



COVID-19 and Women's Economic Participation

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A rapid analysis on Covid-19 and implications for women's economic participation

For 'Investing in Women', an initiative of the Australian Government

This report provides:

- An **overview of common themes** emerging around the implications of COVID-19 on women's economic participation;
- **Recommendations about risks and opportunities for IW** in the areas of women in the workplace, women entrepreneurs and gender norms;
- **Potential areas for further rapid analysis and research** around COVID-19, gender equality and women's economic empowerment.

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Executive Summary

Method

- A rapid but extensive review of grey and academic literatures highlighted critical gaps in the literature on the COVID-19 crisis and women's formal employment in Indonesia, Philippines, Vietnam and Myanmar.

What do previous recessions and pandemics tell us about the impact on women's economic position?

- The findings of the academic literature on recessions and pandemics are unequivocal, with consistent common themes: women's economic security, participation in formal employment, political representation, health outcomes and educational achievement is negatively impacted by economic and health crises, and more so than men's. These outcomes have a long-term negative impact on women's human capital formation and economic security.
- Further, economic and health crises exacerbate pre-existing inequalities and set gender equality back.
- The negative consequences of economic and health crises on women are compounded by the systematic lack of women's participation and leadership in crisis response and recovery strategies and the failure to include gender-specific analyses in these strategies.
- Recessions have two phases – the immediate and the recovery. The recovery period following recessions is estimated to be 3–7 years and previous crises demonstrate that a lack of attention to gender equality in national and business response recovery strategies will set gender equality back decades.
- Analysis of the risks to women's economic security and wellbeing during economic crises must focus on the interaction between the demand and supply of women's paid and unpaid labour, the conditions of employment and government policy settings.

Women and COVID-19

- The COVID-19 crisis is more significant than previous economic or health crises in both depth and scope with social distancing measures producing the 'great lockdown' of global social and economic activity. This has resulted in severe restrictions on movement of people and goods both nationally and internationally. Women have been impacted immediately and are likely to be more adversely affected in the longer term unless gender progressive interventions are made.
- The highly feminised retail, hospitality and textile manufacturing sectors face global decline in demand. Women have been profoundly impacted economically by the immediate loss of employment, hours of work and pay, leading some to describe the impact of COVID-19 as a 'shecession' as opposed to the 'mancession' of the GFC.
- Healthcare workers are in high demand and face expanding employment opportunities in high risk contexts.

- Women’s social and physical vulnerability has increased due to increased risk of infection among frontline healthcare and associated workers, restrictions on trade, and the sudden return to the household and intensification of unpaid domestic and care work.

Post-COVID-19

- There are opportunities post-COVID-19 to embed gender equality at the centre of national recovery strategies in line with the global commitment to improving women’s workforce participation (G20, 2017).
- Businesses that embed gender equality into their COVID-19 response strategies will make productivity gains as well as benefit from the normal insights, talent and perspectives that diversity provides, creating ‘shared value’.
- Gender equitable recovery strategies will also boost national productivity, deliver inclusive growth, and underwrite the Sustainable Development Goals 2030. These strategies should include policy measures that support women’s formal employment opportunities, women’s entrepreneurial activity, and unpaid care work.

COVID-19 and the IW Countries

- There are specific impacts for each of the four IW countries: Indonesia, Philippines, Vietnam and Myanmar. The labour markets in each country are segmented in many ways: by formal and informal work, by industry and occupation, and by gender. This segmentation will influence the effects on women and should also be considered when adopting recovery strategies.
- In all four countries, women are highly represented in industries affected by job losses and contraction of working hours caused by COVID-19. Retail, tourism, and textile and garment manufacturing have all been severely impacted in Indonesia, Philippines, Vietnam and Myanmar.
- Vietnam and, to date, Myanmar appear to have been more successful in containing COVID-19 with government strategies enacted early to limit movement across borders and internally. Thus, the impact on health workers in these two countries may be different from that in other countries.
- Women dominate the health and human services sectors in all four countries (and globally), and while health workers represent a relatively small proportion of the total workforce in each country, they are exposed to the direct health risks of COVID-19, often without adequate personal protective equipment and for very long hours, vulnerable to infection and worried about passing infection to their families.
- To prevent winding back of gender equality measures and a return to privileging male breadwinner–female carer norms, targeted responses are required in each country and company associated with the IW program.
- Governments in IW countries have introduced a broad range of policies but these policies are not gender specific, suggesting government policy makers are largely not alert to the gendered impact of COVID-19 and the consequent recession. The impact of COVID-19 on women’s employment in the IW countries requires further investigation, particularly the impact on formal employment and the interface with informal employment.

Areas for Further research

Areas for further research in IW Countries are identified as:

- the interaction between the formal and informal economy during and post COVID-19
- women's economic position in informal employment, as micro-entrepreneurs and as migrant workers.
- women entrepreneurs and the impact of supply chain disruption
- case studies of good business responses to women's employment during and post COVID-19
- the impact of COVID-9 on the gender division of labour in the home
- collection of gender disaggregated data of the impact of COVID-19

Method for the rapid review

This project adopted a 'rapid review' approach to the available academic and grey literature on gender and COVID-19 during April 2020. We used top news stories on Google to develop a map of the emerging literature before a more focused ProQuest review, as well as a formal review of the academic literature on Google Scholar. Given the rapidly changing crisis, and the constant stream of new gender-related content, it was important to use all search engines. The rapid review made selective use of reliable grey literature (reports from governments, global institutions and research institutes, media and blogs) and academic literature on gender and previous economic and health crises.

Search engines and databases were saturated with COVID-19 content on gender, women and employment. On 26 April 2020, there were 2,660 million Google hits for 'COVID-19 AND women' and 196 million hits for 'COVID-19 AND gender AND employment'. It was clearly beyond the scope of this project to investigate every relevant source. We focused on top news stories, such as the first 5–10 pages of Google hits, to identify the most recent stories on gender and employment in the COVID-19 crisis. When needed, follow up searches were undertaken to clarify points of interest.

The ProQuest database search also yielded a high number of COVID and gender-related content, albeit not on the same scale as Google. There were 101,465 hits for 'COVID-19 AND women' but 'COVID-19 AND gender AND women' generated comparatively few results at 611. As with the Google search, it was beyond the scope of this project to follow up all promising leads. Thousands of hits focused on the gendered impact of the crisis on political participation, domestic violence, health, and access to education, all of which will have a critical impact on economic participation during the recovery period and beyond. However, in line with the concept note, we focused on the pandemic's current and predicted future impact on women's formal employment participation. Our search results were selectively filtered to reflect this narrower focus.

Our rapid review method required flexibility to source relevant information on the IW project countries: Indonesia, Philippines, Vietnam and Myanmar. Search terms, on both Google and ProQuest, were altered to identify country-specific evidence (eg, 'COVID-19 AND gender AND Vietnam'). We moved between Google and ProQuest to follow up any promising leads. For the IW project countries, publications on gender, work and employment by key international and national agencies, such as UN Women, UNDP and ILO, were prioritised.

Our preliminary research findings on target countries show there is coverage on national COVID-19 responses but minimal information on short- to long-term impacts on women's employment prospects. The information that is available tends to emphasise either disruption to global supply chains (eg, garment industry) or the informal economy and 'downloading' of unpaid care expectations on women in the household. There was little information on the impact of the COVID-19 crisis on women's economic participation and opportunities in formal employment or entrepreneurs who were not micro-entrepreneurs.

