

Global Value Chains, Economic Upgrading, and Gender

Case Studies of the Horticulture, Tourism, and Call Center Industries

Edited by Cornelia Staritz and José Guilherme Reis

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Preface

It is well established that trade and trade-related policies have gender-differentiated effects. Equally important, gender-specific constraints affect trade competitiveness. Recent studies, for example, suggest that gender inequality shapes comparative advantage (Do et al. 2011) and that reducing gender discrimination can have an effect on productivity; see, for example, World Bank (2012) and the ILO/IFC Better Work Programme.¹ What is still less clear is how to identify and integrate gender dimensions into trade-related projects.

At the World Bank, and among Bank clients, donors, and other stakeholders, there has been growing interest in the relationship between trade and gender. Therefore, the International Trade Department and the Gender Department of the World Bank have initiated a trade and gender agenda. The development of this agenda takes place in the context of the implementation of a new Bank Group trade strategy where gender is an integral, cross-cutting issue. The main objectives of this agenda are twofold: (i) to provide task managers of trade-related projects with guidance that can help them identify and assess the gender dimensions of their activities, and (ii) to develop policy relevant knowledge products in areas where knowledge gaps exist.

Understanding the gender dimensions of economic upgrading processes in different sectors and what this implies for policy interventions is crucial, given the focus of trade-related World Bank projects on upgrading.

This book provides a gendered analysis of the horticulture, tourism, and call center global value chains (GVCs). It is based on case studies carried out in Honduras, Kenya, and the Arab Republic of Egypt. We focus on export sectors that have been characterized by high female employment and that have been relatively under-explored from the angle of trade and gender research. The case studies show that GVCs and economic upgrading dynamics have important gender dimensions and that integration and economic upgrading both influence and are influenced by gender relations.

I am confident this book will be a valuable resource for policy makers, experts, and academics engaged in policy analysis related to trade and gender.

Otaviano Canuto
Vice President, Poverty Reduction and
Economic Management

¹ <http://betterwork.com/global/>.



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Abbreviations

ACTUAR	Costa Rican Association of Rural Community Tourism	ISO	International Organization for Standardization
AGOA	African Growth and Opportunity Act	IT	Information Technology
AgriSETA	Agricultural Sector Education Training Authority	ITC	International Trade Center
ATEP	Agribusiness and Trade Expansion Program	ITES	Information Technology Enabled Services
ATPDEA	Andean Trade Promotion and Drug Eradication Act	ITIDA	Information Technology Industry Development Agency
ATV	All-Terrain Vehicle	ITO	Information Technology Outsourcing
BBBEE	Broad-Based Black Economic Empowerment Act, 2003	K.Sh.	Kenya Shilling
BICS	Brazil, India, China, South Africa	KATO	Kenya Association of Tour Operators
BPAP	Business Processing Association of the Philippines	KenInvest	Kenya Investment Authority
BPO	Business Process Outsourcing	KHDP	Kenya Horticulture Development Program
CBI/CBTPA	Caribbean Basin Initiative/Caribbean Basin Trade Partnership	KPI	Key Performance Indicators
CGGC	Center for Globalization, Governance and Competitiveness	KPO	Knowledge Process Outsourcing
COPC	Customer Operations Performance Center	KPSGA	Kenya Professional Safari Guides Association
CREST	Center for Responsible Travel	KTDC	Kenya Tourism Development Corporation
CRM	Customer Relationship Management	KUDHEIHA	Kenya Union of Domestic, Hotel, Educational Institutions, Hospitals, and Allied Workers
CSR	Corporate Social Responsibility	KWFT	Kenya Women Finance Trust
DFID	UK Department for International Development	KWS	Kenya Wildlife Services
DNLP	Draft National Land Policy	LDC	Least Developed Country
ECPAT	End Child Prostitution Child Pornography and Trafficking of Child for Sexual Purposes	MCIT	Ministry of Communications and Information Technology
ETI	Ethical Trade Initiative	MOT	Kenya Ministry of Tourism
FAO	Food and Agriculture Organization	MTDP	Mekong Tourism Development Project
FDI	Foreign Direct investment	NEMA	National Environment Management Authority
FTTSA	Fair Trade Tourism South Africa	NGO	Nongovernmental Organization
FUNDER	Fundación para el Desarrollo Empresarial Rural	NQF	National Qualifications Framework
GATS	General Agreement on Trade in Services	NTA	Lao National Tourism Administration
GDP	Gross Domestic Product	ODI	Overseas Development Institute
GDS	Global Distribution System	OECD	Organization for Economic Cooperation and Development
GIZ	German International Cooperation Agency	PAFTA	Pan Arab Free Trade Area
GSP	Generalized System of Preferences	PCI DSS	Payment Card Industry Data Security Standard
GVC	Global Value Chains	R&D	Research and Development
HACCP	Hazard Analysis & Critical Control Points	ROI	Return on Investment
HR	Human Resources	SEWA	Self Employed Women's Association
ICT	Information and Communication Technology	SHG	Self Help Group
IFC	International Finance Corporation	SNV	Netherlands Development Organization
ILO	International Labour Organization	SQF	Safety Quality Food
		Telecom	Telecommunication
		TOI	The Tour Operators' Initiative for Sustainable Tourism Development

TSA	Tourism Satellite Account	UNWTO	The United Nations World Tourism Organization
UCOTA	Uganda Community Tourism Association	USAID	United States Agency for International Development
UNCTAD	United Nations Conference on Trade and Development	USDA	United States Department of Agriculture
UNEP	United Nations Environment Programme	VMO	Vendor Management Organizations
UNESCO	United Nations Educational, Scientific, and Cultural Organization	WITEP	Women in Tourism Empowerment Programme
		WTTC	World Travel and Tourism Council



Executive Summary

This book provides a gendered analysis of the horticulture, tourism, and call center global value chains (GVCs). It is based on a survey of the literature and case studies carried out in Honduras, Kenya, and the Arab Republic of Egypt. The studies focus on export sectors that have had high female employment and have been relatively underexplored from the angle of trade and gender research.

The studies show that GVCs and their upgrading dynamics have important gender dimensions, and that integration and upgrading are influenced by, and have an impact on, gender relations. The three GVCs are discussed in detail in the following chapters. Although different dynamics clearly exist in all three sectors, we can draw some general conclusions.

First, patterns of job segregation are observed in all three case studies. In the horticulture industry, Bamber and Fernandez-Stark (chapter 2) show that although women participate in all stages of the value chain, they are concentrated in the packing segment, where they generally work as waged labor, and in the production segment, where they typically work as unpaid family labor in small-holder operations. In both segments, women are preferred because of their perceived dexterity and attention to detail. In the horticulture value chain, few women participate as entrepreneurs independently cultivating crops, and there is a gender bias with respect to certain crop types.

In the tourism industry, Christian (chapter 3) finds that developing-country destinations vary in the number of women involved, but overall, they are overrepresented in the accommodation and excursion segments. Within these segments, they work mostly as low- to mid-skill employees in hotels (for example, housekeeping, laundry, food and beverage, and clerical work), as own-account workers or entrepreneurs, as artisan or retail vendors, and in family restaurants.

In the call center industry, Ahmed (Chapter 4) shows women are concentrated at the agent level, while employment in higher-value segments and management (except for human resources) typically are male dominated. Few female entrepreneurs run their own call centers.

Second, women face the gender-intensified constraints discussed in the literature on inequalities of eco-

nomic opportunities, but their extent and articulation may be quite different, depending on the value chain. The study of the horticulture industry suggests that female waged laborers face discrimination in compensation, work conditions, access to training, and sexual harassment. Efforts of female entrepreneurs to enter value chains and upgrade into higher-value activities appear to be complicated by limited access to key inputs, such as land, finance, and market information.

In the tourism industry, gender-intensified constraints appear to be related to practices of global lead firms, such as pricing, the standards required, gendered job constructions, types of products sold, and international access channels. These practices seem to create constraints that shape the gender composition of tourism workers and entrepreneurs and the ability of women to benefit equally from economic upgrading.

The analysis of the call center industry shows that the most important gender-specific constraints impeding long-term female engagement and skill and career development are as follows: long, inflexible shifts; stigma associated with female night work; lack of gender-sensitive transport and social benefits, such as maternity leave and childcare facilities; a strong gender bias in role assignment; and lack of access to training, promotion, and networks.

Third, constraints related to women's primary responsibility for reproductive work have been identified as important in all three studies. This social division of labor is deeply embedded in developed and developing countries, but poor infrastructure, particularly in rural areas, heightens this challenge for women in developing countries. These responsibilities stem from the extended family, not just the immediate family in many developing countries. They often constrain the full engagement of women and the opportunities they have in the paid economy.

Based on these three studies, interventions should focus on the following areas:

- **Increase access to training:** In all three industries, women have limited access to the education, skills development, and training required to participate in production processes, particularly in higher-value segments, and business operations within GVCs. Ac-

cess to training may not overtly discriminate against women but it may be difficult for women to participate. This is because they are not part of business networks, and training often takes place in the evening after work, or on weekends when women are responsible for unpaid household work. Hence, training programs need to be scheduled and organized so women can attend, and should take into account cultural and social norms that prevent women from interacting with men. In addition, to avoid gender bias in role assignment and to ensure that “feminized skills” are rewarded fairly, certification programs that recognize all skills required for particular industries are crucial—regardless of whether these skills were learned through formal education, training, or life experience.

- **Improve access to information and networks:** Business networks in all the three studies are dominated by men; similarly, females are underrepresented in trade unions. Policies that support women’s groups and associations are crucial. Strong associations provide female workers and producers/entrepreneurs with a voice in policy making and increase their bargaining power.
- **Increase access to finance:** In particular for female producers/entrepreneurs to initiate upgrading processes and fulfill the requirements of global lead firms, access to finance is crucial. The horticulture and tourism studies, in particular, stress the need to address gender-intensified constraints to credit by raising awareness among financial institutions, developing innovative financial instruments, and improving financial literacy.
- **Address the gender division of reproductive work:** This is a long-term challenge. But the constraint can be eased by policies that reduce the burden of women’s reproductive responsibilities and free women to participate in productive activities. Such policies should address inadequate infrastructure, such as access to water, electricity, transport, and other basic household requirements, as well as regulations and services that facilitate combining paid and unpaid work, such as childcare, health care provisions, maternity and paternity leave, and transport from and to work.
- **Engage lead firms in reducing gender discrimination:** Given the power of lead firms in GVCs, they can play a key role in driving change by developing gender-sensitive employment, training, and sourcing policies. Furthermore, they can encourage and support their suppliers in implementing similar practices and enforce this through third-party monitoring of their supplier networks.

Focusing on these areas will ensure that upgrading strategies do not exacerbate existing inequalities. The horticulture study, for example, indicates that upgrading in the packing segment favors female employment, while upgrading into the processing segment favors males. Concerning female entrepreneurs, who are concentrated in smaller firms and have limited access to resources, networks, and buyers, the study suggests that they tend to be less able to upgrade to comply with buyers’ standards, so they often are excluded from higher value-added export possibilities. Thus, these constraints not only limit women but hinder upgrading the horticulture industry overall.

The tourism study shows that female entrepreneurs in the tour operator segment are less likely to upgrade, because they frequently have limited access to international markets, finance, education, and experience to meet international standards. Due to gender norms, women generally cannot upgrade to the male-dominated driver and guide segments, a popular first stage in the upgrading trajectory. Furthermore, the study indicates that when a tour operator vertically upgrades and opens safari camps, women often are unable to fill the new jobs due to the distance to camps, the on-site living arrangements, and the gender beliefs in tribal communities where camps are located. In the hotel segment, the use of flexible, often female, labor can support hotels’ cost competitiveness, but such practices also can be a constraint to product and process upgrading. Female artisan or vendor entrepreneurs may find it difficult to supply larger and more luxurious hotels due to their higher standards and women’s limited access to networks.

The call center study shows that while frontline work is feminized, supervisory and management positions are often available only to men, and as the industry upgrades into more complex services, the workforce becomes male dominated. For example, upgrading into international markets can require increased nightshift work, which is often socially constrained for women. Product upgrading into areas that require higher technical skills also can limit female advancement due to their curtailed access to education, training, promotion, and networks. Gender-intensified constraints can restrict a country’s ability to remain competitive and upgrade to higher-value segments of the chain.

To sum up, policy makers and donors need to assess the gender dynamics of GVCs, economic upgrading processes, and related interventions. Such an assessment involves understanding which positions and roles men and women have in export sectors and GVCs and their re-

wards, constraints, and opportunities. To understand this, collecting sex-disaggregated data about employment, activities, and rewards, and approaching women's groups, female producers, and women workers' associations and

networks will be relevant. Integrating gender into trade and sectoral policy formulation is key to making policies more effective and to reaching broader development objectives that include gender equality.

Global Value Chains, Economic Upgrading, and Gender

Cornelia Staritz

Context and Motivation for the Book

The motivation behind this book is twofold. First, the global economy is increasingly structured around global value chains (GVCs) that account for a rising share of international trade, global gross domestic product (GDP), and employment. As a result, many developing countries' industrial and economic development agendas look at upgrading strategies (understood as moving from lower- to higher-value activities in a value chain) as a way to access and extend the benefits (for example, security, profits, and improved skills and capabilities) from participation in GVCs (Bair and Gereffi 2003).

Second, integration into GVCs and upgrading strategies affect men and women differently. As with the whole economy, GVCs are gendered structures; women and men typically work in different sectors and jobs, have different access to resources and basic services, and play different roles in households, communities, and the economy—often for reasons that have nothing to do with their capacities and economic potential but with social norms. In many countries, women have a central role in export-oriented sectors, in particular, as workers in labor-intensive industries and as small, often informal, producers. However, gender inequalities may limit women to specific sectors and job types, with implications for the functioning of, and the upgrading prospects within, value chains.

In this context, the book aims to provide evidence to help assess the gender dimensions of integration and economic upgrading processes in GVCs. A gender-differentiated analysis is imperative because it highlights the impact of GVC integration and upgrading on female and male workers, producers, and entrepreneurs, and on broader socioeconomic effects. The focus on gender is also crucial because it allows researchers and policy makers to understand the functioning of GVCs and the effects of gender-specific constraints and opportunities on

competitiveness and upgrading (Barrientos 2001; Fontana 2011). The integration of gender dimensions is therefore crucial to make trade and export promotion interventions and policies more effective.

The Importance of Global Value Chains and Economic Upgrading

Over the past three decades, the global economy has undergone profound changes that have led to growing integration and have affected the organization of global production and international trade. These changes have a quantitative dimension, as reflected by the considerable rise since the 1980s in trade (as a share of output) and in foreign direct investment (FDI). The qualitative change in the structure of international trade and global production is even more significant (Milberg 2004). Government policy has shifted from import substitution to trade liberalization and export-oriented development, and corporate strategies of transnational firms have focused on core competencies and vertical disintegration. These, along with changes in communications, transportation, and technology, have led to a significant change in the industrial organization of a variety of sectors. The contemporary economy is increasingly structured around GVCs where transnational corporations break the production process into parts and locate them around the world. Such global production arrangements can be found in sectors as diverse as commodities, horticulture, apparel, electronics, tourism, and business services outsourcing.

The evolution of GVCs has had significant implications for global trade, production, and employment and on how developing-country firms, producers, and workers are integrated into the global economy. GVCs link firms, workers, and consumers around the world and often provide a stepping stone for firms and workers in developing countries to integrate into the global economy. For many

countries, especially low-income countries, the ability to effectively insert themselves into GVCs is imperative for their development (Barrientos et al. 2010). This supposes an ability to access GVCs, to compete successfully, and to capture the gains in terms of economic development, capability building, and poverty reduction (Kaplinsky and Morris 2001).

