmes; and public provision of a range of complementary goods and services such as clean water, subsidized food items, sanitation, electricity, transport and housing. These elements would in fact constitute a “wage-led” and “employment-led” strategy, in the sense that the focus of macroeconomic policy would be on generation of decent work and on improving social conditions, and not on income growth per se.

### *Gaps in research*

In preparing this paper we have identified a number of important research gaps that need to be addressed to ensure gender equitable employment outcomes:

- Post-2008 crisis, how are **macroeconomic policy agendas** changing and what are the likely implications for gender equality? What are their impacts on both women's paid work and unpaid work?
- How are labour markets changing in this post-crisis context (e.g. southern Europe)? Are labour markets in countries significantly affected by the crisis undergoing **informalization**, as in previous crises? What are their gendered outcomes?
- How are export-dependent developing countries responding to the **reduced demand for manufactured exports** (as high-income countries go into recession) and how are women in export-oriented sectors coping with the outcomes?
- What policies are those developing countries pursuing to **re-balance their production toward domestic demand**? What opportunities does this offer women?
- For agrarian countries and those dependent on commodity exports, what new opportunities or constraints does the rise in the demand for commodities from emerging economies create for women?
- The paper has highlighted the important role of **public sector employment**, especially for women, and the potential role of the public health/education/care sector as an employment engine (for women in particular). What is happening to public sector employment? Is outsourcing and informalization of public sector employment intensifying? What are its gendered effects?
- There is emerging evidence from several Latin American countries, most notably Brazil and Uruguay, that suggests significant recent reversals both in long-term trends of income inequality and in labour market informality. This raises a number of significant research questions: first, through what combination of policy mechanisms have these improvements been achieved? And more specifically, has the process of formalization impacted on both women and men equally? Are gender wage gaps being reduced? And more importantly, do these countries offer alternative models of development, and if yes, what are the key components of their strategies (macroeconomic, social policy/social protection, and labour market policies)?
- While there has been a feminist critique of the growth trajectories of some East Asian "tigers" such as South Korea, do other East Asian countries such as China and Vietnam offer a different model that is more gender-equitable?
- The paper has said very little about specific **policy instruments regulating labour market conditions**, for example the role and impact of minimum wage legislation or anti-discrimination legislation, in conjunction with or separate from mandatory social insurance. New policy developments around the regulation of domestic workers may provide a useful entry point for exploring some of these issues and their extension to a less formal workforce.



## Appendix: Data and Analysis Covered by Literature Review

### ***Multilateral organizations***

Data and analysis of globalization's impact on employment and its gendered dimensions, and social protection have been well-documented by international organizations such as the ILO, the World Bank and the OECD. In particular, the ILO has given a strong focus to gender and employment, including in the informal sector.

### ***Policy-relevant research and advocacy institutions***

Organizations such as the Political Economy Research Institute (PERI, University of Massachusetts, Amherst), Women in the Informal Economy Globalizing and Organizing (WIEGO), the Levy Economics Institute of Bard College, and the Institute for Research on Labour and Employment (University of California at Berkeley) use primary and secondary sources to compile comprehensive reports which have been used in the analysis of women's labour market outcomes. Given UNRISD's own research programmes on both gender and social policy over the past decade or so, it also proved useful to draw on its peer-reviewed publications (as UNRISD programme papers and co-published volumes) which reflect the work of an extensive global network of scholars and research, especially from the South.

### ***Academic publications***

This paper has utilized a number of rigorous, peer-reviewed academic journals, ranging from mainstream economic journals such as *World Development* and *International Labour Review*, to publications that are specifically focused on the gender dynamics of economic and social processes and policies such as *Feminist Economics*, *Social Politics*, *Signs*, *Development and Change*, *Global Social Policy*, and *Politics and Society*. Given the paper's focus on gender, the paper leans in particular on the second set of journals where it is easier to find publications with a strong gender content.

### ***Externally commissioned background papers***

Two review papers were specifically commissioned as inputs to the larger report: one on macroeconomic policies and their implications for gender equality (Braunstein 2012); and the other on the gender implications of pension reform in Latin America (Arza 2012). As experts in their fields, the authors knew the literature best and therefore could draw on relevant data sources, and provide rich analysis and a deep understanding of the debates in their specialized domains. Two shorter literature reviews were prepared in-house on the topics of public employment programmes and informal workers' organizations (Goulding 2011a, 2011b).

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