In summary, our rapid review revealed robust quantitative and qualitative research literature on the impact of past economic and health crises on women's economic participation. However, there are critical gaps in the literature on the COVID-19 crisis and women's formal employment. Despite the saturation of gender-related content, there is minimal coverage of the short- to long-term impacts of the pandemic on women's employment in IW project countries. This reflects both the early stages of the crisis and that available information is also in a 'rapid review' format, meaning there are very few if any substantive evaluations available. These gaps show that COVID-19's impact on women's employment requires urgent investigation, particularly the impact on formal employment.

Economic crises and women's employment

It is well established in the academic literature that women and girls are disproportionately vulnerable to economic shocks compared to men, and that economic crises exacerbate pre-existing inequalities and set gender equality back (see, Antonopoulos, 2009; Blanton et al., 2019; Floro and Dymski, 2000; Floro et al., 2009). Recent literature highlights the protracted nature of the gendered impact of economic crises with negative socio-economic effects, including unemployment, likely to persist for up to seven years after the end of a crisis (Blanton et al., 2019: 943). Economic crises undermine gender equality on multiple fronts including women's political representation, health and access to education (Blanton et al., 2019; Floro et al., 2009). A decline in women's political leadership has negative implications for gender sensitive policy making in the labour market. However, economic crises are not uniformly harmful – the scale and depth of the crisis matters, and long-term or multiple crises have a stronger negative impact on women's socio-economic equality and economic security.

In a recent systematic meta-analysis Blanton et al. (2019) evaluate the impact of economic crises on women in 68 countries between 1980 and 2010. The quantitative analysis focuses on five types of financial crisis including banking crises, currency crises, domestic sovereign debt crises, external sovereign debt crises and inflation crises. The study confirms earlier findings that women fare worse than men in economic crises, partly because they hold fewer assets, earn less money and face labour market discrimination (Blanton et al., 2019: 943 quoting Calardo, 2017). The meta-analysis focuses on the negative impact of economic crisis on women's employment in the formal sector and political representation (as well as access to health and education) and identifies the extent to which this negative impact deepens according to the number of crises experienced. The strongest impact is felt three years after a crisis and sustained for up to seven years post crisis (Blanton et al., 2019: 943–947). This is an important finding given the depth and reach of the COVID-19 crisis, as the pandemic threatens women's health (as healthcare employees and unpaid care workers) and also undermines employment in feminised industries.

Global literature shows that financial crises are significantly associated with fewer female workers in the formal labour force and that the impact is more significant the greater the depth of the crisis. Econometric analysis shows that in cases of multiple economic crises women's formal employment rates decrease approximately 6% relative to men's with women's predicted share of the total labour force decreasing from 39.3% to 38.9% in countries that experience one type of financial crisis, and from 39.3% to 37.0% in countries that faced all five crisis types in a given year (Blanton et al., 2019: 958). Evidence from the Asian financial crisis also shows that economic crises and structural adjustment policies affect women's and men's employment disproportionately. For example, in Thailand women were 50–60% of the unemployed, and in Indonesia 46% of the unemployed were women even though they constituted only slightly more than one-third of the labour force (Aslanbeigui and Summerfield, 2000: 87). In South Korea, women's employment also fell substantially compared to men's with women representing 75% of the discouraged workers and 86% of the retrenched workers in the banking and financial sectors (Aslanbeigui and Summerfield, 2000: 87). In addition to the quantitative decline in women's employment, economic crises also have a negative impact on labour rights, evident up to five years post-crisis (Blanton et al., 2015).

But why are women vulnerable to economic crises? First, pre-existing gender inequalities mean that women have less access to productive resources than men, including access to education, land, technology and financial resources. This translates into lower earnings and bargaining power. In terms of economic autonomy, these structural inequities limit women's ability to develop their capabilities, make strategic choices and participate on equal terms with men in the economy (Floro et al., 2009). These trends leave women at greater risk both during and in the aftermath

of economic crises (World Bank, 2001). Gender-segmented labour markets play an important role in this inequitable framework. Even where women are engaged in paid work, they are over-represented in jobs with lower wages and poorer conditions, leaving them economically vulnerable and without any reserves to weather an economic crisis. Early indicators of the impact of COVID-19 in Australia are showing this to be the case, with unemployment rising faster for women and access to full-time jobs lower for women than men. This is 'very different to past economic downturns which have tended to disproportionately impact males – particularly older men – harder because the economic hit was primarily to cyclical sectors like construction and manufacturing with the services sector holding up much better' (FWX, 2020). Consequently, some commentators are describing this as a 'shecession', as opposed to the 'mancecession' of the global financial crisis.

Second, basic labour market vulnerabilities of women are reinforced by the sexist attitudes of employers, who regard women as 'secondary earners' and use this as a pretext for early dismissal when times are tough (King and Sweetman, 2010). The literature on financial crises in Europe, Southeast Asia and Latin America shows that employers often lay off women in disproportionate numbers during a crisis and that recovery strategies include giving employment priority to men. This reflects what Elson (2002: 12) calls the 'male breadwinner bias' that is also reflected in the post-crisis implementation of strong gender stereotypes around 'men's' and 'women's' work (Baird et al., 2012; Elson, 2013). In times of economic crisis and high unemployment, there is an assumption that men have a stronger claim to jobs than women. This reflects the powerful impact of traditional breadwinner and homemaker roles, in which men are assumed to support their families in paid work while women assume the role of unpaid care workers. But how gendered patterns of employment shape labour markets during the crisis and recovery period vary. Jill Rubery's work on gender and recession shows that national patterns of women's relative position in the labour market, the welfare system, attachment to employment, social norms and household arrangements all influence women's employment experience during economic crisis and recovery (Rubery and Rafferty, 2013: 415).

Third, government policy reinforces women's economic vulnerability in the post-crisis 'recovery' stage. Tight fiscal policy is a common response to economic crises as austerity and adjustment measures dominate national budgets. This includes the deregulation of labour markets, privatisation of public infrastructure and public services, and liberalisation of trade and finance markets. This suite of common austerity policies leads to a contraction in public sector employment, a rise in the cost of living and an expansion in informal employment (Connelly, 1996; Floro et al., 2009; King and Sweetman, 2010; UN, 1989). For example, economic crises in Latin America in the 1980s saw informal employment expand by 18% between 1981 and 1983 and another 24% between 1983 and 1987 (Bonilla, 1990). This shift in the composition of employment is strongly associated with the degradation of employment conditions, reduced wages and limited access to social protection – all of which have a disproportionate impact on women as paid workers and as unpaid carers (King and Sweetman, 2010).

Economic crisis and the quality of women's employment opportunities

Empirical studies show that women's entry into the formal labour market was accelerated in the 1980s and early 1990s by stabilisation and structural adjustment policies in response to the 1980s debt crisis and the Asian financial crisis (Connelly, 1996; Lim, 2000). Strategies to stabilise the economy often included expansion in export-led industrialisation. The rise of labour intensive, low skilled, export-orientated industrialisation, often in newly assigned Export Processing Zones (EPZs), delivered new opportunities for women's formal employment. While there were many benefits for women in these new formal employment opportunities, employment

was typically very poorly regulated and included long hours, poor health and safety standards, inadequate social security provisions, few chances for advancement and long-term job security, and often no right to organise. These were the conditions that drove rapid global growth in feminised low-wage employment.