Participation in GVCs increasingly involves fulfilling high requirements with regard to quality, lead times, flexibility, and compliance with process, product, and social standards. To take advantage of the opportunities and to cope with the challenges, firms and countries must improve their competitiveness and initiate upgrading processes. Generally, upgrading refers to moving from lower- to higher-value activities to increase the benefits from participating in global trade and production (for example, security, profits, and improved skills and capabilities) (Bair and Gereffi 2003). In this book, we disentangle upgrading strategies following the influential fourfold upgrading classification of Humphrey and Schmitz (2002): (i) functional upgrading, where improvement in the position of firms results from increasing the range of functions performed or changing the mix of activities towards higher-value tasks; (ii) process upgrading, where efficiency gains arise from reorganizing the production system or introducing new technologies; (iii) product upgrading, where firms move into more sophisticated product lines; and (iv) chain upgrading, where firms develop capabilities in one chain and then use them in another, more technologically advanced chain.

Upgrading processes are shaped by the type of value chain in which developing-country firms operate, particularly by chains' governance structure. Governance structures determine power relationships among actors in the chain, firms' prospects of engaging and upgrading in chains, and how benefits of participation are distributed along the chain (Gereffi 1999; Gereffi et al. 2001; Kaplinsky and Morris 2001). Governance structures are crucially influenced by lead firms—that is, the firms that coordinate and govern GVCs, establishing product specifications, technical standards, and broad cost and performance structures, according to which global industries operate. Lead firm governance strategies can both enable and constrain upgrading prospects of supplier firms (Kaplinsky and Morris 2001).

The GVC literature identifies well-established governance structures, such as producer-driven and buyer-driven chains (Gereffi 1994).² In producer-driven chains—common for capital- and technology-intensive products, such as automobiles, electronics, and machinery—large, integrated (often multinational) firms coordi-

nate production networks. Power is generally embedded in the lead firm's control over production technology. In contrast, buyer-driven value chains are characterized by decentralized, globally dispersed production networks, coordinated by lead firms. Lead firms control activities that add value to apparel products (for example, design and branding) but often outsource all or most of the manufacturing process to a global network of suppliers (Gereffi 1999). Buyer-driven chains are common in labor-intensive, consumer-goods industries, such as apparel, footwear, toys, and consumer electronics, and in some agricultural commodity sectors, such as horticulture.

Upgrading processes, governance structures, and the distribution of benefits along GVCs are contested. This is particularly true now, given the heightened global competition because an increasing number of developing countries, including large ones such as China and India, have shifted to export-oriented development. In recent years, upgrading patterns and governance structures have become more complex. This can be seen in the diffusion of knowledge-intensive activities, including R&D and innovation, particularly in Asia. In several sectors, such as automotive, electronics, and apparel, large first-tier suppliers that have emerged in developing countries manage complex global production and sourcing networks and play influential roles in logistics, financing, design, and product development (Appelbaum 2008). These suppliers have developed a global footprint and have challenged, at least to a certain extent, the power of traditional lead firms. Lead firms that sell both domestically and, increasingly, in regional and global markets have also emerged in developing countries. The growing importance of developing-country markets, including domestic, regional, and large emerging countries' markets, has supported this trend (Cattaneo et al. 2010; Staritz et al. 2011). However, there are important asymmetries among and within developing countries in firm's and government's capacity to realize these upgrading possibilities.

The GVC literature on upgrading has largely focused on economic upgrading and has not specifically taken into account social upgrading, which is understood as improved working conditions and the creation of higher-skilled, better-paid jobs. Economic and social dimensions of upgrading are often intertwined, but one does

² It also identifies a more detailed, fivefold typology of GVC governance that includes markets, hierarchies (vertically integrated firms), and several types of production networks (captive, relational, and modular) (Gereffi et al. 2001).

not necessarily lead to the other (Barrientos et al. 2010). Economic upgrading can have different impacts on different groups of firms as well as workers and producers defined according to income, skills, formality, or gender. Understanding these potentially varying impacts on firms, workers, and producers is crucial to assessing the overall development impacts of upgrading processes and interventions.³

Global Value Chains as Gendered Structures

As with the whole economy, GVCs are gendered structures because of the differences between the positions and roles of women and men in households, communities, labor markets, and the global economy (Van Staveren et al. 2007). Men and women are concentrated in different sectors and occupations, and are employed in different stages of value chains. Although there are variations between countries, women tend to be concentrated in fewer sectors than men, who are more evenly distributed across a larger range of sectors, occupations, and productive activities (Fontana 2011). These differences are due essentially to three reasons: (i) gender differences in time use, mainly resulting from women's primary responsibility for reproductive work; (ii) gender differences in access to productive inputs and resources, particularly land, credit, training, and networks; and (iii) gender differences stemming from market and institutional failures and discrimination.

Viewing the economy through a gender lens involves assessing both market-oriented productive and reproductive activities. Women bear primary responsibility for reproductive and unpaid work, including domestic work, childcare, and caring for the sick and elderly, which structures and often constrains their participation in the paid economy. Women face greater disadvantages than men in responding to new economic incentives because they are more time-constrained but also because of gender differences in the ability to access resources, such as land, credit, networks, education and skills, and infrastructure, utilities and services (for example, health, transport, water, and electricity) in most countries. While both men and women in developing countries experience constraints in accessing these resources, gender inequalities exacerbate constraints for women, leading to "gender-intensified constraints" (Fontana 2011).

Clearly, women are not a homogenous group. Gender is a crucial socioeconomic identity, and gender roles and norms are prevalent in households, communities,

and the economy. They are, however, intertwined with other socioeconomic identities, such as age, status, income class, education and skill levels, nationality, ethnicity, and race. Therefore, women as a group share similar constraints, but their extent, articulation, and consequences may be quite different for different groups of women. For example, women who are also part of marginalized tribes face additional constraints, whereas women from high-status groups are better positioned to mitigate gender-intensified constraints. Also, women in different positions, most importantly formal and informal workers, managers, producers, and entrepreneurs, face different types of constraints. The international trade and gender literature tends to focus on women as entrepreneurs, particularly on women who own small and micro businesses. However, in most countries and sectors, female entrepreneurs account for only a small share of total female employment. Most women work as formal or informal waged labor or unpaid family labor (Fontana 2011). Hence, despite general gender inequalities, different groups of women, depending on their socioeconomic background and their positions in trade and GVCs, face different types of gender-intensified constraints.

Trade liberalization⁴ and the expansion of trade and GVCs impact men and women differently because of these gender inequalities. Males and females may be in unequal positions to take advantage of opportunities offered by international trade and GVCs. Additionally, occupational segregation can reinforce gender inequalities and differentiated access to inputs, making it difficult for women to improve the productivity of their activities and exposing them to a productivity trap (World Bank 2012). Only appropriate intervention will allow women to break out of this trap and take advantage of integration into GVCs.

Gender inequality also impacts trade relations and outcomes because gender inequalities influence resource allocation and competitive advantage (Fontana 2009). Gender inequality may be a source of export competitiveness, because the segregation of jobs by gender tends to keep women's wages artificially low. This may stimulate export growth in sectors that compete based on low costs

³ For more background on the relationships between economic and social upgrading, see the Capturing the Gains Research Network website, <http://www.capturingthegains.org/>.

⁴ The focus of this book is on the gendered impacts of trade expansion in the form of integration and upgrading into GVCs and not on trade liberalization. For an analysis of the gendered implications of trade liberalization and associated adjustment costs, see, for example, Joeke (1999b) and Fontana (2009).

(Seguino 1997, 2000; Standing 1999).⁵ In this context, GVCs take advantage of existing gender relations by using female labor to produce low-cost (but often high-quality) products for export (Barrientos 2001). Gender inequality may also limit the gains from integration into GVCs, for example, through its negative impact on skill development and innovation and by undermining supply responses in agriculture (Elson 2007; Fontana 2011; Simavi et al. 2009).⁶ The World Bank's *World Development Report 2012*, for example, shows that equalizing the access of men and women to fertilizer and other agricultural inputs increased yields in maize production by 11–16 percent in Malawi and 17 percent in Ghana (World Bank 2012: 237). The *World Development Report 2012* concludes that gender inequality is costly in an increasingly integrated world.

The complex relationship between gender inequality and export expansion and competitiveness can be seen in the share of female relative to male employment in different export sectors and GVCs. Over the past three decades, the evolution of GVCs in labor-intensive sectors, including manufacturing, certain types of services, and nontraditional agriculture, has created increased, export-based employment opportunities for women. In manufacturing, the rapid growth of export capacity in many developing countries has been associated with an increase in the demand for female labor, evident in the high rate of female employment in export-oriented industries, such as apparel, footwear, toy production, food processing, and electronics assembly (Tejani 2010). In the services sector, in particular in business services outsourcing, trade expansion has heralded similarly gendered employment effects, although with a bias toward higher skills (Fontana 2009).

In agriculture, the impact of trade and GVC expansion on female employment has been diverse (Joeques 1999b). Women's weaker property rights to land, limited access to resources, and conflicts between using land for subsistence versus exports have curtailed their ability to respond to export demand, and, therefore, to reap the potential gains from trade. Women's limited access to resources constrains their activities as entrepreneurs and results in women entrepreneurs being concentrated in small firms and informal activities (ODI 2009a). However, the increase of nontraditional agriculture such as horticultural (that is, fruits, vegetables, and flowers), particularly in Sub-Saharan Africa and Latin America, has resulted in the emergence of "modern" agricultural waged labor where women are overwhelmingly the preferred source of labor.

Although trade has increased employment opportunities for women in export-oriented sectors and GVCs, women are often concentrated in specific sectors and job types. Demand for low-cost, flexible labor in export-oriented industries has often led to relatively low wages and

poor working conditions in these "female jobs." However, although working conditions appear to be poor, they are generally better than in other employment opportunities and in previous jobs, and often constitute the first and only opportunity for women to access formal employment and earn cash income.

Recent studies conclude that although women have played a central role in labor-intensive manufactured exports, when upgrading occurs towards more skill-, capital-, and technology-intensive products, the gender profile tends to shift towards men (Joeques 1999b; Mehra and Gammage 1999; Mitra-Kahn and Mitra-Kahn 2009; Tejani and Milberg 2010).⁷ This shows that gender inequality can be positively correlated with export competitiveness

⁵ Seguino (1997, 2000) found that the gender wage gap was an important basis for the heavy reliance on female labor in East Asia's export expansion and economic growth in the 1990s. Standing (1999) also finds that the feminization of employment in export sectors is related to the fact that women provide a cheaper and more flexible source of labor than men. Randriamaro (2005) states that women's disadvantaged position in labor markets in developing countries paradoxically rebounds to their advantage under the competitive conditions in export markets, at least in those countries, which have a competitive advantage in labor-intensive export products. Busse and Spielmann (2006) find that gender inequalities in wages can improve a country's competitive advantage in labor-intensive products.

⁶ This has a sector dimension. Gender inequality may serve as a source of export competitiveness in labor-intensive manufacturing sectors, sectors such as horticulture, or in specific services that have similar attributes and require low-cost and flexible labor. For traditional agriculture sectors, higher value-added and skill- and technology-intensive manufacturing and service sectors, and for female entrepreneurs in all sectors, gender inequality may be the basis of weak supply responses and serve as a constraint to export competitiveness (Seguino 2000).

⁷ Mehra and Gammage (1999: 540) note that "(i)n some middle-income and developed countries, the demand for women's labor appears to be declining as export production is restructured to use more technology. More specialized skills are required and this often translates into an increase in the demand for male labor and a reduced demand for female labor." Joeques (1999b) shows a reduction of women's employment shares in special economic zones (SEZs) in some rapidly developing countries, notably in Mexico and Singapore but also in Malaysia, Mauritius, and the Republic of Korea. She states that as the composite output of SEZs changes towards more technologically sophisticated goods, such as automobiles, the share of women workers tends to fall. Mitra-Kahn and Mitra-Kahn (2009) report that the relationship between gender wage inequality and growth for 20 developing countries is nonlinear: low-skill export manufacturing is positively related to wage inequality whereas high-skill manufacturing is not. Tejani and Milberg (2010) find that upgrading—indicated by capital intensity and value added per worker—is negatively related to the growth of female intensity in manufacturing employment in Southeast Asian and Latin American countries.

in low-skill, labor-intensive exports but can also develop into a constraint to competitiveness and upgrading in more complex and higher value-added manufacturing exports. Studies of the relationship between upgrading and the share of female employment in the horticulture sector, tend however to come to a different conclusion. Upgrading in the horticulture sector often creates job opportunities in activities (for example, preparation and packaging) where female employment is most concentrated and tends to extend opportunities for female workers (Barrientos et al. 2003). This points to sector- and GVC-specific differences in the relationship between gender dynamics and economic upgrading.

Gendered Global Value Chain Analysis

GVC analysis is increasingly used to identify constraints and opportunities in global markets and to develop interventions and policies to encourage export expansion and competitiveness. GVC analysis explores how the production, distribution, and consumption of products are globally interconnected along value chains and how firms can enter and improve their positions within these chains (Gereffi 1999; Gereffi et al. 2001; Kaplinsky and Morris 2001). By focusing on the sequences of tangible and intangible value-adding activities, from conception through production to end use, GVC analysis provides a holistic view of global industries. GVCs can be analyzed from the top down (for example, examining how lead firms govern their global-scale affiliate and supplier networks) and from the bottom up (for example, asking how business decisions affect the trajectory of economic and social upgrading or downgrading) with implications for both firms and countries.⁸

GVC analysis generally covers four main dimensions (Gereffi 1994): (i) the input-output structure, which identifies key economic activities and value-adding stages; (ii) territorial configuration, which maps the geographic scope and different geographic scales (local, national, regional, and global) at which GVCs operate; (iii) governance structures, which highlight the power relations within GVCs, particularly the role played by lead firms; and (iv) the institutional context, which assesses how local, national and international regulations, policies, and contexts shape GVCs.

Women and men are involved at different GVC stages as workers, producers, entrepreneurs, and consumers. Gender relations underlying this involvement importantly influence the workings of GVCs and upgrading processes. Conversely, GVCs and upgrading processes influence the gender division of labor in the locations where they are operating (Barrientos 2001). Upgrading processes lead to

changes in employment and skill patterns, while gender-intensified constraints can mute upgrading responses. Gender discrimination may undermine workers' productivity and managerial efficiency; women's limited access to skills and credit may undermine quality improvements and investments. A gendered GVC approach is, therefore, central to understanding the functioning of GVCs and the roles and positions men and women have; their different access to, and control over, resources; and the constraints and opportunities they face in entering and upgrading within GVCs.

A gendered GVC analysis involves seeing the economy and GVCs as gendered structures and understanding the gender composition of employment; gendered access to, and exclusion from, particular activities; and gender-intensified constraints and opportunities. Hence, it requires identifying the following: (i) in which sectors, occupations, and stages of the GVC women work, and on what employment terms and for what rewards relative to men; (ii) gender-based constraints that reduce the benefits to women from GVC integration and upgrading and that may mute supply responses, export performance, and upgrading prospects for the whole economy; and (iii) policy interventions to remove gender-based constraints so men and women benefit equally from GVC integration and upgrading.

A gendered GVC analysis makes also visible work that tends to be overlooked in policy interventions: reproductive work, which is the primary responsibility of women and strongly impacts their paid work possibilities. Further, a gendered GVC analysis has to include global and local institutional and social contexts and their interactions with the commercial dynamics of GVCs (Barrientos 2001; ITC 2007). GVCs are embedded within social and gender norms that reflect socially constructed gender divisions of labor and differential access to resources. These social norms are influenced at different levels and by different actors inside and outside the value chain, including practices and standards of global lead and local firms, global and local institutions, and policies at the global and local level.