Economic crisis and the intensification of women's total labour

Structural adjustment and austerity measures increase the cost of living as public services are privatised and government subsidies on essential services and inputs such as food, health, education and fuel are reduced. This intensifies women's double burden as the need for more paid work escalates at the same time as the unpaid care and domestic load increases. Austerity measures which cut public services make women providers of last resort as economic risk is formally 'downloaded to the kitchen' (Elson, 2002). For example, during the Asian financial crisis, government policies in Indonesia in response to the crisis increased paid and unpaid work for men by only 1.3%, compared to the 7% increase for women (Elson, 2002: 7). In the Philippines, women's mean weekly hours of total (paid and unpaid) work rose more than men's, even with increased unemployment (Lim, 2000). Lim concludes that Philippine government policy settings aggravated gender disparities in total work hours (paid and unpaid work) producing 'overworked' women and 'underworked' men (Lim, 2000: 1305). The intensification of the double burden of work and care has a compounding effect on women's economic insecurity as care responsibilities limit their capacity to engage in formal employment, even if available. Informal employment, especially home-based work, is often the only feasible way for women to manage work and care, leaving many with little choice but to accept the associated very low wages, insecurity and poor working conditions (Cassirer and Addati, 2007; Hill, 2018; Lim, 2000).

Understanding the risks to women's economic security and wellbeing during economic crises requires sophisticated analysis of the interactions between the demand and supply of women's paid and unpaid labour, the conditions of employment, and government policy settings (Rubery and Rafferty, 2013). How these trends play out in specific countries and during specific crises depends explicitly on the composition of the economic crises – especially which sectors are hardest hit. For example, the global financial crisis was initially described as a 'mancession' because it hit male-dominated sectors, such as construction and manufacturing, hardest (Elson, 2013). In the US, jobs held by men accounted for more than 70% of all those lost (Peterson, 2016). However, feminist economic critiques of this narrative show that even if women constituted a majority of the workforce during the global financial crisis, they still earned less than men on average and faced unpaid care burdens outside the workplace. Female-headed households were particularly vulnerable, experiencing a steep rise in unemployment from 8.0% in 2007 to 13.6% in 2009 (Christensen, 2015; Peterson, 2016). During the recovery, men also tended to do better than women as male-dominated sectors were prioritised and occupational segregation kept women concentrated at the bottom of the labour market.

Evidence on the gendered impact of economic crises on women's employment and economic security in times of crisis shows that a lack of female leadership and participation in policy responses further entrenches women's economic vulnerability (UN Women, 19 March 2020). Failure to include gender analysis in the design and implementation of crisis response and recovery strategies leaves women exposed to work intensification and poverty. Gender budgeting is an established tool well suited to assessing short- and long-term policy impacts on gender equality in employment and other wellbeing outcomes (Downes et al., 2017) and has an important role in crisis management (Roy, 2020).

Health crises and women's employment

Globally women are disproportionately employed in the health, care and social services sectors making them first responders in a health crisis (Boniol et al., 2019). Women also do most of the support jobs at health facilities at very low pay, including cleaning, laundry and food services. This makes women, and their households, vulnerable to infection and the associated economic impact of sickness, loss of employment or even death.

Our rapid review focused on available literature on recent health crises directly related to women's employment in the formal sector. We looked primarily at the gendered effects of two diseases: Ebola, an extremely serious infection with less capacity for global circulation, and Zika, concentrated in South America and the southern states of North America. There was scant relevant literature available on SARS and we did not include HIV/AIDS in our search as its profile and impact was less applicable to the current crisis. However, it is important to note that Ebola and Zika are also very different to the COVID-19 crisis, as both were geographically constrained compared to the global reach of COVID-19. In addition, the economic effects of Ebola and Zika were not nearly as catastrophic as COVID-19 has already been.

The literature on health crises includes very little analysis of the impact on women's formal employment. Most analysis is on the impact on women's employment in the informal economy, as this is the most significant issue in the countries impacted by Ebola and Zika. However, there are some insights to be gained. In terms of macroeconomic impact, economic growth in 2014 declined sharply in the Ebola crisis: from 4.5% to 1.6% in Guinea; from 5.9% to 1.8% in Liberia; and from 11.4% to 7.4% in Sierra Leone (Davies and Bennett, 2016: 1047). In terms of gender, Ebola had a disproportionately high impact on women, due to their concentration in the smallholder farming sector (Davies and Bennett, 2016: 1048; see also, Harman, 2016; Seymour, 2016). For example, in Liberia, women constituted 85% of market traders (Davies and Bennett, 2016: 1048). The economic impact of the Zika outbreak was also burdensome for women. Female-headed households reportedly shouldered a heavy productive and reproductive burden to source income and medical care in a context of worsened employment opportunities and inadequate public health systems in the most affected countries (Doctors of the World and Oxfam, 2017).

Literature on health crises points to a structural failure to address the specific needs of women or to include them in the development of crisis responses, leading to male biased policy initiatives (see Harman, 2016). The lack of women's participation in policy making meant little attention was paid to the gendered impact of disease, and data was not disaggregated by sex. The absence of women in global health governance had serious implications for women's wellbeing (Harman, 2016). For example, the diversion of resources to Ebola response efforts left women vulnerable to reduced healthcare access, particularly maternal and reproductive care. Affected countries had a sharp decline in maternal and child health indicators, including an increase in the maternal death rate, with some reports of a 70% increase across the region (Jones et al., 2016). Reduced access to essential reproductive and maternal health services has a significant long-term impact on human capital formation and employability (UNFPA, 2020; Wenham et al., 2020).

While Ebola and Zika are different from COVID-19 in terms of global spread and economic impact, there are important lessons from these earlier health crises. First, it is critical global health responses adopt gender-mainstreaming in all crisis policy initiatives. In times of crises, there is a tendency for a 'tyranny of the urgent' to take over (Davies and Bennett, 2016: 1044). This means governments and global health authorities 'put aside for "later" the structural issues ... [which] further compounds those inequalities' (Davies and Bennett, 2016: 1044). It is also critical for response initiatives to recognise the gendered risks within the health sector. This includes women's role as primary carers who find themselves with extra care responsibilities, which may lead to

loss of employment due to lack of leave provisions. Finally, many of the women on the frontline of a health crisis are in jobs that are relatively low paid and intense, due to the likelihood of over-work and a lack of required safety and essential equipment. The WHO calculates a current gender pay gap in the health sector of about 28% (Boniol et al., 2019). The concentration of women in the frontline health workforce has received much attention with the UN Secretary General Antonio Guterres noting, 'nearly 70 per cent of frontline health and social workers are women. Women also shoulder a disproportionate share of unpaid care work and they are critical actors in the sustainable development of all countries' (UN News, 2020).