Although the GVC framework can be extended to include a gender dimension, systematic gendered GVC analyses have been limited.⁹ Many GVC studies in sectors with high female involvement, such as apparel, food, horticulture, and certain services, make pro-gender claims

⁸ For more background on the GVC framework, see the Global Value Chains website, <http://www.globalvaluechains.org/>.

⁹ Exceptions include, for example, Barrientos (2001), Barrientos et al. (2003), and Fontana (2011). There are also civil society-related case studies that assess the role and working conditions of women as a basis for campaigns to link global buyers to labor rights issues in their supply chains: see, for example, ILO (2007) McCormick and Schmitz (2001), and Oxfam (2004).

based on the large female employment share. However, deeper analysis of the contributions, roles, benefits, and constraints of male and female participation is often missing. Hence, research systematically assessing the gender dimensions of integration into GVCs and economic upgrading is limited.

Objectives and Methodology of the Sectoral Case Studies

The objectives of this book are to provide evidence to help assess the gender dimensions of integration and economic upgrading processes in GVCs, and to provide policy makers with recommendations to encourage export competitiveness and economic upgrading, as well as gender equality. These issues are addressed in three sectoral case studies that analyze the gender dynamics and implications of economic upgrading, taking into account the gender distribution of employment and gender-intensified constraints and opportunities in the respective value chains.

The sector selection focused on export industries that have high female employment and have been underresearched from a trade and gender angle, namely horticulture, tourism, and call centers. International trade of horticulture products has grown tremendously since the 1980s. The sector is important in developing countries from an employment and upgrading perspective, because the cultivation of fruits and vegetables is substantially more labor intensive than cereal crops and offers more post-harvest opportunities to add value. In particular, a large number of women have entered the industry to work in both production and post-harvest jobs, leading authors to hail this as the “feminization of agriculture.”

Developing countries have increasingly promoted tourism industries to gain export earnings, increase employment, and develop rural regions. Tourism is thought of as “pro-poor” because of the presumed weak barriers to entry facing poor people and communities and its ability to harness natural and cultural assets in poor regions, and “pro-women” due to the perceived low-skill nature of the sector.

Call centers are a young and growing industry that has captured the attention of developing countries seeking to create employment and participate in the new knowledge economy. The industry is particularly attractive as it offers higher wage and formal employment to previously marginalized groups, in particular, skilled women.

The book’s sectoral case studies analyze the industry at a global level, providing examples from a range of de-

veloping countries. In addition, one country case in each sector gives concrete examples of gendered value chain and upgrading dynamics. Case study countries were selected based on the following criteria: (i) the importance of the respective industry in the economy, (ii) the existence of successful upgrading processes, and (iii) the relevance of the experience for other developing countries. The countries selected were Honduras for horticulture, Kenya for tourism, and the Arab Republic of Egypt for call centers. Case study findings are integrated with findings from other countries to provide a basis for broader conclusions and policy recommendations.

The following questions are covered in the gendered analysis of GVCs and economic upgrading in the three sectoral studies:

- **Gender composition of GVCs:** In which sectors and occupations do women and men work in the GVC? Which roles (that is, formal and informal workers, managers, producers, and entrepreneurs) and positions do women and men have at each GVC stage? How pervasive is gendered job segregation? What rewards and quality of work (for example, wages, working conditions, employment status, and social protection) do women and men receive in the GVC?
- **Gender-intensified constraints in GVCs:** What are the GVC’s gender-intensified constraints (for example, unpaid work burden, gendered job segregation, upward mobility, access to skills, training, and resources such as land, credit, and inputs)? What are gender-specific opportunities?
- **Gender effects of economic upgrading:** Are there gender-intensified constraints to economic upgrading (for example, job segregation, limited access to skills, training, technology, credit, and other resources)? How far does gender inequality undermine workers’ productivity and managerial efficiency (process upgrading)? Do women have access to the necessary skills and technologies for quality improvements and to credit and other resources for investments (product, functional, and chain upgrading)? What are the gender-specific effects of economic upgrading?
- **Gendered policies:** What policies are required to ensure that women can access GVCs, improve their positions, and gain from economic upgrading? How can trade policy, export promotion policies, and GVC interventions target gender-intensified constraints? What other policies and actors (for example, lead firms and industry associations) are needed to tackle gender-intensified constraints?

The three sectoral analyses are structured on the same format, which includes four sections:

- **Section 1** outlines the basic structures of the GVC, its main actors (particularly lead firms and governance patterns), as well as upgrading trajectories, and opportunities and constraints for upgrading.
- **Section 2** describes relevant gender dimensions and dynamics specific to the GVC on a global level, including the gendered employment composition of the industry, the roles and positions of women versus men in different stages of the GVC, gender-intensified constraints and opportunities, and the relationship between upgrading and gender dynamics.
- **Section 3** presents a country case study to assess in more detail the gender dimensions of the GVC and economic upgrading processes.
- **Section 4** offers policy recommendations, drawing on the country case study and the broader global context, to help mitigate gender-specific constraints to economic upgrading, ensure upgrading benefits can be accessed by women and men, and foster competitiveness and economic upgrading in GVCs as well as gender equality.

Conclusions of the Sectoral Case Studies

The three sectoral studies show that GVCs and their economic upgrading dynamics have significant gender dimensions, and that integration and economic upgrading in GVCs are influenced by, and have an impact on, gender relations. Although different dynamics operate in the three sectoral GVCs and the case study countries that are discussed in detail in the next chapters, common conclusions can be drawn.

First, in all three sectoral studies, patterns of job segregation are observed and deeply rooted in global and local social constructs and perceptions of what is considered appropriate male and female work.¹⁰ Generally, men are favored for positions that require physical strength and technical know-how and skills; women are preferred for jobs that depend on finesse, dexterity, attention to detail, and/or social and caring competences. Further, women are often preferred for flexible work arrangements, which is commonly explained as fitting the needs of women who require flexibility in their paid work schedule because of their reproductive responsibilities (Barrientos 2001; Van Staveren et al. 2007). Although female work is often seen as generating secondary income in addition to men's primary income, in reality, many women support households by themselves. Often jobs where women are concentrated are perceived as low-skilled. This is related to gendered

perceptions of what is skilled and unskilled. Casting particular skills or functions as “feminine” allows recruitment of women at lower labor costs (Barrientos 2001).

Second, women as a group encounter similar gender-intensified constraints to participating and upgrading in GVCs. This finding concurs with the literature on gendered inequalities of economic opportunities. In all three industries, women have limited access to the education, skills development, and training required to participate in production processes (particularly in higher-value segments) and business operations within GVCs and to enable economic upgrading.¹¹ Access to training is often not overtly discriminative towards women, but it may be difficult for women to participate because they are not part of business networks and because training often takes place in the evening after work or on weekends, when women are responsible for unpaid household duties. Access to inputs and to networks and information, including technology, markets, and support services, is also crucial. However, access is limited for many female entrepreneurs and workers due to the dominance of men in most industry associations and trade unions. Further, women have less access to resources and financing necessary to participate in export production and international trade. With regard to public infrastructure and regulation, the indirect gender bias that results from established values and roles attributed to women is far more powerful than direct gender bias in laws, regulations, and bureaucratic processes (ITC 2007; Simavi et al. 2009).

Third, constraints related to women's primary responsibility for reproductive work are identified as important in all three studies. This social division of labor is deeply embedded in developed and developing countries, but poor infrastructure, particularly in rural areas, heightens this challenge for women in developing countries. Further, in many developing countries, these responsibilities cover not just the immediate family, but also the extended family. These responsibilities structure and often constrain the full engagement and the opportunities women have as workers, managers, producers, and

¹⁰ Besides these common patterns, there are also differences across regions. For example, trading is perceived as female work in Sub-Saharan Africa but as male work in large parts of Asia (Fontana 2009).

¹¹ The limited access seems to be less overt in general primary, secondary, and even tertiary education, where in many countries women have importantly caught up relative to men (Tejani and Milberg 2011). Access is more problematic in skill development programs and training on the job, particularly in technical and management fields.

entrepreneurs. In some cases, women's participation in the paid economy is entirely restricted by their reproductive responsibilities and roles, while in others, they are a burden women bear in addition to their productive work.

Fourth, the case studies highlight that upgrading efforts have gender implications, and, in turn, gender inequalities have an impact on and often constrain upgrading efforts. Gender inequalities can both facilitate and inhibit industry competitiveness. Low wages and flexible employment of predominantly female workers in the horticulture and tourism industries help employers offer cost-competitive products. Similarly, female agent-level workers in the call center industry help drive cost-competitiveness (at a higher skill level compared to the other two industries). On the other hand, lack of training and career development of female workers can result in a shortage of qualified labor, limiting productivity and preventing upgrading. In addition, the gender-intensified constraints on access to resources and networks inhibit female producers and entrepreneurs from participating and upgrading in GVCs. Education and training for producers, entrepreneurs, and waged labor are fundamental to meeting the increasingly strict requirements and standards set by global lead firms. Access to financing is key to implementing required changes for producers and entrepreneurs to pursue economic upgrading and to comply with lead firms' standards. Exclusion from networks and restricted access to information can also limit entrepreneurs' and producers' knowledge of new products and requirements of export markets.

Based on these common conclusions, potential policy interventions should focus on the following areas to help mitigate gender-specific constraints to economic upgrading; ensure that upgrading benefits are available to women and men; and foster competitiveness, economic upgrading, and gender equality in GVCs:

- **Increase access to training:** In all three industries, women have limited access to education, skills development, and training. Access to training for women needs to be enabled and encouraged, and training programs need to be scheduled and organized in such a way that women can attend. Moreover, training programs must take into account cultural and social norms that may prevent women from interacting with men. Training would be particularly beneficial in the areas of management and technical skills that can help meet lead firms' requirements. In addition, there should be standardized recognition of all skills required for particular industries through certification programs, regardless of whether these skills were obtained through formal education, training, or life experience. This recognition would be crucial
- **Improve access to information and networks:** In all three studies, business networks are dominated by men. Similarly, female workers are underrepresented in trade unions. Strong women's groups and associations can provide female workers and producers/entrepreneurs with a voice in policy making and increase their bargaining power. A crucial policy area is to support these groups by financing capacity building in networking and leadership.
- **Increase access to finance:** Access to finance is crucial, in particular for female producers/entrepreneurs, to fund the investment necessary to fulfill requirements and standards of global lead firms and to initiate upgrading processes. The horticulture and tourism studies stress the need to address gender-intensified constraints regarding access to credit by raising awareness among financial institutions, developing innovative financial instruments, and improving financial literacy.
- **Address the gender division of reproductive work:** This is a longer-term challenge, but good policy can help reduce the work burden related to reproductive responsibilities and free up women's time to participate in productive activities. Such policies would involve addressing inadequate infrastructure, such as access to water, electricity, transport, and other basic household requirements. They could also promote regulations and services that help reconcile the logistics of paid and unpaid work, including childcare, maternity and paternity leave, reproductive rights, and social provisions such as housing, health care, and transport from and to work (Barrantos et al. 2003).
- **Engage lead firms in reducing gender-based discrimination:** Given the power of lead firms in GVCs, they can play a key role in driving change by developing gender-sensitive employment, training, and sourcing policies. For this, they would need to first provide training for supervisors and managers in management skills, gender discrimination, and sexual harassment. Lead firms could encourage and help their suppliers implement similar gender-sensitive policies, and could enforce policy application through third-party monitoring.

In addition to these specific policy interventions, trade policy, export promotion programs, and GVC interventions need to address gender-intensified constraints to competitiveness and upgrading. Policy makers must rec-

ognize the gender-differentiated dynamics, constraints, and opportunities in GVCs and the often intensified constraints that women face as workers, managers, producers, and entrepreneurs. Such an assessment involves understanding the positions and roles men and women have in export sectors and GVCs and what their rewards, constraints, and opportunities are. To understand this,

collecting sex-disaggregated data with regard to employment, activities, and rewards and approaching women's groups, female producers, and women workers' associations and networks will be relevant. Integrating gender into trade and sectoral policy formulation is key, first, to make policies more effective, and second, to reach broader development objectives, including gender equality.

Global Value Chains, Economic Upgrading, and Gender in the Horticulture Industry

Penny Bamber and Karina Fernandez-Stark

Executive Summary

This chapter explores gender dynamics in the horticulture industry. We use the global value chain (GVC) framework to provide policy makers with recommendations to encourage industry upgrading and gender equality in developing countries. Multiple examples and best practices from a range of countries are described, and the case of Honduras is explored to portray the dual dynamics of gender relations and upgrading.

The horticulture industry is particularly beneficial to developing countries because of its higher returns and employment. Cultivation of fruits and vegetables is substantially more labor intensive than cereal crops and offers significantly more post-harvest opportunities to add value. Several developing countries have successfully upgraded into packing and processing, and the number of women employed in the sector has increased significantly. This paper examines the resulting gender composition of the value chain and explores gender-related factors that constrain or enable industry upgrading and growth.

Key findings of the chapter are outlined below.

The Horticultural Value Chain: Organization, Governance, and Economic Upgrading

- The horticultural value chain includes several segments: inputs, production, packing and storage, processing, and distribution and marketing. The chain is buyer-driven; the lead firms are large supermarkets in key markets.
- The value chain is governed by public and private standards, which control sanitary and phytosanitary conditions, quality, quantity, traceability, pesticide use, and so forth. Through these standards, lead countries and firms dictate which products are produced, how, and when, often shaping access to end markets.
- Market access in the value chain is further regulated by trade agreements. Governments tend to use instruments to protect their domestic fruit and vegetable

industries, including seasonal tariffs, tariff escalation, and direct subsidies. These can affect the relative competitiveness of the industry in developing countries and impede upgrading into higher-value activities.

- Initiatives to foster growth in the industry can help drive upgrading, enhance competitiveness, and facilitate an increase in international trade. Examples include the provision of training to meet standards, facilitating access to information on potential markets, increasing availability of appropriate financial instruments, improving institutional frameworks such as the regulation of sanitary and phytosanitary conditions, and improving infrastructure.

Gender Dimensions of the Horticulture Value Chain

- Strong gender bias in the distribution of roles spans geographic boundaries and cultural dimensions. Men are favored for positions that require physical strength. Women are preferred for jobs that depend on finesse, dexterity, and attention to detail. There is also gender bias with respect to crop types.
- Women participate in all stages of the value chain, although they are concentrated in the higher-value packing segment. Upgrading can benefit women by increasing female participation in higher-paying jobs. In addition, urban migration of young men has resulted in women taking over family plots, so they are slowly becoming increasingly important in production (Chan 2010).
- Several constraints limit developing countries from reaching their full potential in the industry. These include access to training, infrastructure, finance, education, and information. Such constraints are intensified for women.
- Constraints differ according to the roles women play. Three key roles for women are wage labor; unpaid family labor in smallholder operations; and entrepreneurs, who independently cultivate crops.

The principal constraints faced by these women are:

Women as wage labor:

- Different wages and contractual conditions from men
- Flexible employment that heightens uncertainty
- Limited access to training
- Sexual harassment

These constraints can both facilitate and inhibit industry competitiveness. Low wages and flexible employment of predominantly female workers help reduce employers' costs. In these cases, decisions tend often to favor short-term gains over long-term productivity, and women pay the price. The lack of training can limit productivity and prevent upgrading into more sophisticated segments of the chain—particularly those that depend on women.

Unpaid labor in smallholder production:

- Lack of recognized work
- Lack of remuneration

While these characteristics affect both men and women, they affect more women due to their higher participation in unpaid family labor.