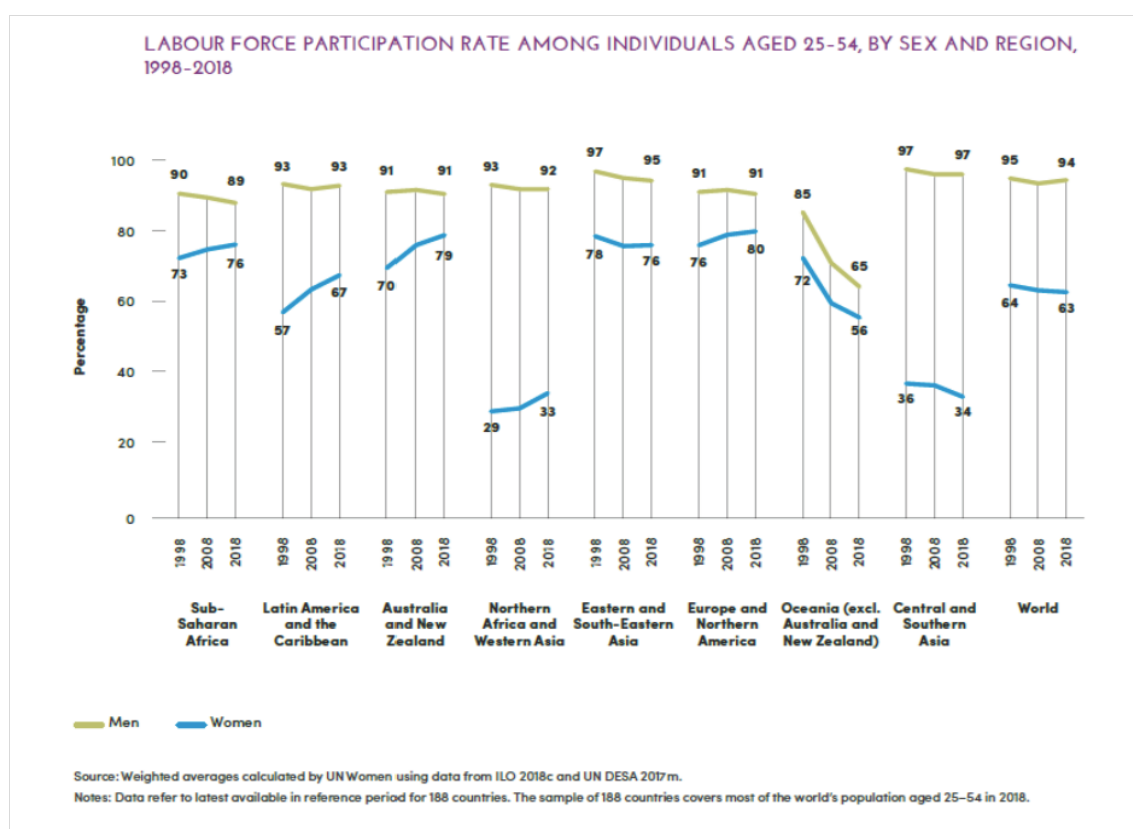
COVID-19: Women's employment during the 'great lockdown'

The COVID-19 crisis is more significant in scale and different in structure to all previous health and economic crises. It is a health crisis that immediately translated into a global economic crisis. The health requirement for social distancing saw governments around the world quickly opt for policies of lockdown: closing national borders, requiring workers to work from home where possible, and shutting businesses that rely on close social interaction including all arts and entertainment, tourism, restaurants, cafes and gyms. The great lockdown produced an immediate and simultaneous contraction in economic demand and supply that was global in reach and completely ruptured the international economy.

The IMF's April World Economic Outlook projects global growth in 2020 to fall to minus 3% (Gopinath, 2020). This will make the great lockdown 'the worst recession since the Great Depression, and far worse than the Global Financial Crisis' (IMF, 2020). Unprecedented action to prevent widespread firm bankruptcies, job loss and system-wide financial collapse of about US\$8 trillion backed up by massive liquidity injections by central banks means the IMF projects annual global growth will rebound to 5.8% in 2021. However, estimates of the cumulative loss to global GDP over 2020 and 2021 from the COVID-19 crisis is estimated to be around US\$9 trillion (IMF, 2020). Alongside projections on global growth, the ILO estimates that 1.25 billion workers, almost 38% of the global workforce, are employed in sectors that are exposed to a severe decline in output and a high risk of workforce displacement (ILO Monitor Second Edition, 7 April 2020).

Evaluation of the immediate impact of the COVID-19 crisis on women's employment must be located within the pre-crisis context in which, globally, women's labour force participation has been quite steady. Over the past two decades global labour force participation for women between 24–54 years has declined slightly from 64% to 63%, and from 78% to 76% in East and Southeast Asia (see Figure 1). This has occurred at the same time as the global and regional commitment to increasing women's labour force participation and economic empowerment has become a mainstream policy concern (G20, 2017; McKinsey Global Institute, 2015, 2018) and embedded in the global Sustainable Development Goals 2030. Empirical evidence on previous economic and health crises indicates there is a strong risk that gender equality in employment and economic security will decline in the COVID-19 crisis unless strategic action is taken. The main dynamics influencing women's employment opportunities are discussed below.

Figure 1: Labour force participation rate among men and women aged 25–54 years



Source: *Progress of the World's Women 2019-2020* (UN Women, 2020)

Unemployment

The COVID-19 crisis has already had a devastating effect on employment, working hours and earnings globally making the ILO's most extreme prediction of a total increase in global unemployment of 25 million people likely (ILO Monitor First Edition, 2020). The most recent ILO modelling shows global working hours in the first quarter of 2020 declined by an estimated 4.5% – equivalent to approximately 130 million full-time jobs – and that in the second quarter of 2020 global working hours are expected to be 10.5% lower than in the last pre-crisis quarter, equivalent to 305 million full-time jobs (ILO Monitor Third Edition, 29 April 2020).

The worst affected sectors include retail trade, accommodation, food services, tourism and manufacturing – all of which are highly feminised making women exposed to the heaviest burden of job loss and a prolonged decline in income and labour force participation (Alon et al., 2020; ILO Monitor Second Edition, 2020; Nassif-Pires et al., 2020: 6; UN, 2020). Women in hospitality, services, tourism and export-oriented manufacturing have already been laid off in the first month of the crisis (Durant and Coke-Hamilton I, 2020; UN, 2020) and more are expected to follow. The World Travel and Tourism Council has warned travel restrictions could 'cost up to 50 million jobs in that sector globally, 30 million of them in Asia' (UN Women, Guidance for Action, 2020). Women also make up the majority of temporary workers, who are most at risk of unemployment during economic downturn (Alon et al., 2020; Durant and Coke-Hamilton, 2020).

Global supply chain disruption

The COVID-19 crisis has been particularly disruptive to the highly feminised export manufacturing sector. In Bangladesh, Myanmar, Cambodia and Vietnam thousands of factories closed due to lack of essential supplies from China early in the year and cancelled orders from European and American clothing brands. It is reported that one million garment workers have been let go in Bangladesh, the world's second-largest clothing manufacturer (ActionAid, 2020). In Myanmar, 20 out of 250 apparel factories have had to close leaving more than 10,000 garment sector workers unemployed and, in South Korea, 138 out of 191 import/export-based SMEs are struggling as supply chains are disrupted and the price of raw materials escalates (UN Women First 100 Days, 2020). Similar supply chain disruptions occurred during the global financial crisis, also disproportionately affecting women textile workers. For example, in Ho Chi Minh City in Vietnam 65% of the 31 companies dissolved in 2008 were textile-garment firms (Antonopoulos, 2009). The disruption to global supply chains is widespread, making women some of the most vulnerable workers in the current global lockdown.

Work intensification in the health sector

Women are disproportionately employed in the health sector and associated industries operating at the frontline of the COVID-19 health crisis. The World Health Organization estimates that 70% of the global healthcare workforce are women (Boniol et al., 2019). The issue for many (but not all) health workers has been excessive work and the intensification of risk due to overwork, unsafe conditions and vulnerability to infection – all while earning relatively low wages. There is also concern that the gender pay gap within the health sector may be exacerbated (UN Women The COVID-19 Outbreak and Gender, 2020). Women healthcare workers have raised concerns over their exposure to infection and unsafe working conditions including inadequate access to personal protective equipment (PPE), and menstrual hygiene health (UN Women First 100 Days, 2020: 15-16; Stevenson, 2020). As workers on the frontline of the health response, women are not only disproportionately vulnerable to infection but also carry additional risk of passing infection on to family members, adding to workers' anxiety. There have also been regular reports of abuse, intimidation and harassment of frontline health workers, particularly women nurses (UN Women First 100 Days, 2020: 33).