Women as entrepreneurs:

- Limited access to land and finance
- Limited access to education and training
- Limited access to networks, information, and markets

These constraints can limit female entrepreneur participation in international horticulture trade, because they encompass most aspects of successfully operating a business in the sector. Education and training are fundamental to meeting global buyers' increasingly strict standards, while access to finance is key to implementing required changes and becoming a certified supplier. Exclusion from networks and restricted access to information can also limit the entrepreneur's knowledge of new products and requirements. Buyers can exacerbate these challenges by preferring to deal with male-led organizations.

Policy Recommendations

Policy changes to mitigate gender-intensified constraints can be driven by key stakeholders, including the public sector (trade ministries, export promotion agencies, and so forth), the private sector (lead firms), industry associations, nongovernmental organizations (NGOs), international

development organizations, and local women's associations. For example, lead firms can play a key role in driving change due to their power. The public sector can mitigate constraints by influencing the local institutional setting.

Policy recommendations to minimize gender-based constraints in the horticulture industry and secure women's access to benefits of economic upgrading include the following:

- Increase awareness of women as valuable economic agents. Policy has often mistakenly assumed that the industry is male-based.

Wage labor:

- Reach equality in wages and labor conditions. Legislated social protection must achieve a balance: implementing conditions that feasibly can be introduced without undermining the competitiveness of the industry. When such legislation has been highly protective, it has sometimes harmed the industry, as in Colombia's cut flower sector, where increased social protection reduced employment (Dolan and Sorby 2003). In Honduras, significant increases in minimum wage requirements and job protection legislated in 2009 would have crippled the horticulture industry and thus were ignored by both the private sector and the government.
- Minimize the burden of flexible labor, which most frequently falls on women. Requiring employers to provide full-time employment generally is unfeasible, because it reduces short-term competitiveness. Alternative measures must be taken. For example, to increase year-round work opportunities, encourage process and product upgrading, such as product diversification; the cultivation of complementary high-value crops; and the introduction of new technologies, such as greenhouses. This favors employment of both men and women in production and pack house for longer periods, reducing the burden of flexible labor requirements.
- Recognize skills required in the industry through certification, regardless of whether they were learned through formal education, training, or experience. Some of the most successful developing countries in the industry have adopted this approach. Public-private partnerships that bring together lead firms, educational institutions, and public authorities are, perhaps, best positioned to provide these certifications.
- Train male supervisors and managers with respect to management skills, sexual harassment, and discrimination. The resulting enhanced work environment increases productivity.

Unpaid family labor:

- Educate smallholders that off-farm female work can raise their income.
- Engage smallholders as integrated family units, rather than interacting only with male heads of household. Engaging women as integral to production can help empower them within the family.

Entrepreneurs:

- Encourage and train smallholders to pursue complementary products based on generally female-dominated crops and those that can be more efficiently produced on small plots. Female producers should be encouraged to grow high-value crops.
- Raise financial institutions' awareness of the female-producer market, develop innovative financial instruments, and improve financial literacy to facilitate women's access to credit. Consistent with findings of female participation in microfinance (D'Espallier et al. 2011), female vegetable producers have been found to be more rigorous than their male counterparts in loan repayments.
- Educate and train smallholder producers in business development and management skills and in technical education related to cultivation and post-harvest handling, such as pesticide use, traceability, and new technologies that can help producers meet lead firms' quality and consistency requirements. Training should be scheduled and located so female producers can attend, and should take into account cultural and social norms that may prevent women from interacting with men from outside their immediate family.
- Encourage female smallholders to pursue niche markets, including organic, fair trade, and the practices of the Ethical Trading Initiative (2011). These products receive higher premiums and may require fewer inputs (organic prohibits pesticides), which can lower costs and increase income.
- Support female associations by assisting capacity building in networking and leadership. Strong female associations, such as India's Self-Employed Women's Association (SEWA), provide female producers with a voice in policy making and increase their bargaining power.

Introduction

Since the 1980s, international trade of fruit and vegetables has grown tremendously, driven by rising incomes and the expansion of the middle class worldwide. At the beginning

of the twenty-first century, global horticulture exports were US\$56.1 billion. By 2008, they had more than doubled to US\$139.6 billion (UN Comtrade 2011).¹² Motivated by growing demand, developing countries have pursued the production and export of these high-value agricultural products and have successfully captured a large share of the horticultural¹³ market.

The horticulture export industry offers these countries an important new source of employment. Cultivation of fruits and vegetables is substantially more labor-intensive than growing cereals (Joshi et al. 2004; World Bank 2009) and provides more post-harvest opportunities to add value. Packing and processing services, such as washing, chopping, and mixing, as well as bagging, branding, and applying bar codes are now often carried out at the source rather than at the end market destination. In particular, a large number of women have entered the industry to work in both production and post-harvest jobs, leading numerous authors to hail this as the "feminization of agriculture" (Deere 2005; Lastarria-Cornhiel 2006; Zuo 2004).

Entry into and growth of the horticultural sector has been widely promoted by governments and development agencies alike (Dolan and Sorby 2003), and the sector is beginning to garner increased attention academically (Aksoy and Beghin 2005; Dolan et al. 2009; Farina and Reardon 2000; Maertens and Swinnen 2009a; McCulloch and Ota 2002; Weinberger and Lumpkin 2007). In addition to driving export growth, the increased demand for female labor is believed to have important consequences for gender equality and poverty alleviation in rural areas. This is because of the tendency of women to use more of their income for child nutrition and education than men (Weinberger and Lumpkin 2007).

However, a gap continues in the literature regarding the gender implications (Maertens and Swinnen 2009a) of this growth, and deeper analysis of the benefits and constraints on male and female participation is warranted before pro-gender claims may be made. The gendered structure of the sector, that is, access and exclusion of men and women within different segments of the industry, must be unpacked to fully measure its potential benefits. Specifically, the social context within which the industry is inserted can intensify participation

¹² Fruit and vegetables consumption has been positively correlated with income levels, with per capita consumption being the highest in high-income countries (Wu Huang 2004).

¹³ Generally, the term "horticulture" includes the production of cut flowers in addition to fruits and vegetables. Cut flowers, however, are not included in this study and references to horticulture in this paper refer to the fruit and vegetable sectors.

constraints for women. These practices draw heavily on local and global social constructs of gender-appropriate roles both in the workplace and the home, and can limit women's potential to fully benefit from their insertion in the industry.

In this paper, we analyze the gender dynamics and implications of upgrading in the fruit and vegetable industry, taking into account gender-intensified constraints and opportunities by examining aspects of male versus female participation. This is not only crucial to understanding the gendered impacts of export growth in the industry, but also to understand how gender dynamics can improve or constrain competitiveness and upgrading processes.

A gendered GVC framework is used as a basis for this study. By focusing on the sequences of value added, from conception to production to end use, GVC analysis provides a holistic view of the industry: both from the top down by examining lead firms, the governance of their supplier networks, and the institutional and social contexts in which the chains are embedded; and from the bottom up, by analyzing how these business decisions affect upgrading or downgrading trajectories in given countries. The gendered approach uncovers how gender is ingrained in all aspects of the chain and the processes of economic upgrading.

The chapter is structured as follows: First, we present the fruit and vegetable value chain, identifying lead firms and governance patterns of the global industry as well as opportunities and constraints for upgrading by different types of firms. Second, we examine the gender dynamics of horticulture, highlighting differences in gender contributions to the chain. In particular, we highlight specific gender opportunities and constraints to upgrading by focusing on the three roles in which women participate: as waged laborers, as unpaid family labor, and as entrepreneurs. This is followed by a discussion of the two-way relationship between upgrading and gender dynamics. Third, we examine the industry evolution in Honduras, a country case study of the sector. Honduras was selected for analysis because of its success, despite its low level of development, in incorporating multiple production models into the sector and increasing female participation. Drawing on both the country case and the broader global context, we present policy recommendations that address the following goals: (i) help mitigate gender-specific constraints to upgrading, (ii) secure upgrading benefits for women, and (iii) foster continued and expanded decent work for women as workers and entrepreneurs in the horticulture sector around the world.

The Fruit and Vegetable Global Value Chain

Analysis of the structure of the fruit and vegetable GVC, along with examination of the distribution of power and influence, provide the foundation for understanding the upgrading and gender dynamics of the industry. Since the 1980s, the structure of the industry has changed substantially. New lead firms have emerged and functions have shifted from developed to developing countries as the latter have gained expertise. This section first outlines the structure of the value chain, followed by a discussion of lead firms, chain governance, and production models. Potential upgrading trajectories are then discussed, along with general constraints facing firms making the corresponding business decisions in developing countries.

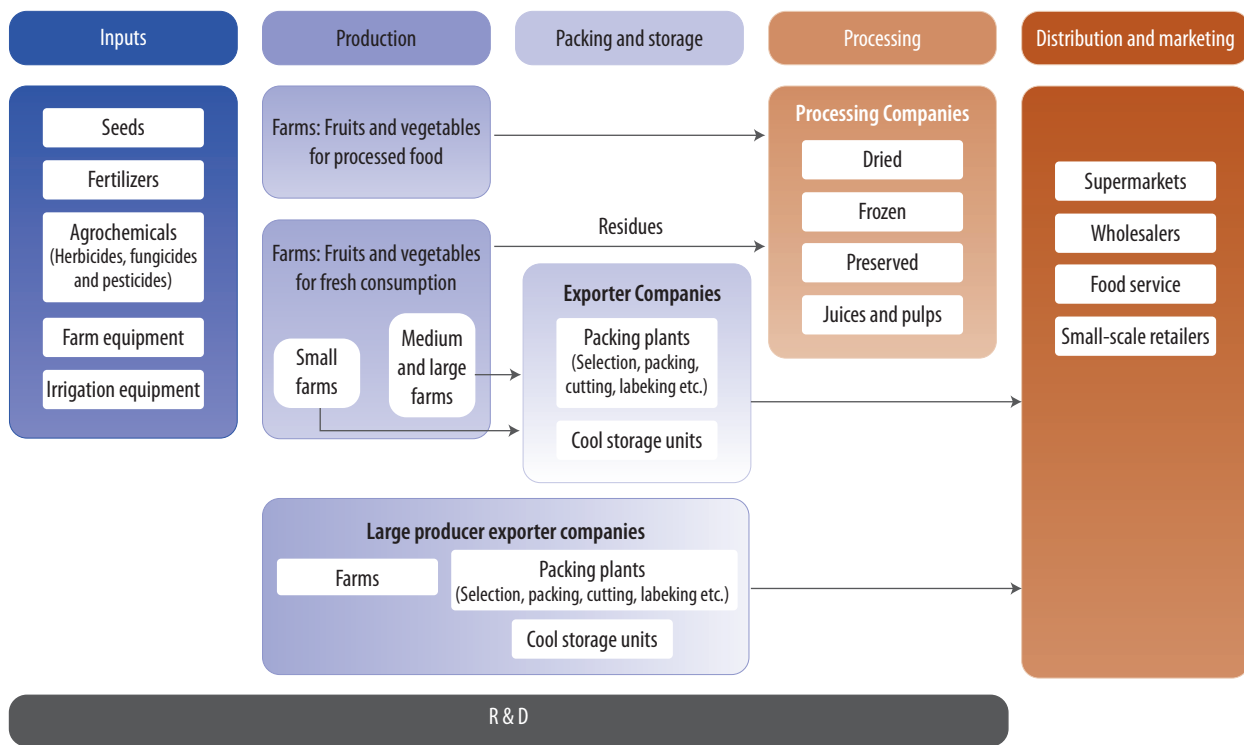
Structure of the Fruit and Vegetable Global Value Chain

The fruit and vegetables GVC is presented in figure 2.1.

This GVC includes several segments: inputs, production, packing and storage, processing, and distribution and marketing. The most important inputs for the industry are seeds, fertilizers, agrochemicals (herbicides, fungicides, and pesticides), farm equipment, and irrigation equipment. Logistics and transportation fulfill key supporting functions, and due to the fragile and perishable nature of the product, a high degree of coordination among different actors along the chain is required. This ensures that the perishable product reaches its destination in good condition. Cool storage is used throughout the chain to keep produce fresh, and both air and sea freight are key elements to ensure timely delivery.

Production is divided between production for fresh consumption and for processing. In some cases, the fruit and vegetables not accepted for sale as fresh produce are used for processing. In other cases, such as orange juice or preserved peaches, different varieties and qualities are required for fresh consumption and production occurs separately. Developing countries have exploited their comparative advantages in climate, land, and labor to excel in this segment of the chain.

Packing and storage are usually carried out by large exporters or producer exporters who consolidate the fresh fruit and vegetables, package, store, and export them. The first activity within the packing segment is grading. Unacceptable, low-grade produce will be redirected to processing plants or the domestic market. Washing, trimming, chopping, mixing, packing, and labeling are other processes that may occur in this stage of the value chain.

Figure 2.1. Fruits and Vegetables Global Value Chain

Source: Center on Globalization, Governance & Competitiveness (CGGC), Duke University.

Many of these tasks are generally taken on by female employees. Once the produce is ready for transport, it is blast chilled and placed in cold storage units. Packing usually requires economies of scale due to the high costs of cold storage and other inputs.

Processed fruits and vegetables include dried, frozen, preserved, juices, and pulps. Many of these processes add value to the raw product by increasing their shelf life. Processing firms export their products under their own brand as well as under the buyer's brand.

Distribution and marketing are the last stage of the value chain before consumption. Produce is distributed to different channels, including supermarkets, small retailers, wholesalers, and food services.

Industrial Organization and Chain Governance

In this section first we analyze the industrial organization of the horticulture GVC, showing how the supply chain of fruits and vegetables in developing countries has consolidated to remain competitive. Second, we explain how the buyers (the lead firms) that govern the chain have established strict global standards, which have become

significant barriers to entry. Finally, we address several trade regulations faced by the sector.

The horticulture industry is organized by interactions and linkages between different-sized firms. At the production level, there are small, medium, and large farms. Large producers often buy from small and medium farmers (referred to as outgrowers) to supplement their production for export; these firms are referred to as producer-exporters. In addition, in many countries, there are also exporters who do not produce but buy from independent outgrowers (Gereffi et al. 2009).

Producer-exporters usually consist of a few large multinationals plus a large number of medium-size domestic firms. Strong domestic firms in some developing countries, such as Kenya and Chile, have expanded abroad and have vertically integrated along the value chain (Fernandez-Stark et al. 2011a). Producer-exporters often consolidate vertically, through (i) backward integration of exporters to production and increased dominance of large farms; (ii) contracted supply from outgrowers whereby the farmer may receive inputs, credit, technical assistance, and guaranteed sales from the exporters; and (iii) noncontracted supply from in-

dependent growers (Jaffee and Masakure 2005). Large farms are mostly used for products with strict quality and traceability requirements, because coordination and control is centralized in management. These large producers typically have greater access to the financial capital necessary to make the investments needed to meet these rigorous requirements. Exports from these firms may be in bulk, or they may take advantage of opportunities to provide sophisticated packing services, washing, chopping, and mixing products prior to export. These firms may undertake other important high-value functions such as product development and innovation (Humphrey 2005).

Opportunities for smallholder outgrowers are often more limited to domestic or regional markets or to developing countries, where standards are not as rigorous and compliance is less expensive (Boselie et al. 2003; Neven et al. 2009). For example, much of Morocco's citrus supply goes to the Russian Federation, where standards are lower than other European markets, whereas Jordan exports a significant proportion of its vegetables to countries of the Pan-Arab Free Trade Area, where lower quality does not limit market access. However, important opportunities do exist in the export of a subset of products to major markets that can be produced with greater efficiency by smallholders, such as berries, chili peppers, and certain Asian vegetables¹⁴ (Challies and Murray 2010; Cornelis and Meer 2006). In key European and North American countries, there are niche immigrant markets, such as that for sweet potatoes, and the food services industry purchases based on cost with less attention to monitoring pesticide residue and other quality requirements (Jaffee and Masakure 2005).

On the demand side, large supermarket chains are the leading actors in key fruit and vegetable markets, with controlling market shares across Europe and increasingly in the United States.¹⁵ These buyers, such as Sainsbury's, Marks & Spencer, and Wal-Mart, seek enhanced competitiveness and consistency from their global supply chains. As Gereffi and Lee (2009) note, they exert significant influence over the entire value chain and dictate how fruit and vegetables are produced, harvested, transported, processed, and stored. In addition, governments of developed countries have created standards, usually aimed at food safety. The outcome has been a complex system of multiple standards at national, regional, and international levels. These private standards also include codes of conduct that both large and small producers around the world are required to adopt in order to maintain their access to markets (Dolan 2004; Henson and Humphrey 2009; Jaffee and Masakure 2005).

Table 2.1 highlights some of the more prominent standards governing the horticulture industry today.

These standards are characterized by a lack of harmonization across countries, both in requirements and enforcement mechanisms, which adds significant cost to compliance. Private standards typically have had greater impact than public standards, which suffer both from underinvestment on the part of governments and are subject to World Trade Organization evaluation (Gereffi and Lee, 2009; Henson and Humphrey, 2009). GlobalGAP, an outgrowth of EurepGAP, is one of the most widely adopted standards. This standard was first developed in Europe in 1997 by an association of European fresh produce importers and retailers, and principally concerns pesticides and chemical use and application as well as the environmental impact of farming systems. Retailers in the United States began to adopt this standard for fresh produce in 2008 (GlobalGAP 2008). GlobalGAP has also begun approving national GAP programs, such as ChileGAP and KenyaGAP, to help reduce costs by shifting the certification process back to local organizations in the developing countries.

These standards can be met by training workers, acquiring information, accessing finance, and the establishment of appropriate institutional sanitary and phytosanitary frameworks. Trade barriers designed to provide protection to local producers in industrial countries, such as seasonal tariffs, special duties, and quotas and subsidies to farmers in the importing countries, impede competitiveness of developing country producers and are much more difficult to address locally. Regional seasonal tariffs can be as high as 132 percent for these products should preferential status not apply (Diop et al. 2005). Tariff escalation barriers, in particular, affect potential expansion into higher value-added activities. Protection against processed fruits and vegetables may directly impede important value-added activities from being carried out by developing countries by restricting access to markets. In many cases, these processed products are excluded from preferential agreements, and "restrictive rules for many processed products have severely limited the role of trade preferences in encouraging agricultural diversification in developing countries" (Brenton and Ikezuki, 2005).

Agriculture trade barriers have been debated for decades. However, little progress has been made towards

¹⁴ Asian vegetables include okra, eggplants, Asian cabbage, and so forth.

¹⁵ The evolution of the horticultural industry and the emergence of supermarkets as dominant powers is well documented in the GVC literature. See Humphrey et al. (2004).

Table 2.1. Prominent Standards in the Horticultural Industry

	Public		Private	
	Mandatory	Voluntary	Individual	Collective
National	<ul style="list-style-type: none"> National legislation (pesticide use, labor regulations, sanitary inspections, and so forth) USDA standards 	<ul style="list-style-type: none"> HACCP certification USDA National organic program 	<ul style="list-style-type: none"> Nature's Choice (Tesco) Field-to-Fork (Marks & Spencer) Terre et Saveur (Casino) Conad Percorso Qualità (Italy) Albert Heijn BV: AH Excellent (The Netherlands) 	<ul style="list-style-type: none"> British Retail Consortium (United Kingdom) Assured Foods Standards (United Kingdom)
Regional	<ul style="list-style-type: none"> European Union Regulations 		<ul style="list-style-type: none"> Filières Qualite (Carrefour) 	<ul style="list-style-type: none"> EurepGap Dutch HACCP Qualitat Sicherhiet (QS)—Belgium, Holland, Austria International Food Standard (German, French, Italian)
International	<ul style="list-style-type: none"> World Trade Organization 	<ul style="list-style-type: none"> ISO 9000 ISO 22000 	<ul style="list-style-type: none"> SQF certification 1000/2000/3000 (United States) 	<ul style="list-style-type: none"> GlobalGAP Global Food Safety Initiative Social Accountability International, SA8000® Certification IFOAM Standard

Sources: Gereffi and Lee 2009; Henson and Humphrey 2009; Jaffee and Masakure 2005.

Note: HACCP = Hazard Analysis & Critical Control Points; IFOAM = International Foundation for Organic Agriculture; ISO = International Organization for Standardization; SQF = Safe Quality Food; USDA = United States Department of Agriculture.

trade liberalization, limiting unfair distortions, and allowing more participation from developing nations. Although there is agreement from a diverse group of development and trade advocates that a reduction of agricultural protectionism is important to stimulate growth and upgrading opportunities for developing countries, it is a politically complex issue in industrialized countries where powerful lobbies protect domestic interests.

Economic Upgrading Trajectories

Despite the challenges highlighted in the preceding sections, upgrading of the horticulture industry in developing countries has been significant over the past two decades. Multiple firms or key suppliers within these countries began to provide higher value-added activities, fostered by improved knowledge in production, advancements in logistics and shipping technologies, increased access to information about market demand and trends, and the capacity to comply with stringent standards.

Functional upgrading or the shift into higher-value segments of the value chain, as defined by Humphrey and Schmitz (2002: 1020), has largely been linear, moving from production to packing, to processing, and finally to controlling distribution and marketing.¹⁶ While these upgrades yield important revenue, evidence suggests countries only upgrade when they have successfully consolidated their position in lower segments of the value chain. This has been the case of upgrading into processing, which has failed when production levels could not be sustained to provide enough raw materials to leverage the investments made in processing infrastructure (Mungai 2000).

Product and process upgrading involve moving into more sophisticated product lines and increasing efficien-

¹⁶ Lee et al. (2010) suggest that the rise of the fresh fruit and vegetable exporters may indeed shift the governance of the chain to a bilateral oligarchy with powerful suppliers challenging the large retail houses.

cy by reorganizing production and improving technology. These steps play a central role in increasing the sector's contributions to developing country economies. These contributions include the introduction of new technologies in production, such as irrigation and greenhouses, or in the pack house with more efficient grading, washing, and packing techniques, as well as incorporating the cultivation of higher-value products.

As outlined in Table 2.2, the most important potential benefit of upgrading trajectories in horticulture are increased returns on existing investments including land, infrastructure, inputs and knowledge by augmenting the use of physical resources or by adding value to products already produced. Other specific benefits include: a) decrease in risk due to disease (*process upgrading*: installation of greenhouse technology and engaging geographically disperse outgrowers) and due to changes in the price and global markets (*product upgrading* in both production and packing segments: crop diversification); b) reduction of costs such as transport and training (*product upgrading* in production and packing by filling a container instead of paying for a half full one); and c) an increase in productivity in all segments by providing management training (*process upgrading*). As costs decrease and productivity and consistency increase, producers become more competitive in the global market.

Limited market access and a shortage of capital are producers' key upgrading constraints. They are generally best overcome by larger producers that have direct access to exporters for information regarding market demand and to financing, either directly from the buyers or from financial institutions. In addition, larger producers can achieve economies of scale. Smallholders tend to experience greater difficulty in overcoming these constraints. For example, even if they are able to secure the required information and capital to upgrade, the lack of domestic markets for many of these crops increases their risk and reduces their incentive to diversify.

Diversification may require resource-provisioning contracts with guaranteed purchase in order to share the risk between the exporter and the smallholder. Easing credit access for smallholders already in the value chain, either directly through buyers or through specifically designed instruments, can help minimize financial constraints to upgrading, while programs that facilitate both large and small producers' access to market information can help overcome constraints. For example, ProChile, the Chilean export promotion agency, regularly organizes delegations of producers and exporters to visit international trade fairs, and provides documentation regarding requirements for leading markets.

Table 2.2 highlights key upgrading opportunities in developing countries. It identifies the potential benefits as well as the constraints faced to successfully move into higher-value activities.

Gender Dimensions of the Horticulture Global Value Chain

The dynamics of upgrading and the consolidation of the industry described in the preceding sections have reciprocal effects with gender dynamics.

Upgrading leads to changes in employment patterns, particularly with respect to the gender composition of the workforce, while gender-intensified constraints can curtail women's access to the benefits of upgrading. Although a few studies have been carried out regarding the impact of these changes on women,¹⁷ a gap continues in the literature regarding a more general view of gender implications and their relation to upgrading (Maertens and Swinnen 2009a). This section seeks to address this knowledge gap by examining the main gender issues in the industry; exploring the differences in representation, opportunities, and constraints of women and men in the value chain; and tracing the relationship of these to economic upgrading.

First, we examine the gender composition of the industry by highlighting job profiles that are dominated by either men or women. This is followed by a discussion of the gender-intensified constraints faced by women and their dampening effects on upgrading potential. Finally, a brief overview of gender bias in crop production and post-harvest management precedes a discussion of the relationship between gender dynamics and economic upgrading.

Gender Composition

A strong gender bias in the distribution of roles is deeply rooted in global social constructs and perceptions of what is appropriate male and female work and of traditional responsibilities of men and women to the household. Men are favored for positions requiring physical strength and jobs involving an element of danger, such as operating machinery (Lastarria-Cornhiel 2006) and spraying pesticides; women are preferred for, and potentially self-select (Tanzania Plantation and Agricultural Workers Union 2011), jobs that depend on finesse, dexterity, and attention to

¹⁷ Dolan (2001) points to the fact that female farmers are disadvantaged in contract-farming schemes in the Kenyan horticulture sector. Barrientos et al. (2001) and Barrientos, (2003) indicate that female farm workers are exploited in the South African deciduous fruit sector.

Table 2.2. GVC Upgrading in Horticulture: Opportunities, Benefits, and Constraints

Segment of the GVC	Type of upgrading	Description	Potential benefits	Key constraints
PRODUCTION	Functional upgrading	Shift from cereal production to higher-value agriculture	<ul style="list-style-type: none"> • Access to multiple new markets and increased demand • Increased employment 	<ul style="list-style-type: none"> • Certification in global standards and Training, such as Global Good Agricultural Practices (GAP), Institutional (compliance with phytosanitary and sanitary requirements) • Transportation infrastructure • Market information, access, and tariffs
	Product upgrading	Product diversification into multiple different crops	<ul style="list-style-type: none"> • Multiple seasons in one year • Increased return on investment (ROI) for infrastructure, land resources, networking expenses, and training • Buffer to risk of changing prices, crop-specific disease, and climatic changes • Increased employment 	<ul style="list-style-type: none"> • Seeds inputs • Crop-specific production information and training • Capital to finance more than one crop a season • Crop may not have a domestic market to absorb oversupply or rejected product • Market information, access and tariffs
		Upgrading into higher-value products	Increased ROI for infrastructure, land resources, and networking expenses. Increased labor intensity	<ul style="list-style-type: none"> • Seeds inputs • Capital to finance higher-value (but normally higher-risk) product • Crop specific production information and training • Crop may not have a domestic market to absorb oversupply or rejected product • Market information, access, and tariffs
	Process upgrading	Installation of greenhouse technology	<ul style="list-style-type: none"> • Increased ROI on infrastructure, land resources, and training • Multiple growing seasons in one year • Decreased risk to disease and climatic changes 	<ul style="list-style-type: none"> • Availability of technology • Capital to finance investment • Seasonal tariffs
		Installation of drip irrigation technology	<ul style="list-style-type: none"> • Increased ROI on water and pesticide • Lower labor costs for irrigation 	<ul style="list-style-type: none"> • Availability of technology • Capital to finance investment • Seasonal tariffs
		Use of small plots for production to increase efficiency and reduce risks (for example, smallholders for jalapeno production)	<ul style="list-style-type: none"> • Decreased risk to disease • Decreased labor costs • Increased ROI on networking costs 	<ul style="list-style-type: none"> • Transaction costs of organization and management • Training costs of outgrowers

(Continued on next page)

Table 2.2. GVC Upgrading in Horticulture: Opportunities, Benefits, and Constraints (continued)

Segment of the GVC	Type of upgrading	Description	Potential benefits	Key constraints
PACKING and STORAGE	Functional upgrading	Upgrading from only production into packing as well	<ul style="list-style-type: none"> Increased ROI on cultivated produce by adding value Increased employment 	<ul style="list-style-type: none"> Cold shipping and storage technologies Market information and access Capital to finance investment Certification in standards
	Product upgrading	Product diversification into multiple different crops	<ul style="list-style-type: none"> Multiple growing seasons in one year Increased ROI for infrastructure, training, and networking costs Decreased risk to changing prices Increased employment 	<ul style="list-style-type: none"> Market information and access Training costs for handling new products Capital for inputs
	Process upgrading	Additional packing processes are added, such as chopping, trimming, and mixing Improvement of management and supervisor quality	<ul style="list-style-type: none"> Increased ROI on infrastructure, land resources, training, and networking costs by increasing value of exported product Increased employment Retention of personnel, decline in training costs 	<ul style="list-style-type: none"> Market information, relationship with client Capital to finance investment Labor availability Availability of trainers and courses Capital to finance training
PROCESSING	Process upgrading	Installation of cold storage technologies	<ul style="list-style-type: none"> Increased ROI for infrastructure, land resources, training, and networking costs as product lasts longer Potential new markets Decrease in transportation costs as containers are shipped full or more often 	<ul style="list-style-type: none"> Availability of technology Capital for investment in equipment Capital for and availability of training
	Functional upgrading	Processing of produce prior to export, such as freezing, canning, pickling, and so forth	<ul style="list-style-type: none"> Additional value added product exported, greater earnings Increased employment Alternative use of oversupply 	<ul style="list-style-type: none"> Adequate supply of fresh fruits and vegetables Capital for investment in infrastructure and equipment Certification in standards Market information, access, and tariffs Coordination of the value chain Educated labor

Source: World Bank.

detail. Production jobs such as land preparation are mostly dominated by men, while harvest and post-harvest tasks, such as picking, grading, washing, chopping, and mixing, which closely resemble those of home food preparation, are traditionally assigned to females (Lastarria-Cornhiel 2006). Indeed, women comprise an estimated 70–80 percent of workers in these value-added activities, as well as packing, labeling, and bar-coding produce (Dolan 2005a), and they dominate quality control positions. The processing segment of the value chain is characterized by a more equal gender distribution. While both men and women face opportunities and constraints to participation in the value chain, many constraints are intensified for women, who have traditionally played less significant roles in the labor force. The following discussion highlights specific gender-intensified constraints by analyzing the three different roles women play in the horticulture value chain: waged labor, unpaid family labor, and entrepreneurs. Generally, female participation in the sector is high in developing countries. In waged labor, women make up at least 50 percent of the horticulture workforce in Chile, Ecuador, Guatemala, Kenya, Mexico, South Africa, Zambia, and Zimbabwe (Dolan 2005a; Maertens and Swinnen 2009a). In Senegal, women constitute about 90 percent of the workforce in the French bean and 60 percent in the cherry tomato sectors (Maertens 2009). In the Dominican Republic, women comprise roughly 50 percent of the labor force employed in processing products such as canned tomatoes and beans, frozen okra, and condiments (Raynolds 1998). Processing in Zimbabwe and Mexico has over 85 percent female participation (Dolan and Sorby 2003). Indeed, Dolan and Sorby suggest that “Many high-value agriculture commodity chains are characterized by growing levels of female employment, with gender a strong determinant for participating in these industries” (Dolan and Sorby 2003: 25).

Figure 2.2 provides an overview of female participation and the constraints they face at different stages of the value chain. Women’s participation as waged labor in developing countries is most notable in the packing and processing segment, while their participation as unpaid family labor is prevalent in the production segment of the global value chain. Female entrepreneurs are mostly found in production, although they play a part in fruit processing, particularly for the domestic market.