Women's over-representation in the health sector demonstrates the highly variable impact of COVID-19 on women's unemployment due to the sectoral impact of the economic shutdown. This diversity is important. Healthcare workers are in high demand and face expanding employment opportunities in high risk contexts while the highly feminised service and textile manufacturing sectors face global decline in demand.

Unpaid care work

The COVID-19 crisis has intensified the pre-existing gender division of labour and the feminised double burden of paid and unpaid care work as social distancing strategies across the globe have devolved work, care and domestic duties to the household (UN Women The COVID-19 Outbreak and Gender, 2020). This has produced a crisis in care, particularly where widespread closure of schools and daycare centres has been part of the COVID containment strategy. UNESCO reports that 1.52 billion students are now home (UN Women First 100 Days, 2020). Social norms mean that many women have found themselves responsible for home schooling, even while working from home, caring for elderly family and neighbours, procuring essential household items under the conditions of social distancing and maintaining more rigorous cleaning

regimes (Alon et al., 2020; see also, Bennett, 2020). In some households the intensification of unpaid care and domestic work is reportedly reshaping gender norms with some emerging evidence that fathers are increasing their contribution to unpaid household and care work (Alon et al., 2020; Price, 2020).

Flexible work arrangements

The COVID-19 lockdown has led to widespread working from home (Alon et al., 2020). This has exposed existing patterns of inequality in housing and digital connection (Duke, 2020). Knowledge-based white-collar work is best suited to work from home arrangements, where homes are large enough and internet access is reliable and fast. The gender divide in work and digital access in some developing countries makes this problematic. Women are less likely to have internet access than men in some countries, and women tend to be less connected than men with 327 million fewer women than men owning a smartphone in 2018 (OECD, 2018). Where working from home has been implemented there have been some reports it has driven a more equitable division of work and care (Alon et al., 2020) while others have reported this has contributed to an elevated risk of domestic violence (UN Women First 100 Days, 2020).

The escalation in unpaid care work, working from home arrangements and crisis management in sectors where employment is in high demand has led the European Foundation for the Improvement of Living and Working Conditions to conclude that 'the coronavirus is exacerbating work intensity and gender imbalances in the labour market' (Dow Jones Institutional News, 2020).

SMEs

SMEs have been very hard hit by the great lockdown and the immediate rupture to global supply chains and domestic demand. The ILO estimates around 436 million enterprises worldwide are currently facing serious disruption (ILO Monitor Third Edition, 2020) with a significant impact on workers, particularly in the Asian region where SMEs account for around 96% of all businesses (Yoshino and Taghizadeh-Hesary, 2018). The length of the lockdown and relative exposure to global supply chains will determine the fate of many SMEs. In China 85% of SMEs have reported they will face bankruptcy if significant disruption lasts three months (UN Women First 100 Days, 2020). Women-led SMEs face specific difficulties absorbing the economic shock. With less inventory, a smaller client base, fewer cash reserves and limited credit options in general, women-led SMEs were immediately disrupted by the crisis and will face significant hurdles returning to business as usual (UN Women Guidance for Action, 2020). Regular difficulties accessing financial services and assets, information and communication technology and business networks make women-led SMEs particularly vulnerable, even in the recovery stage. The gender gap between men and women entrepreneurs' access to information about special support for businesses, such as low interest loans, deferred payments and tax exemptions, or how to apply for relief or programs that provide exclusive support to SMEs as a recovery measure, is expected to grow following the COVID-19 crisis (UN Women First 100 Days, 2020).

Investing in Women project countries

COVID-19 is a health crisis and an economic crisis and, as a result, its impacts in each country are different, depending on how it is being contained and managed (see Table 1), and the structure of the economy of each country.

Table 1: COVID-19 data as at 25 April 2020 for IW countries

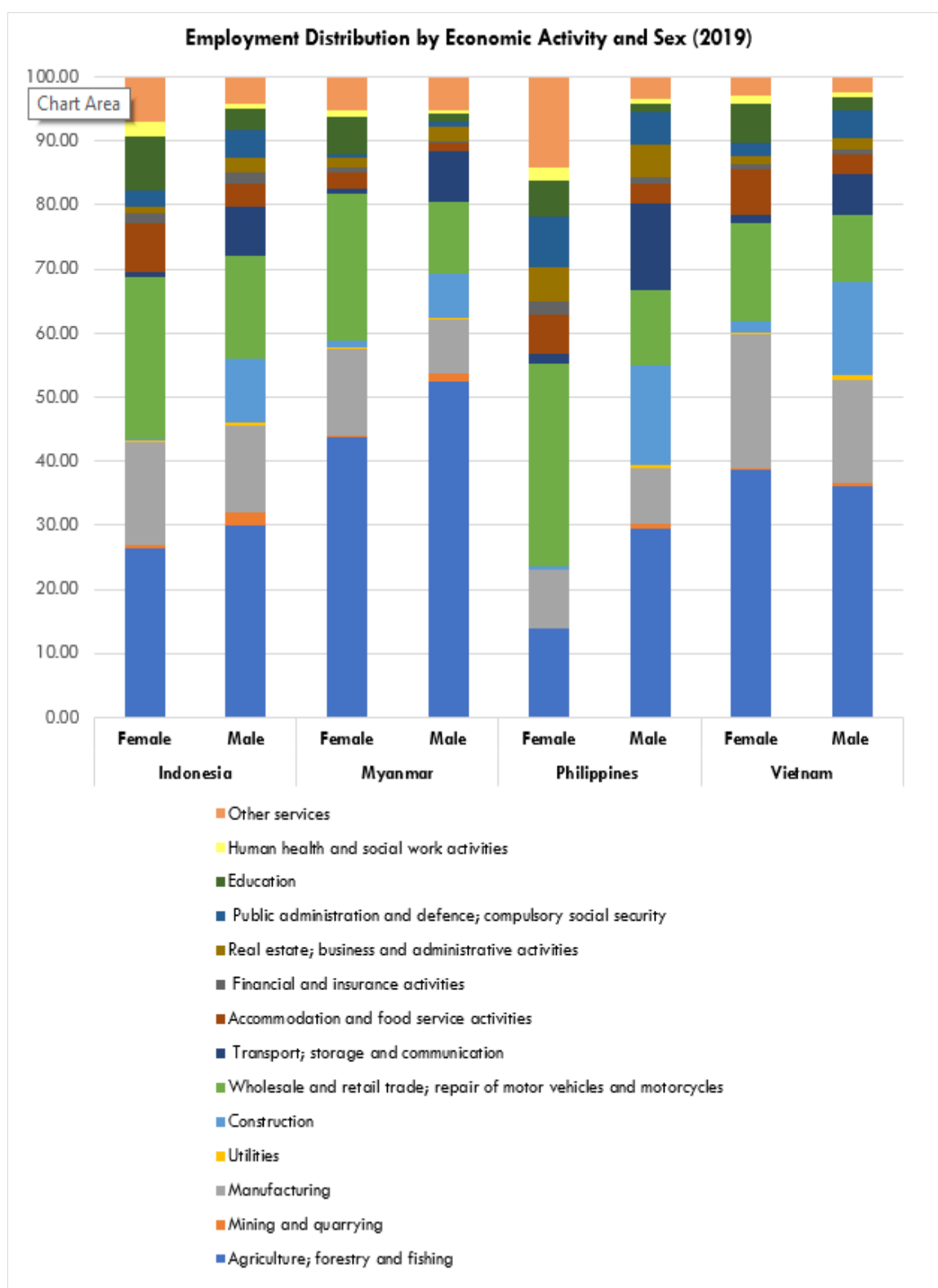
Country	Population	Total confirmed cases	Total deaths	Transmission classification
Indonesia	268,000,000	8211	689	Community transmission
Philippines	107,000,000	7192	477	Clusters of cases
Vietnam	97,000,000	270	0	Clusters of cases
Myanmar	54,000,000	144	5	Clusters of cases

Source: [Coronavirus disease 2019 \(COVID-19\) Situation Report – 25 April](#) (Accessed 26 April 2020)); The World Bank data (accessed 7 May 2020).

The labour markets in each country are segmented in many ways: by formal and informal work; by industry and occupation, and by gender (see Figure 2). This segmentation will influence the effects on women and should also be considered when adopting recovery strategies. In all four countries, women are highly represented in industries affected by job losses and contraction of working hours caused by COVID-19: globally these industries are wholesale and retail trade, hospitality (accommodation and food services) and areas of manufacturing.

There is some variability across the IW countries in terms of the spread of COVID-19 and their labour markets and therefore there are different risk profiles for women in these countries in both the COVID-19 crisis and the recovery. However, in all IW countries, women are more likely than men to be employed in the wholesale and retail trade, and manufacturing sectors, making them highly exposed to the impact of the great lockdown. Furthermore, while retail may improve when restrictions are eased, much of the manufacturing work is linked to global supply chains and these are likely to recover more slowly than the domestic retail trade sector.

Figure 2: Employment Distribution by Economic Activity and Sex, 2019



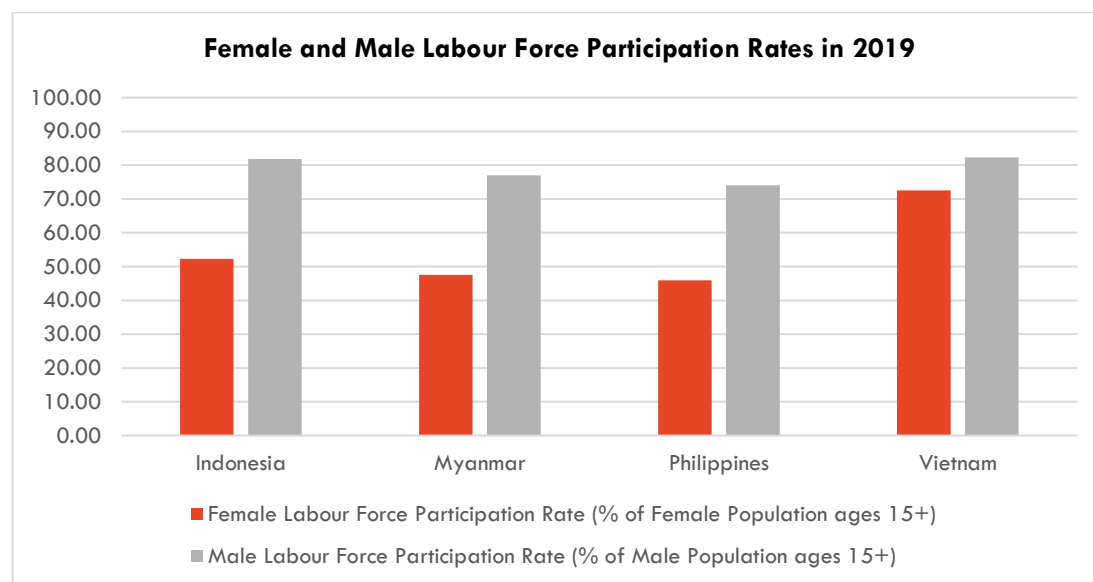
Source: ILO Modelled Estimates (ILOSTAT, 2019)

Labour market impacts

The impact of COVID-19 on women's economic position also varies according to women's existing engagement with the labour market. As noted earlier, economic crises produce differential impacts on sectors and on genders and exacerbate existing gender inequities. Women in the formal sector may be forced into the informal sector or face reduced economic security and conditions in the formal sector. Additionally, their care burden in the home and community is likely to increase.

Across the four IW countries, female labour force participation rates vary (see Figure 3), with Vietnam having the highest rate at 73% and lower rates in Indonesia (52%), Myanmar (48%) and Philippines (46%).

Figure 3: Labour force participation rates by sex, 2019



Source: ILO Modelled Statistics from World Bank Gender Statistics Database, 2019

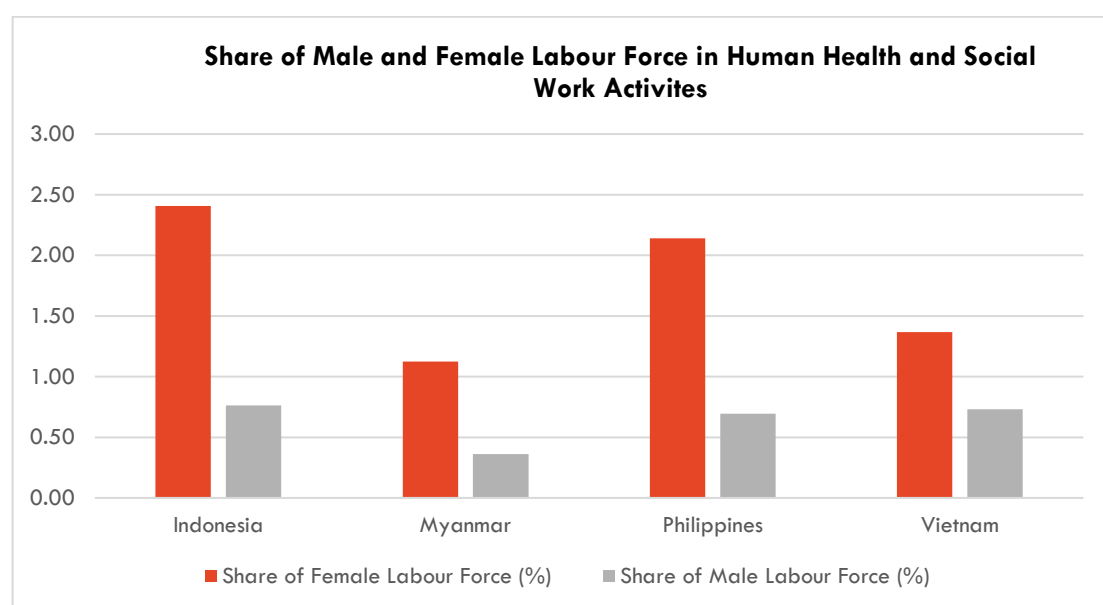
Textile manufacturing has been heavily impacted by COVID-19; supply chains have frozen and demand for products has declined dramatically. For instance, Myanmar's export markets are temporarily frozen, many factories have shut down, primarily in the garment sector where approximately 80% of workers are women. Accordingly, the government has identified several business sectors which will receive immediate support and funding: cutting, making and packaging (CMP), SMEs and tourism. In addition, together with the sectoral associations, the government will start regulating the prices of locally produced basic commodities.

In Indonesia, an estimated 2.5 million workers are employed in the garment industry and most are women. Many orders have been cancelled due to the lockdowns of importing countries and the closure of retail outlets. Varied employer responses have included lowering wages, not extending contracts and rostering workers fewer hours (Fair Wear, 2020).