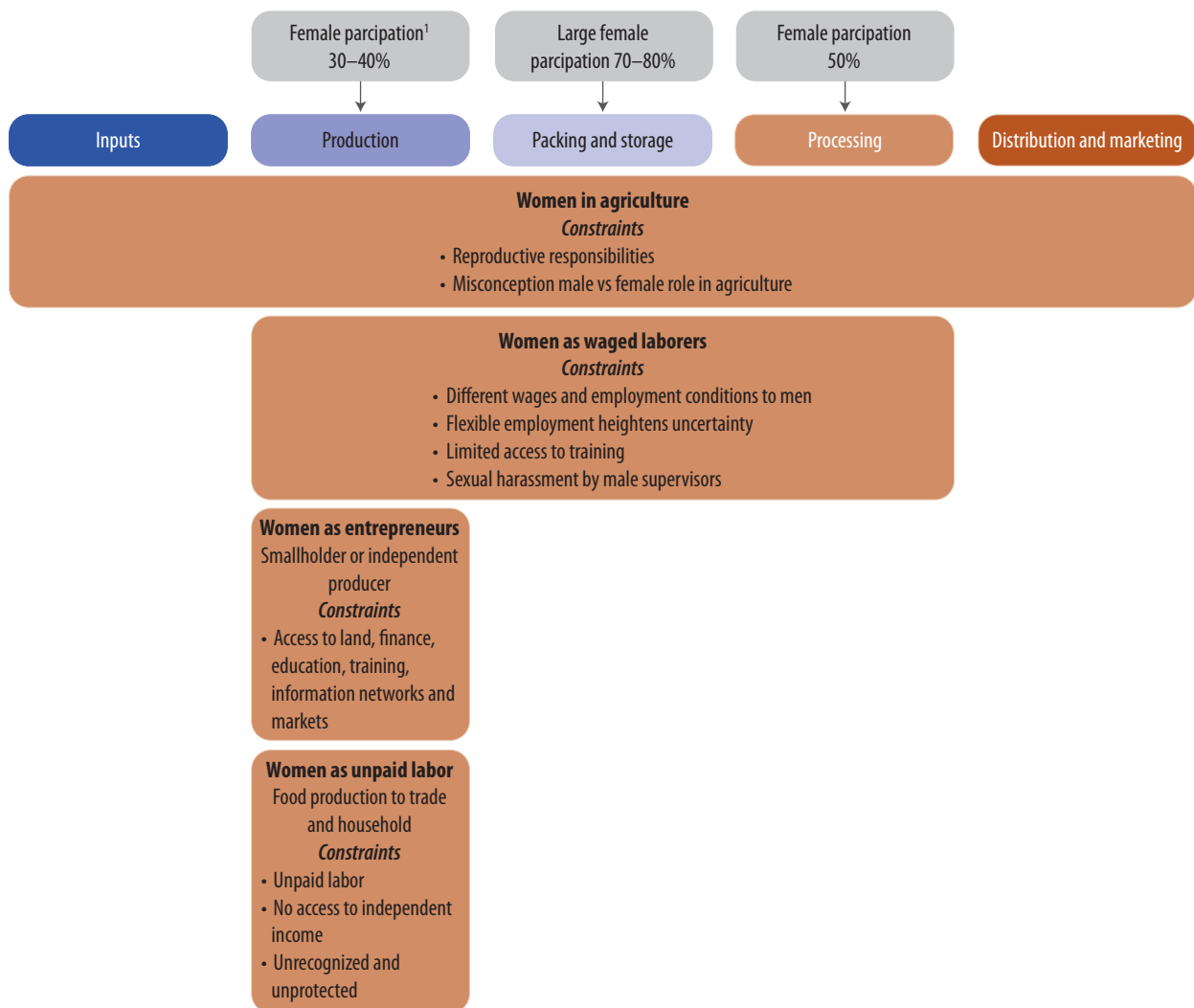
Notably, women appear to be migrating out of unpaid family labor into wage labor or entrepreneurial roles. With upgrading into packing and processing occurring in more developing countries, the presence of commercial pack houses in rural and urban areas is attracting young, unmarried females as waged laborers (Dolan 2004). Female income contributions from this off-farm work to family op-

erations can help ease liquidity constraints for smallholders (Maertens and Swinnen 2009b), creating opportunities for women to shift from their role as unpaid family labor. In addition, the number of waged women in agriculture, in general, is rising (World Bank 2009), and these women are less likely to return to the role of unpaid laborer. Indeed, there are indications the average age of waged female employees in the industry increases with its maturity in a country, suggesting that some women choose to remain employed in the industry over the long term (Dolan and Sorby 2003).¹⁸

Despite strong female participation in the horticultural workforce, full engagement of women remains limited by the demands of household and reproductive responsibilities (Barrientos et al. 2003; Deere 2005; Lastarria-Cornhiel 2006). The gendered division of household labor means that women typically assume the role of food provision, childcare, management of the home, and so forth. In many developing countries, these responsibilities cover not just the immediate family but also the extended family, and females, regardless of age or direct relationship, are expected to contribute to household chores. This social construct is deeply embedded in many cultures of both the developed and developing world (Miranda 2011); however, poor infrastructure, particularly in rural areas where the horticultural industry is based in developing countries, heightens this challenge. Under these conditions, women must spend a significant amount of time seeking out even the most basic supplies, such as water and firewood.¹⁹ In Tanzania and South Africa, women spend at least two hours more per day than men on domestic chores, while in India, women spend five times as much time as men dedicated to these duties (Budlender 2008b). In some cases, this limits participation in the industry entirely, while in others, it is a burden women bear in addition to their paid labor. In Senegal, Maertens and Swinnen (2009b) note that women of the same household take turns staying home to fulfill these needs, while the others go to work as waged laborers.

¹⁸ Dolan and Sorby (2003) note that in South Africa, where the industry has been established for some time, one fifth of the workforce was over the age of 40, while over half of the employees were married. In addition, they indicate that the majority of women engaged in the industry had children. At the end of the 1990s, in South Africa, 90 percent of employees in fruit production had children.

¹⁹ In some communities, these activities may take up to four hours a day (FAO 2003).

Figure 2.2. Female Participation in the Horticulture Workforce

Source: World Bank.

Note: 1. Due to the lack of statistical data, this percentage only refers to women as entrepreneurs and not as waged labor in production.

Gender Constraints

In addition to the general constraints on women's time, there are specific gender-intensified constraints that affect female involvement in horticulture. These differ according to the roles women play.

Waged Laborers

Upgrading into production, packing, and processing for most fruits and vegetables offers significant employment opportunities as waged labor for rural and urban women, both on large farms and in pack houses.²⁰ By providing salaried positions, these larger firms offer women a degree of empowerment, increase female bargaining power within the family, and enhance economic independence (Quisumbing

2003; Zhang et al. 2004). Given that female income is more likely to be directed to child nutrition, education, and health, this is expected to have positive outcomes for development.

However, women are constrained from fully benefiting from these opportunities. It is important to ensure that the growth of these horticultural exports does not come at the expense of female workers, particularly rural women who have limited alternatives. The key constraints regarding female participation in waged labor in large operations include:

²⁰ In some countries, such as Honduras, packing is done on the farm, while in others packing is done in rural areas. In Kenya, there are large packing facilities within the grounds of the airport.

- Different wages and employment conditions to men
- Flexible employment heightens uncertainty
- Sexual harassment by male supervisors
- Limited access to training

Many developing countries in the sector have established far-reaching legislative measures protecting the rights of women. However, these constraints often result from established values in the societies in which these supply chains are embedded.

Compensation and labor conditions may differ by gender in the industry: Maintaining a competitive position in the horticultural value chain means keeping costs low. As a result, firms tend to seek the cheapest labor available, and studies find gender discrimination in labor compensation and conditions (Dolan and Sorby 2003). First, men and women may receive different wages for the same work (Barrientos et al. 2001),²¹ although this appears to be easing in certain cases. Evidence from some countries shows that gender wage differences in this sector are lower than at the national level. For example, in Chile as a whole, men earn 26 percent more than women, but in horticulture for export, this difference among temporary labor decreases to 10.8 percent (Departamento de Economía Agraria 2009). Also, the widely adopted use of productivity wages (based, for example, on the number of trays packed or baskets of fruit harvested) tends to limit the gender element in compensation for the same job (Dolan and Sorby 2003). Second, although female labor is dominant in a key value-adding segment of the value chain—packing—and draws on years of food preparation experience and skills,²² wage differentials only partly reflect these skills. Female laborers earn more in the pack house than on the farm, yet male laborers have been found to receive higher wages for jobs that require strength rather than skill (Dolan 2004). Third, women are less likely than men to be permanent workers, and as seasonal labor, they have less legal protection. They typically work longer hours in poorer working conditions and may not have access to health care, including maternity leave, and other social benefits (Barrientos et al. 2001, 2003).

Flexible employment increases uncertainty for women: This constraint is present in the industry for two reasons. First, global buyers increasingly push risk related to rapidly changing prices and demand down the value chain to producer/exporters, who in turn minimize their exposure by reducing fixed costs and relying on an increasingly flexible labor force. Second, high seasonal tariffs in key markets reduce the competitiveness of the horticultural sector in developing countries during certain periods of the

year, resulting in seasonal slowdowns of production and packing in developing countries. As a result, many firms use a mix of temporary work arrangements along with a small core group of permanent employees. Permanent labor tends to be dominated by male employees, and it has been found that women largely bear the burden of this need for flexibility (Dolan 2004). The use of women as temporary labor tends to be widely accepted in developing countries, where despite high levels of female-headed households, female wages are generally considered complementary to the main wages of the male family bread winners. This perceived “flexible supply” of labor is attractive to many firms (Dolan and Sorby 2003).²³

It could be argued that the higher flexibility of female workers, combined with lower wages, improves competitiveness within the value chain. Although these flexibility constraints may have a negative impact on workers, scarce rural employment in developing countries for low-skill workers (Achterbosch et al. 2007) is likely to promote the flow of women to waged labor on large firms regardless of conditions. However, in some countries where there are employment options, seasonal work models can indeed impede the industry’s competitiveness, because the limited nature of the work is unattractive and the industry can face labor shortages (USAID and Macdeonia Ministry of Economy 2009). Furthermore, in the long term, costs are likely to increase due to high attrition, sick days, and shortage of labor

²¹ In India, for example, the average wage for seasonal work is 30 percent lower for women than for men in general and 20 percent lower for the same task, while in Mexico, wages are lower for women with little education than for men with the same level of education (World Bank 2008). However, this is in the broader agricultural sector and not only in horticultural products.

²² Labor in the sector is considered unskilled, given that horticulture hires both men and women with limited formal education (Fernandez-Stark et al. 2011). Limited recognition is given to skills developed through nonformal training or experience.

²³ This lack of stability in work arrangements is particularly complex for many female workers. First, as work is seasonal, workers do not know for certain in which months of the year work will be available. For women who depend on multiple seasonal jobs, this creates coordination challenges that may result in lost job opportunities. For female heads of household, who are the primary providers, this also creates significant difficulties for income smoothing throughout the year. Second, during the season, flexibility increases uncertainty for the women who may not know from one day to another if they will be working, or the hours they will work (Dolan 2004). Although this affects both men and women in part-time positions (Maertens and Swinnen 2009a), this constraint is intensified for women due to their reproductive responsibilities, such as childcare and preparation of family meals (Tanzania Plantation and Agricultural Workers Union 2011).

resulting from the burden placed on the predominantly female workforce.

Sexual harassment and discrimination by male supervisors: Vulnerable women may be subject to significant levels of sexual harassment, while discrimination against women often prevents promotion to better positions. Given the scarcity of job opportunities and limited labor mobility in some countries, sexual harassment often goes unreported (Tanzania Plantation and Agricultural Workers Union 2011). In addition, in many cases, women are unaware of their rights and accept this as “the way things are” (Ethical Trading Initiative 2011). Gender discrimination plays a central role in reinforcing the gender-bias in the assignment of jobs, and often prevents women from accessing higher-paying, more specialized jobs. This behavior can have a significant impact on productivity, which in turn reduces the competitiveness of producers on the global market.

Limited access to training: Because women are concentrated in the seasonal or temporary parts of the value chain, they have limited access to training. “Women often have less access to training than men, giving them less opportunity for skill development, promotion and the chance to upgrade their work status” (Barrientos et al. 2001: 8). One of the ways to test for this constraint is to analyze the proportion of women in supervisory or managerial positions. More women are typically found at the supervisory level than in management, and as such have less influence over decision making in the company. In Tanzania, for example, the industry has seen progress: 36 percent of managers and 58 percent of supervisors are females. However, director-level positions, where the majority of decisions are made, are dominated by men (Tanzania Plantation and Agricultural Workers Union 2011). Barrientos et al. (2001) note this lack of access is often justified by employers on the grounds that women have higher turnover and absentee rates than men, and thus workforce development investments are too risky and can lead to unnecessary increases in costs.²⁴ This lack of training may in turn limit women’s potential for advancement or participation in higher-paying activities, such as driving or machine operations.

There is growing evidence that a certain level of training for both men and women is essential to support upgrading in the horticultural sector (Fernandez-Stark et al. 2011a). Training in harvesting and post-harvest processes is associated with an important reduction in loss of produce (Neild et al. 2010), and thus can help improve net income and competitiveness for producers. In addition, training across multiple functions within the pack

house allows firms to reallocate labor and helps them respond to rapidly changing global demand and prices. Meeting supply demands of lead firms in this way can favorably position exporters in developing countries. Given the preponderance of women in this value-added segment of the chain, limiting training opportunities can hinder continued competitiveness and upgrading.

In conclusion, although reducing gender-intensified constraints can lead to improved productivity and competitiveness, many firms continue to support entrenched gender norms. This highlights the deep-rooted nature of discrimination between accepted female and male roles. Nonetheless, long-term cost-benefit analysis by firms has begun to shift this dynamic in countries such as Kenya and Chile, where there is a focus on improving conditions. This is partly due to the incorporation of socially responsible sourcing practices, and the adoption of corporate codes of conduct by large buyers (Maertens and Swinnen 2009a; World Bank 2003). There is growing evidence that women working for exporters directly engaged with the value chain’s lead firms have better work conditions and greater wage equality than those who work on family holdings or for smaller, independent outgrowers.

Unpaid Family Labor in Smallholder Production

Smallholder participation in the horticultural value chain is dominated by small-sized, family-owned plots in rural or periurban areas.²⁵ Crop production on smallholder plots is typically diversified, with a mix of cash crops, such as cotton and maize, as well as food crops and nontraditional high-value agricultural products, such as fruits and vegetables (Lastarria-Cornhiel 2006). Analysis of the division of labor on these plots reveals regional differences, and hidden, or unrecognized, labor contributions of older female family members. In Africa and Asia, women carry out a significant share of this productive work in addition to food production for the household. Smallholder plots depend significantly

²⁴ However, there is no clear evidence suggesting that female attrition is higher than male attrition in this sector. Indeed, Reynolds (2001) and Kritzing and Vorster (1998) note that female workers have higher attendance than men and stay longer periods of time with a company due to limited alternative job opportunities.

²⁵ This should be differentiated from “outgrowers.” While outgrowers may also be smallholders, in some cases they can be significantly sized operations, where multiple small plots are owned by one company or individual. That grower delivers the product to the exporter, who consolidates supply. Smallholders who participate in outgrower schemes, on the other hand, own only a small plot, usually under five hectares (Medlicott 2011).

on female labor for nontraditional, high-value agricultural products (Lastarria-Cornhiel 2006). In Latin America, men tend to be responsible for more of the production work on family plots, with women providing support by helping at harvest time and fulfilling their reproductive responsibilities. This unpaid labor is important in maintaining smallholders' low costs, and indeed may mask their true costs versus those of large farms. Due to these apparently lower costs, exporters are likely to continue purchasing from smallholder operations, perpetuating unpaid female work.

Women in the role of unpaid family labor are the most vulnerable, disempowered, and constrained segment in the global value chain. Although women may perform most of the farm work, in general, the male representatives of the household negotiate contracts, marketing, and sales and also hold the decision-making power and control over the use of income (Dolan 2005a; Lastarria-Cornhiel 2006). Women's on-farm responsibilities prevent the pursuit of off-farm work opportunities in the rest of the sector, and they have no access to independent income (Deere 2005).

However, this may slowly be changing, as many of the younger generation seek work off the family farm, either as waged labor in large production operations, or in fruit and vegetable pack houses, or out of agriculture altogether. For women who continue to work as unpaid family labor, there is an emerging gender struggle over land, labor, and income (Dolan 2005b). Increasingly, women are taking control of the land as men migrate out of agriculture (Chan 2010; World Bank 2009). Now in charge of family plots, the number of de facto female heads of household has grown, transforming unpaid family laborers into entrepreneurs.

Entrepreneurs

Although the smallholder or independent outgrower, regardless of gender, faces constraints to participation in the horticulture global value chain, opportunities exist for the cultivation of certain high-value crops, such as berries and chili peppers. This section focuses on constraints faced by female smallholders or entrepreneurs to both enter and upgrade in the value chain. These women can account for up to 30 or 40 percent of smallholders in the horticultural sector. They are slowly gaining recognition for the quality of their production in some developing countries, despite gender-intensified constraints fostered by traditional cultural and social norms that discourage female entrepreneurship in agriculture.²⁶ These include access to land, finance, education, training, information networks, and markets.

Access to land and finance: In many developing countries where property is handed down to male heirs, women have typically been excluded from ownership in land reform

programs and inheritance of property (Deere 2005; Lastarria-Cornhiel 2006). Limited access to land ownership is a well-known and commonly cited constraint in gendered analyses of agriculture (Lastarria-Cornhiel 2006; USAID 2009a). One report notes that “upholding women’s right to own property is the single biggest investment in boosting women’s participation in agriculture for export” (ITC 2007: 36). In the horticultural sector in particular, some outgrower programs include land title as a requisite for participation (Chan 2010), creating an unassailable barrier for female entry.²⁷ On the other hand, in many countries women are now able to rent or purchase land on which they can produce for the fruit and vegetable market, and product quality is used to govern entry rather than formal land titles (Lastarria-Cornhiel 2006).

Access to finance is increasingly cited as a more prominent restraining factor for participation in higher-value agricultural practice than access to land (Nation 2009). This is particularly true when the need to comply with multiple standards from lead firms increases production costs. Land ownership is often linked to access to finance, because creditors may require land as collateral for loans due to the high risk of agriculture (Fletschner 2009). There is an ongoing debate regarding this mechanism as an inhibitor of access. Deininger and Feder (2009) find no significant easing of credit for either males or females based on formalization of land tenure. Furthermore, Reardon et al. (2009: 1,722) note that nonland assets are the “threshold investments for inclusion in the value chain.” Indeed, in Chile, smallholders in the 1990s were unable to sustain their position in certain fruit exports, because they were unable to support the debt levels required (Kay 2002, cited in Lastarria-Cornhiel 2006).

The challenges of access to finance in the already credit-constrained horticultural sector²⁸ are intensified for women due to their limited access to information about credit availability, and, in more extreme cases, by societal

²⁶ Census data suggest that one in five farms in the developing world is headed by a female (FAO 2003). It is difficult to establish exact figures for smallholder participation. Hortico, which was Zimbabwe’s largest producer at the turn of the century, was well known for high female participation among its outgrowers, who made up 60 percent of the producers. Homegrown, Kenya’s leading exporter today, requires significant female producer participation (in some cases, at least one third) in its outgrower groups (Chan 2010). Outgrowers of Honduras’ largest vegetable exporter are 30 percent women, and 24 percent of raspberry smallholder producers in Chile are female (Caro 2009).

²⁷ This also serves as a constraint to men in the industry, especially in countries where historical disputes over land ownership hinder the recognition of title.

²⁸ It is well known that highly imperfect or missing credit markets severely restrain the agricultural sector (Maertens 2009).

norms that require a woman to be authorized or represented by her husband or a male relative to obtain credit (Fletschner 2009; Fletschner and Kenney 2011). These limitations often translate into a higher cost of credit for female producers, inhibiting them from directing as much surplus earnings as men into investments for upgrading, such as irrigation equipment needed to ensure consistent supply for supermarkets.

Access to education and training: Due to the importance of food safety standards, consistency, and quality in the production of fruits and vegetables for export, technical assistance and training are essential for new producers to transition from ad hoc production for at-home consumption to production for foreign markets (Fernandez-Stark et al. 2011a). However, several factors constrain female access to education and training. First, social constructs of men's work as productive and the assignment of women to caregiver roles continue to favor educational investment in sons over daughters (United Nations 2010; USAID 2009a). As a result, males typically acquire more human capital than women. Second, even where training or education is available to females,²⁹ they face notable constraints to participation. These include social norms that prevent them from interacting with men beyond their immediate families or involve discomfort in doing so, which tends to reduce female participation in training programs (Aina 2006). The location and scheduling of training programs may also limit female participation. Certain social restrictions may exist to female use of public transportation, preventing them from reaching the location, while reproductive responsibilities may prevent them from leaving their home at the time of the training (Fletschner and Kenney 2011). Similar restrictions can also limit women's ability to work with extension agents, who are usually male (Fletschner and Kenney 2011). Preventing women from interacting with them can limit their ability to improve productivity and upgrade.³⁰ It is estimated that women in general receive only 5 percent of extension services in agriculture (FAO 2003).

Access to networks, information, and markets: Barham and Chitemi (2009) note that female farmers groups are generally less successful than male associations in seeking out new information and markets. As a result, contract farming is typically male controlled (Dolan 2001; Maertens and Swinnen 2009b). Gender integration in formal associations can be limited by social constructs that prevent women from associating with nonrelated males, while gender-specific informal gathering places may hinder female access. This can restrict female entrepreneurs' ability to gather information regarding financing opportunities (Fletschner and Kenney

2011; USAID 2009a), new crop varieties and production technology, and potential markets (USAID 2009a).

These constraints can significantly undermine female entry to, and upgrading in, the value chain. In the long term, due to male migration out of agriculture, this may reduce smallholder participation in certain product segments.

Cultivation and harvesting of gender-biased crops can, nonetheless, present upgrading opportunities for both men and women. Gender-based roles favor women for working with products that require care, gentle handling, and attention to detail. Products that are heavy and easy to manipulate, such as bananas, are harvested by men, while those that are less heavy and/or more fragile, such as berries, tend to be harvested by women (Caro 2009). One characteristic of fragile crops is that they can be produced in small plots, giving women an opportunity to start their own business and move up the value chain, upgrading from simple production to processing. Numerous best practices worldwide have emerged in which women are successful entrepreneurs working with fragile crops (AVINA 2011; Instituto de Investigaciones Agropecuarias-Gobierno de Chile 2011). However, initial external support is necessary to overcome the basic constraints that women face, such as access to land, credit, and training.

Gender Impact of Economic Upgrading

In the previous section, the impacts of gender-intensified constraints on upgrading were discussed. This section highlights the impact of economic upgrading on gender relations. Exporters in developing countries make decisions regarding upgrading and how to meet the demands of buyers in global value chains based on a broader context of competitiveness, trade promotion, and regulation. Understanding the gender impact of these upgrading decisions is as important for policy interventions as comprehending how gender constraints can mute upgrading responses.

Table 2.3 summarizes the implications of upgrading processes along different dimensions of labor and gender relations. Two key labor implications correspond to most upgrading trajectories: an increase in employment and in the skill content of the work. Typically, gender impacts of these implications slightly favor female employment.

²⁹ Doss and Morris (2001) note that gender bias may be even more deeply embedded in the provision of extension services, which focus on producers who may have high potential and who already have access to land, credit, and education.

³⁰ It is often recommended that female extension agents be trained to reduce this constraint. However, it should be noted that in some cases (as in Honduras), female farmers were displeased with female agents; they considered their advice less credible than that of their male counterparts.

Table 2.3. Select Upgrading Trajectories in the Horticulture GVC: Labor Implications and Gender Impact

Segment of GVC	Type of upgrading	Description	Labor implications	Gender impact
PRODUCTION	Functional upgrading	Shift from cereals to high value agriculture	<ul style="list-style-type: none"> Increased employment 	<ul style="list-style-type: none"> Favors increased employment and skills in both male and female labor
	Product upgrading	Product diversification into multiple different crops	<ul style="list-style-type: none"> Multiple growing seasons in one year increases the length of employment Training opportunities with increased complexity 	<ul style="list-style-type: none"> Favors increase in both male and female labor Type of product determines which gender benefits more
		Upgrading into higher value products (for example, change from potato to sweet potato)	<ul style="list-style-type: none"> Increased employment (tend to be more labor intensive) 	<ul style="list-style-type: none"> Higher-value products tend to be lighter and more fragile, leading to increased female employment in crop management and harvesting
	Process upgrading	Installation of greenhouse technology	<ul style="list-style-type: none"> Multiple growing seasons in one year increases the length of employment 	<ul style="list-style-type: none"> Products that can be grown in greenhouses are typically higher value (to warrant the investment) and thus tend to favor female employment
		Installation of drip irrigation technology	<ul style="list-style-type: none"> Smaller more highly trained irrigation team 	<ul style="list-style-type: none"> Decrease in male irrigation workers, favors access to women as strength is no longer required
		Use of small plots for production to increase efficiency and reduce risks (for example, smallholders for jalapeno production)	<ul style="list-style-type: none"> Outgrowers have lower labor standards (more costly to meet them) 	<ul style="list-style-type: none"> Opportunities for female outgrowers based on the product
		Large plot production (economies of scale)	<ul style="list-style-type: none"> Increased employment 	<ul style="list-style-type: none"> Favors increase in both male and female labor

(Continued on next page)

Table 2.3. Select Upgrading Trajectories in the Horticulture GVC: Labor Implications and Gender Impact (*continued*)

Segment of GVC	Type of upgrading	Description	Labor implications	Gender impact
PACKING and STORAGE	Functional upgrading	Upgrading from only production into packing	<ul style="list-style-type: none"> Increased employment in new functions of grading, washing, packing, and so forth 	<ul style="list-style-type: none"> Favors increase specifically in female labor
	Product upgrading	Product diversification into multiple different crops	<ul style="list-style-type: none"> Multiple growing seasons in one year increases the length of employment Training opportunities with increased complexity 	<ul style="list-style-type: none"> Favors increase in female labor Tendency to longer employment (albeit temporary)
	Process upgrading	Additional packing processes are added, such as chopping, trimming, and mixing	<ul style="list-style-type: none"> Increased employment in new functions in chopping, trimming, and mixing Teams can be trained in multiple activities allowing for flexible response to changing demand 	<ul style="list-style-type: none"> Favors female employment in most countries
			Improvement of management and supervisor quality	<ul style="list-style-type: none"> Improvement in work environment
PROCESSING	Functional upgrading	Processing of produce, freezing, canning, pickling and so forth	<ul style="list-style-type: none"> Increased employment, although increasingly mechanized 	<ul style="list-style-type: none"> Favors both male and female employment in urban areas Accompanying expansion of production favors male employment in rural areas

Source: World Bank.

Functional upgrading from cereal production into the production of fruits and vegetables increases employment in production by an estimated 5:1 ratio (Joshi et al. 2004; World Bank 2009). As seen in the gender composition of the value chain, this production is dominated by men. Product and process upgrading, however, such as the installation of greenhouses and drip irrigation, may have a negative impact on male employment. Greenhouse production tends to favor fe-

male employment over male, because the products tend to be more fragile. Drip irrigation, on the other hand, is more efficient than overhead irrigation, as it requires remarkably few people to manage it rather than large teams to move heavy pipes and equipment. This can also provide opportunities for women to enter irrigation and pesticide application jobs, as the role no longer requires strength and the application of pesticides is not as dangerous.

Functional, process, and product upgrading in the packing segment typically favor female over male employment. For example, product diversification in this stage of the value chain is particularly positive for women as it extends the packing season and decreases the flexible nature of the work, while any improvements in the sophistication of the packed product (chopped, mixed, and so forth) increases total female employment. Expansion of the packing segment also offers women a higher-paid employment alternative to farm labor.

Upgrading into the processing segment is typically accompanied by increased production, which favors male employment, although processing itself appears to be more gender neutral (see figure 2.2). Social norms are reflected at this stage: men tend to operate machines and women focus on selection of produce and packaging, with a corresponding wage difference.

Country Case Study: Honduras

Honduras is a small developing country that highlights the importance of unpacking the gender dynamics of the production and export of fruits and vegetables within the value

chain. Honduras was selected for analysis based on its relative success in incorporating multiple production models into the sector. Land distribution programs in Honduras in the 1960s subdivided most viable arable land into smallholder plots and limited their sale until 1992. Although large producers in the banana sector leveraged their power and influence to purchase and consolidate land, in many regions of Honduras there continues to be small-scale land distribution that limits production based on economies of scale. In the 1990s, new production models for export emerged in products using outgrower schemes that had proven successful in other developing countries. These schemes have successfully leveraged small-scale land distribution and created valuable opportunities for women in production and packaging as both waged labor and entrepreneurs.

The Horticulture Industry and Economic Upgrading in Honduras

The industry is divided into three well-marked subsectors: the production of bananas and pineapples by two multinational firms, the production of melons and watermelons by a small number of locally owned firms, and vegetable production using a variety of production models. The contributions

Table 2.4. Breakdown of the Fruit and Vegetable Sector in Honduras

Sector	Industrial organization	Export value (US\$ million) ^a				Stages of the value chain
		2006	2007	2008	2009	
Bananas Pineapples	Own production of two multinational corporations plus limited outgrowers	134.6 ^b 45.4	143.0 45.4	159.2 35.6	134.2 33.3	<ul style="list-style-type: none"> • Production • Packing (bulk): grading, washing, and packing in 5 to 20 kilogram boxes • Own brand
Melon and watermelons	Three large domestically owned firms, in-house production, plus limited output from smaller firms	45.1	45.0	41.1	36.0	<ul style="list-style-type: none"> • Production • Packing (bulk): grading, washing, and packing in 5 to 20 kilogram boxes depending on destination market • Own brand
Vegetables	Multiple firms (<50), producer-exporters and outgrowers	56.6	48.7	65.9	63.6	<ul style="list-style-type: none"> • Production • Packing (bulk): grading, washing, and packing in 5 to 20kg boxes • Own brands and client brands

Source: CGGC based on data from the Federacion de Agroexportadores de Honduras (<http://www.fpxhn.net/>).

Note: ^a Data from 2009 shows a slight decline in exports. This is more likely due to the 2009–10 global economic crisis than factors within the industry in Honduras.

^b The figures in the upper line correspond to banana exports; those in the lower line correspond to pineapple exports.

of these three distinct sectors to the country's exports are noted in Table 2.4. Produce is destined primarily for global buyers in the United States, including supermarkets and processors. Regional buyers from El Salvador also absorb a significant portion of the country's vegetables.

Bananas and pineapples have been shipped from Honduras to various world locations for at least a century, and they continue to be strong exports for the country. Although they have regained territory lost due to Hurricane Mitch, which devastated Honduras's agriculture in 1998, export growth is limited and fluctuates. Banana and pineapple production globally has a distinct value chain organization, dominated by an exceedingly small number of large multinational firms and with high barriers to entry. Lee et al. (2010) classify this chain as a bilateral oligopoly. The production and export models of these products in Honduras reflect that global supply is highly concentrated. Exports are dominated by two large multinational firms that have been in the country for approximately 100 years. These firms earned the country a reputation as "the banana republic." The majority of their produce comes from company-owned farms, although large, independent outgrowers participate.