Health workers impacted

In the Philippines, Vietnam and Myanmar, the human health and social work sector has the highest proportion of women and is the second highest sector in Indonesia after trade and hospitality. Unlike previous recessions and because of its health origins, COVID-19 has had a unique impact on the health sector, putting extra stress and risk on workers both in the short term and the longer term, especially as it continues in IW countries. Despite the health sector being a relatively small proportion of the total workforce in IW countries, COVID-19 is impacting women because of the feminised health workforce (see Figure 4). Worldwide, 70% of health and social service providers are women, and in the Asia-Pacific region 80% of nurses and midwives are women (UN Women First 100 Days, 2020: 15).

Figure 4: Labour force in human health and social work by sex, 2019



Source: ILO Modelled Estimates (ILOSTAT, 2019)

Table 2: Male and female labour force in human health and social work activities

	Indonesia	Myanmar	Philippines	Vietnam
Share of Female Labour Force (%)	2.41	1.12	2.14	1.37
Share of Male Labour Force (%)	0.76	0.36	0.69	0.73
Number of Female Workers (thousands)	1214.33	109.88	363.23	368.10
Number of Male Workers (thousands)	593.63	52.39	186.63	213.88

While representing a small proportion of the workforce, there are thousands of women in health services (Table 2). Women are therefore potentially more exposed to infection, often with poor labour protections such as paid leave and job security. There are 'notable differences between the conditions in which women healthcare workers operate compared with men, including long-existing inequities in the gender pay gap, women's access to leadership and decision-making

roles, and barriers to full time employment' .(UN Women First 100 Days, 2020: 15). As reported in Myanmar, 'women health workers may be stigmatised and asked to leave their homes or temporary residences due to fear they will bring the virus home'(UN Women First 100 Days, 2020:16).

The Philippines is unique in having a significant export market of healthcare workers, and '[A]n estimated 85 per cent of employed Filipino nurses are working internationally and, given the travel restrictions that have been enforced over the course of the outbreak, may be disproportionately impacted by the unpredictable conditions in which they can work' (UN Women First 100 Days, 2020: 16).

Economic impacts in IW countries

Reports of the economic impact in each country vary, and the illustrations from Indonesia, Vietnam and Myanmar below reinforce both the impact on the retail and tourism sectors, and also minimal gender aware reporting.

Indonesia

Travel industry

The Indonesian Travel Agents Association (Astindo) ... recorded an almost 90 percent drop in sales due to cancellations as of March 12. The association noted that potential losses in February alone could reach Rp 4 trillion (US\$244.96 million) among its members.

Hotel industry

... the country's overall occupancy rate had fallen to 30 to 40 percent since the outbreak started in early January, below the regular low season average of 50 to 60 percent, with some hotels dropping as low as 20 percent after Indonesia announced its first cases on March 2.

Aviation industry

... **all airlines had cut their flights and routes by 50 percent** or more because of a drop in passengers.

Food and beverages industry

Major restaurant chains that employ thousands of workers in total have chosen to **temporarily shut down operations**. Among them are Ismaya Group, which has more than 20 restaurant brands with more than 60 outlets in the country, and the Boga Group, which runs more than 150 restaurants and employs more than 5,000 people.

Retail industry

The biggest decline in daily earnings was recorded in West Jakarta, which suffered a 32 percent fall in daily earnings per outlet.

The number of visitors to shopping malls has also decreased, prompting several malls to temporarily close their doors but still opening access to tenants serving basic needs, such as supermarkets and drug stores.

Source: '[COVID-19 Impacts across Indonesia's Business Sectors: A Recap](#)', *The Jakarta Post* (online, 30 March 2020)

Vietnam

The economy

'According to the World Bank, poverty rates could double (from 18% to 31%) among households in Vietnam linked to manufacturing reliant on imported inputs. Vietnam's economic growth rate in 2020 is expected to reduce by 1.5–2.7%. Vietnam is among the most vulnerable economies to global crises, due to its strong economic integration, tourism and 50% of the population working in agriculture and the informal sector'.

Source: UNICEF, Vietnam Country Office, Situation Report No 1, 2020

Manufacturing

'With the onset of COVID-19, Vietnamese businesses, especially those in the manufacturing sector, are experiencing a shutdown or work stoppages in production, due to the lack of raw materials from China'.

Source: Vietnam Briefing, 'Vietnam issues incentives to counter COVID-19 impact', 2020

Travel and services

'Travel and other restrictions imposed by the government to slow the spread of the virus led to lower domestic consumption.

Growth in services, the sector hardest hit by the pandemic, was halved to 3.2% in the first quarter of 2020, down from 6.5% in the corresponding period in 2019.'

Source: Asian Development Bank, 'Viet Nam's Economy to remain one of the fastest growing in Asia despite sharp slowdown due to COVID-19', 2020

Myanmar

Manufacturing

'In Myanmar, 20 of the country's 500 factories have halted operations due to interrupted supply chains, 15 of them permanently. The suspensions, mostly in the garment-making sector, have left 10,000 people out of work. Around 80 per cent of garment workers in Myanmar are women.'

Source: UN Women, 'Guidance for action: supporting SMEs to ensure the economic COVID-19 recovery is gender-responsive and inclusive', 2020

Philippines

The Philippine **business process outsourcing industry**, which employs many women, has been significantly affected. Difficulties in providing adequate social distancing and complaints of call centre workers sleeping on the floor and working under extreme stress have been reported. Representing approximately a tenth of the economy, 'the business process outsourcing sector could be decimated by the pandemic crisis and a subsequent wave of automation.'

Source: Cliff Venzon, '[Coronavirus a threat to vital Philippine call centres](#)', Nikkei Asian Review (online 13 April 2020)

Government responses

The timing of government reaction to the COVID-19 crisis varied among the IW countries, with Vietnam responding early and the Philippines later. Overall, policy responses of governments in all four countries are now extensive, including cutting interest rates, providing income support, tax exemptions, and micro loans, and in the Philippines, guidelines for flexible work arrangements and telework. Please view the full list of [policy responses by country](#).

These policies are rarely gender specific, suggesting government policy makers are largely not alert to the gendered impact of COVID-19 and the consequent recession. The Philippines responded initially by 'stopping healthcare workers from going abroad to manage pressures on the health system at home' (Diplomat Risk Intelligence, 'COVID-19 in Asia: a country-by-country guide', 14 April 2020). After public outcry, the ban was later lifted for workers with existing contracts overseas (*Straits Times*, 14 April 2020).

UN Women recognises Vietnam as exemplifying good practice for controlling the spread of the virus, but not necessarily the economic implications: 'The Plan for the Response of the Novel Coronavirus Pneumonia' promulgated on 31 January 2020 specifies the mobilisation of the entire political system, including the Viet Nam Women's Union, to intensively participate in epidemic management. Associations of women and youth will be engaged in establishing "anti-disease squads". It also notes the need to maintain continuity of necessary medical services, including for pregnant women.' (UN Women, *First 100 Days*, 2020: 27).

Women at work: risks and opportunities

Risk of history repeating and losing momentum on gender equality

History is set to repeat itself in the COVID-19 crisis unless gender specific interventions are undertaken. Like earlier health and economic crises, the current pandemic damages women's economic wellbeing and exacerbates existing gender inequalities, which will set gender equality back in the workplace. The recovery period is critical and a lack of gender sensitive planning by government and business is likely to worsen the socio-economic position of women in both formal and informal work contexts.

Risk of gender blindness and missing data

As government and businesses focus on immediate concerns of health, livelihoods and the economy, gender equality may take a 'backseat' in crisis management. However, gender-blind policies could have damaging consequences for workplace equality, including exacerbating the pay gap. For example, in the UK, the government has suspended companies' obligation to report their gender pay gaps, citing the coronavirus (Stone, 2020). This is not a policy that should be replicated in other countries, and indeed monitoring the gender pay gap after COVID-19 is a better strategy. Previous recessions have shown that diversity and inclusion strategies also fall in priority, and there is a risk this may occur after COVID-19.

Risk of return to male preferential treatment by employers

In a crisis context, there is a risk women may face a 'new normal', or a return to the 'old normal' of reduced employment opportunities as employers prioritise male employees in the allocation of work and in the rehiring and promotion process. Women may also face work conditions being degraded due to financial pressures, reflecting the prioritisation of economic efficiency over labour rights.

Risk of entrenching gender norms

Economic crisis can entrench gender stereotypes in business and society. Where crisis leads to a contraction in women's employment opportunities and austerity policies see social care devolved to the household there is a strong risk that norms defining women as primary carers and men as primary breadwinners become entrenched during the recovery period.

Longer term, there is a risk that extension of working from home (WFH) could become a new form of home-based work, exposed to becoming highly feminised and insecure (Delaney et al , 2018).

Risks for Women entrepreneurs

Women entrepreneurs are vulnerable to bankruptcy in the COVID-19 crisis. Due to their size and regulations, SMEs may be ineligible for government initiatives and support. Women entrepreneurs may also be perceived as less valid recipients.

Opportunity to improve women's economic and leadership positions

While there is a risk a 'tyranny of the urgent' may characterise business and government responses to COVID-19 there are also opportunities to improve women's position in the workplace (Davies and Bennett, 2016: 1044). If economic recovery strategies are gender responsive, there is an opportunity to 'build back better' with women and girls as a focus in crisis management and recovery (UN, 2020). If this path is taken, then employers may be encouraged to include women as participants and leaders in company recovery strategies. Women political leaders are being lauded during COVID-19 but there is less attention to women in business leadership positions. There is opportunity to reconceive leadership and include women more fully, acknowledging their contributions during and in a post-COVID-19 work environment. Lack of women in leadership leads to male-biased policy initiatives (Harman, 2016), with less attention to the gendered impacts of the crisis and the need for data disaggregated by sex.

Opportunity to revalue work and care

The COVID-19 crisis is an opportunity to revalue care work and social reproduction, both in the economy and at home. If gender-sensitive policies, including work from home arrangements, are carefully implemented, taking into account access to technology and appropriate space, this could improve pay and conditions for the female workforce. For example, companies forced to engage in flexible work could make this a regular offering for all employees, that is men and women. This, in turn, may improve policy settings and prompt funding of unpaid care in the home as a public good. Finally, men's exposure to the full domestic experience during lockdown could prompt a positive shift in the gendered division of labour. If men start to share the burden of the essential unpaid work of social reproduction, this could have positive normative and economic effects on women's economic participation. But this is unlikely to occur without government and business guidance and support.

Opportunity to consider transformative working arrangements and paid leave

The COVID-19 crisis has highlighted new working arrangements, principally working from home, and some new forms of leave, for example COVID leave. These changes may provide an opportunity for men and employers to observe the benefits of providing flexibility and leave. But it must also be recognised that not all work or workplaces can offer such arrangements, nor do all workers have the trust of employers, or access to the technology or space in their dwellings to make use of working from home arrangements. The opportunity presented by the COVID-19 experience is to ensure that transformative leave policies and working arrangements, those that

enable men to take on more domestic and care work, become embedded in company practice and government policy.

Opportunity to promote and extend decent work for all

The COVID-19 crisis highlights the deep inequalities and insecurities that shape global labour markets. Women in essential services are often located at the bottom of the global labour hierarchy, engaged in work that is low paid, precarious, dirty, dangerous and involves long hours of labour, much of it completed under highly exploitative conditions. Inadequate leave provisions and limited social protection measures expose workers to deep forms of vulnerability and economic insecurity. Unionisation rates are very low. A successful and inclusive COVID-19 recovery can only be built on a platform of decent work. This will include work opportunities that are productive and deliver a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organise and participate in the decisions that affect their lives, and equality of opportunity and treatment for all women and men (ILO, 1999).

Opportunity to reshape gender norms

Crisis responses such as working from home in many cases has been a success and could provide new options for flexible working for both men and women. This could allow employers to reorganise work in ways that accommodate non-paid care responsibilities and improve gender equality at work and in the home (Alon et al 2020). The working from home experience has exposed many men to the amount of work involved in caring for children and running the household. In some cases, this has seen households renegotiate the gender division of labour. A more gender equitable approach to work and care could become a new norm in the recovery period (Alon et al 2020).

Government policies for social care, for example childcare, would support a positive shift in gender norms and back women's ability to engage in economic activity at a level commensurate with their skill and education.

Opportunities for Women entrepreneurs

To counter these risks and generate opportunities for women entrepreneurs, it is necessary to provide direct economic support for SMEs, including credit and grants (UN Women Guidance for Action: Supporting SMEs 2020). This is particularly important for SMEs in vulnerable sectors, such as tourism and export-oriented manufacturing, which need to diversify as a result of the global shutdown. Promoting new sources of financial services and credit, and placing new productive assets in women's names, is critical to helping women entrepreneurs in crisis. For an inclusive recovery period, national economies must build new networks and mentoring opportunities for women entrepreneurs.

Opportunity to advance Sustainable Development Goals

To improve women's economic position post-COVID-19, recovery strategies should be informed by the Sustainable Development Goals. Targets 5 (gender equality), 8 (decent work and economic growth) and 10 (reduced inequality) create a foundation of inclusive growth. In a report on the socio-economic impact of COVID-19, the UN Secretary General stressed that the world now faces critical choices in its recovery process. Businesses must decide how they will pursue economic recovery – to disregard the evidence on the socio-economic benefits of gender equality at work or not. Likewise, the ILO (ILO Monitor Second Edition, 2020) advocates for four pillars of COVID-19 recovery emphasising the importance of labour standards and avoiding lowering them: Pillar 1 Stimulating the economy and employment, Pillar 2 Supporting enterprises, jobs and incomes, Pillar 3 Protecting workers in the workplace, Pillar 4 Relying on social dialogue

Areas for further research

The rapid review of the existing literature and the analysis highlights areas requiring further research and monitoring.

- The impact of COVID-19 on women's employment in the formal sector is clear, but the *interaction between the formal and informal economy* has not been examined in detail. Research is needed to assess if growth in the informal sector occurs as women potentially lose jobs in the formal sector.
- This report does not focus on *informal employment, micro-entrepreneurs or migrant workers*. Research is needed on these areas of work as they are all significant and highly gendered issues in IW project countries and issues closely related to formal employment participation.
- *Women entrepreneurs* and supply chain disruption responses. Will COVID-19 mean that women entrepreneurs lose business or pivot into new areas? How flexible and adaptable are they and what support is needed?
- Much can be gained from *identifying and communicating good business responses*. Will the value of diversity and gender sensitive policies be diminished or will they be improved? What is happening in IW partner organisations?
- *Gender division of labour in the home*. Has the introduction of working from home for men (in some areas) provided an opportunity for norms to be re-set, and will businesses respond with increased willingness to allow working from home in the future. Would that be desired by women and men?
- *Gender disaggregated data* is widely acknowledged as being needed, but exactly what data is needed in each country and how can comparability be ensured?

Conclusion

The risks and opportunities for gender equality at work in IW countries will be shaped in three spheres of economic activity: the demand for women's labour by business; household decisions about the supply of women's labour; and, government and business policy settings for gender inclusive growth (Rubery and Rafferty 2013). The IMF's projection is that annual global growth will rebound to 5.8% after COVID-19 (Gopinath, 2020). The question is, will women benefit?

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