Melon cultivation was based traditionally on smallholders, although today it is controlled by a small number of locally owned firms that have consolidated. Melon production was initiated by large producers at the beginning of the 1980s, but smallholders were also attracted to this sector as a substitute for cotton. By the end of the decade, there were approximately 1,000 smallholder producers in the sector. However, consolidation had begun because small producers were unable to sustain the quality and quantity requirements. Exports declined in 2008 following a ban imposed on a leading exporter by the U.S. Department of Agriculture due to a sanitary problem with melons entering the United States.³¹ This ban forced the exporters to explore new markets. As a result, they have successfully diversified into Europe and Canada.

The export-oriented vegetable sector emerged in the 1990s, with a focus on catering to demand from the growing population of Asian origin living in the United States (Imbruce 2008). From its early stages, export production has been characterized by exporter-owned farms complemented by a large number of smallholders. Local export firms together with a few foreign-owned operations control the packing segment of the vegetable sector. These companies leverage the smaller local outgrowers, primarily through the use of resource-based contracts in which the exporter provides producers with some combination of inputs, credit, technical assistance, and guaranteed purchase price.

Exports are dominated by Asian vegetables, such as okra and eggplant. Other vegetables such as tomatoes form parts of different export chains. These are based on regional exports, principally to El Salvador. Buyers typically purchase the entire harvest from a smallholder at the farm gate and provide transport to wholesale markets in the neighboring country. These buyers may also provide credit and technical assistance informally to the producer.

The key upgrading trajectories in the horticulture sector of Honduras are as follows:

- Country-level upgrading in the past two decades has been focused principally on product diversification with the emergence of the vegetable production sector, rather than functional upgrading.
- Limited value-added processes have been included in the Honduran value chain, but all three subsectors continue to ship primarily in bulk.³² Attempts to attract value added processes to the country so far have been stymied by political and macroeconomic instability.
- Standards (process upgrading) have been widely adopted by the industry to meet client and target market demands; all fruit exporters and several vegetable exporters have been certified according to United States Food and Drug Administration, GlobalGAP, and Hazard Analysis & Critical Control Points (HACCP) standards.³³ In addition, market diversification has helped reduce producer vulnerability and lengthen their operating seasons from a few months to almost year-round production. Institutional support for phytosanitary standards is weak but improving.
- Product upgrading through diversification of vegetables, including the incorporation of higher-value vegetables, has had significant labor implications. Producers are provided a buffer against rapidly changing global prices, while the extension of the production and packing cycle requires labor on nearly a year-round basis.

³¹ Increased phytosanitary requirements have in fact excluded smallholder production of melons for export in Mexico as well. Lee et al. (2010) note that these providers withdrew from the U.S. market in 2002 following a series of salmonella outbreaks.

³² Most operations ship in cardboard boxes of between 5 and 20 kilograms. These boxes may be exported with either the exporter's brand or that of the client.

³³ GlobalGAP: www.globalgap.org/; HACCP: <http://www.fao.org/docrep/005/Y1579E/y1579e03.htm#fnB1>.

³⁴ One interview respondent noted, "men [in Honduras] are born with a machete in their hand and boots on their feet."

Gender Dimensions of Honduras' Horticulture Industry

Within Honduras, traditional social norms place a greater burden for household and caregiver roles on women than on men, and women are expected to carry out all reproductive activities within the household, such as cooking, cleaning, and caring for children. On average, women spend 3.35 hours a day on these activities compared to 37 minutes by men (Instituto Nacional de Estadística Honduras 2010). Like many countries in Latin America, agriculture has traditionally been more male dominated than in Asia and Sub-Saharan Africa (Deere 2005). Boys are encouraged to spend time in the fields with their fathers, while daughters accompany their mothers doing household chores.³⁴ Domestic fruit and vegetable production, which draws primarily on traditional smallholder supply, reflects this social divide: men take on the principal roles in production, determining what crops will be planted and how the income will be allocated, whereas women primarily play supportive roles, occasionally helping with the harvest.³⁵

These deeply rooted cultural biases towards male versus female work have provided new opportunities for women to enter the agricultural sector. Young women, principally between the ages of 20 and 25, have been hired into different roles, most notably in the packing segment of the value chain, where the industry draws on their socially developed skills in food preparation to select, wash, and pack fresh produce.³⁶ This increase in female employment has been further fostered by an increase in the percentage of female-headed households, who have taken on responsibility for providing for their families as a result of significant male migration to urban areas and emigration to the United States.

Declining remittances from abroad have forced these women into the labor market.³⁷ While overall female participation in the labor force is 37.4 percent,³⁸ it is 60 percent for female heads of household (Weller 2009), and alternative job opportunities to the horticulture sector in rural and semi-urban areas are extremely limited. Female farmers are also taking on a role in the export industry, with growing numbers of women participating alongside males in outgrower schemes.

Table 2.5 provides an overview of the gender-based division of labor in Honduras' fruit and vegetable export sector on both large farms and in smallholder operations. Notably, jobs that are dominated by women—nursery work, transplanting, quality control, washing, grading and packing—all require the worker to have the following skills: attention to detail, careful handling of the product, and the ability to identify defects. Jobs that are dominated by men involve operating machinery, such

as transportation and logistics. In general, interviews revealed a remarkably strong perception that male jobs were those that required significant strength, and female jobs required care and attention. Harvesting jobs, for example, are done by both men and women, depending on the product. Harvesting of bananas is done by men, while harvesting of peppers is done by women. Men typically hold management roles, although women featured prominently in supervisory roles,³⁹ particularly in functions employing predominantly women. This gendered division of labor appears to be consistent, regardless of the ownership of the production or packing operation.

As in other countries around the world, there are constraints to participation in this industry that differ according to the roles women play. Female family members providing unpaid labor on family-owned plots are the most vulnerable participants. There is perhaps greater equality with respect to female participation as outgrowers in Honduras than in many other developing countries, which may be a reflection of the comparably smaller overall gender gap in the country (Hausmann et al. 2010). The following section examines these constraints by role.

Waged Labor

Despite scarce job opportunities in rural areas, there is a shortage of labor. There is widespread reluctance to work in agriculture, and in particular, in the Comayagua region where the bulk of vegetable production is located (Imbruce 2008).⁴⁰ Interviews revealed that agriculture in general is perceived as an unskilled, lower-class activity that is only for the uneducated. Once a person has a high school education, they do not consider agriculture an acceptable field to work in and prefer to remain unemployed. Combined

³⁵ The domestic fruit and vegetable market in Honduras is dominated by wholesaler markets. Although two large supermarket chains are beginning to increase their market share, they only control 20 percent of consumption. Thus, very few value-added processes are included in this chain, and the product is loaded into large sacks or boxes and taken to the market in bulk.

³⁶ Women are also drawn into the value chain to work as labor during harvest.

³⁷ While 41 percent of rural households receive remittances from abroad, the global economic crisis resulted in these declining from 12.7 percent of household income in 2006 to 6.7 percent in 2010 (Instituto Nacional de Estadística Honduras, 2011a).

³⁸ This is relatively low for Latin America, where female participation in the workforce averaged 50.1 percent in 2009 (ILO, 2009).

³⁹ One exporter only has female supervisors, which corresponds to the fact that his workforce is 80 percent female.

⁴⁰ Field research indicated that returnees are not willing to work in the plants, while the younger men in the family do not seek out work and expect their parents to continue to provide for them.

Table 2.5. Gender Map of Honduras Global Fruit and Vegetable Value Chain

Position	Training/experience	Gender (proportion of women)
Production		
General manager	Oversees and manages all operations, may also own the production operations.	○
Agronomist	Determines when, what, and how much should be planted in different areas, including crop rotation, mono vs. diversified cultivation, pesticide application, and so forth.	○
Nursery worker	Seedling preparation.	●
Transplanter	Transplants the seedling from the nursery into prepared bed in the fields or greenhouses	●
Land preparation	Responsible for preparation of the vegetable beds, may include plowing and similar tasks.	○
Weeder	Responsible for removing unwanted plants from the beds.	◐
Pesticide handler	Pesticide handlers, sprayers, and applicators mix pesticides, herbicides, fungicides, or insecticides and apply them through sprays, dusts, or vapors. Pesticide handlers must have thorough knowledge of chemicals they are handling as well as of application and disposal procedures.	○
Irrigation technician	Install, maintain, alter, repair, and service irrigation system.	○
Harvest worker	Manually plant, cultivate, and harvest fresh fruits and vegetables. Duties may include tilling soil and applying fertilizers; transplanting, weeding, thinning, or pruning crops; cleaning, packing, and loading harvested products.	●
Harvest foreman	Responsible for supervising workers, crop production and protection, operation of machinery and equipment. This is a permanent position, usually requiring a minimum of three years experience in the fresh fruits and vegetables sector.	◐
Quality control	Work in the field and are responsible for the quality of the harvested crop. Random samples are taken from each bin and checked for quality, size, color, and maturity.	●
Tractor/truck operator	Responsible for bin placement for pickers and removal of bins ready to be stacked in trucks. Must be able to operate machinery safely, and without damaging the product.	○
Packing and storage		
Washing	Washes produce to remove dirt.	●
Grading	Separates the produce by quality into different grades appropriate for different markets or rejects.	●
Packing worker	Fills trays, wraps fruit, and packs boxes and stacks packed boxes. Looks for defects in the fruit and make sure the packed product is well presented.	●

(Continued on next page)

Table 2.5. Gender Map of Honduras Global Fruit and Vegetable Value Chain (*continued*)

Position	Training/experience	Gender (proportion of women)
Labelers	Labels packed fruit for shipment. Using computer controlled equipment they ensure the traceability of packed fruit to meet end market requirements.	●
Forklift operator	May work in the field or pack house, loading bins of harvested fruit on and off trucks and placing them in shade houses or cold storage units. Operators may also be responsible for labeling bins to ensure traceability.	○
Transport driver	Transport fresh fruits and vegetables between fields and pack houses and shippers. Delivers product safely and in good condition. May need heavy truck license. Paperwork is involved during delivery and dispatch.	○
Managers (line/shift)	Line managers ensure the quality of the line of fruit being processed complies with industry standards. Shift managers are responsible for workflow during the period of their shift. They solve workflow problems by people management, and usually liaise with the line manager.	◐
Cold storage operator	Manages and operates the cold storage facilities where produce is chilled and stored prior to shipping.	○
Inspector	Inspectors usually work at port of export, monitoring shipments to make sure they meet international standards. This position can require export certifications.	○
Packing manager	Responsible for the day-to-day running of the pack house including staff management, budgeting, administration, and planning.	◐

Source: CGGC.

High ● Medium ◐ Low ○

with product and market diversification, this has resulted in increased demand and competition between exporters for staff, which in turn has reduced gender constraints.

First, **compensation** has been switched to a productivity wage, where employees are paid based on how many boxes they pack or canisters they fill during harvest. As a result, wage compensation within each job is increasingly gender neutral. Where labor supply is more abundant, however, women continue to be paid less than men. The scarcity of job opportunities in those areas limits employee and union complaints in order to maintain job security.

Second, a **small proportion of the workforce is employed permanently** despite legislation requiring employee status to change to permanent after 90 days, and the increased social protection required by law is poorly enforced.⁴¹ This flexibility is the result of firms seeking low costs to remain competitive. Operations with year-round production, however, maintain employment throughout

the year, even though employees legally have “temporary” status. Certain companies in an effort to retain staff have extended social benefits to all employees (both permanent and temporary), which eases access to health care, as well as providing paid maternity leave for all female employees. This has paid off, since attrition rates are low and attracting new employees has been easier.

In general, employers’ awareness is growing of the difficulties facing female labor. This is notable among firms with foreign ownership, or with European exports, or firms looking to expand into Europe. One exporter provides an on-property clinic employees can use for them-

⁴¹ In 2009, following a political crisis and change of power in Honduras, several changes were made to labor legislation. These included increasing the minimum wage in rural areas by 40 percent and increasing severance packages for retrenched employees. These costs were prohibitive for most firms in the sector, and there appeared to be a tacit agreement to maintain the status quo from prior to the change of power (Cordero 2009).

selves and their children, which has lowered female absenteeism.⁴² While the law requires childcare facilities in operations with large numbers of female employees, no companies provide this. Several exporters, however, indicated their intention to do so in the near future to help attract and retain labor. There are no public childcare facilities, and many single mothers have limited options for childcare during work hours.

Third, **access to training and education** for women is notable, with higher female than male participation in basic education, although in rural areas, both male and female participation in secondary education is low (below 25 percent) (FAO 2008). In 2007, 33 percent of participants in agricultural programs provided by the Instituto Nacional de Formación Profesional, which provides training for industries in Honduras, were female (FAO 2008: 46). Female participation in agronomy studies at the university level is also relatively high. In 2010, female students accounted for 25 percent of the student body at Zamorano University, a leading agricultural college in the region, and 35 percent of those at Universidad Nacional de Agricultura. However, interviewees noted that there was a general oversupply of agronomists in the country, and female graduates are less likely to work as practicing agronomists.

Currently, the export industry in vegetable production offers limited value-added services in the packing segment of the value chain, and these services are already facing challenges in attraction and retention of workers. Process upgrading into more sophisticated packaging will require a further increase in employment. National employment in agriculture has remained relatively constant over the past 10 years, accounting for approximately one in three employees despite the growth of the industry (Instituto Nacional de Estadística Honduras 2011b). This, combined with any improvements in access to education in the rural areas, is likely to maintain pressure on the labor supply, particularly in farming centers such as Comayagua. Continued efforts will be required to promote employment in the sector, which have the potential to translate into improved conditions for female workers.

Unpaid Family Labor

As in other developing countries, women play a vital role as farm labor in Honduras, particularly with respect to supply for the domestic market. However, they have little access to either income or decision-making processes with respect to the family operation, despite recognition that the land is a family-owned asset. Women assist in some vegetable production and harvesting roles, but are primarily responsible for growing produce for family consumption.

Integrated family approaches to incorporating these smallholders into the value chain have been promoted with various degrees of success by NGOs such as the Fundación para el Desarrollo Empresarial Rural (FUNDER), which works with the family unit rather than with only male producers. Nonetheless, these women represent the most vulnerable labor in the industry and are largely unrecognized for their contributions.

Entrepreneurs

Traditionally, horticultural production for the export market was consolidated with limited access for outgrower production, and smaller production was focused almost exclusively on the domestic and regional markets. The dynamic expansion of the vegetable industry, however, offered opportunities for access to both new product and geographical markets. Export production continues to be dominated by men; nevertheless, there is an emerging trend of older female producers accessing the global value chain. Constraints to entry and upgrading are intense for both genders.

Access to land and finance in Honduras reflects a similar pattern to other developing countries. Land reform in the 1960s favored males, with just 3 percent of land allocation going to females (FAO 2008: 67). In addition, land bequests traditionally favored male heirs over females.⁴³ Today, low female ownership (28 percent) (FAO 2008: 68) continues to reflect this tendency, although this is partly the result of stagnation in the land markets, which is a legacy of prohibition of redistributed land prior to Agrarian Reform laws in 1992. Many producers, both men and women, thus rent the land on which they cultivate their crops, and the determining factor for access to land has become financial rather than institutional. In many countries, this would place women at a significant disadvantage over men, as banks often require land as collateral to secure loans. However, the credit market in Honduras is remarkably tight, and access to financing for high-risk agricultural projects, with or without property and regardless of gender, is severely restricted. FAO (2008) reports women are discriminated against in the loan programs available for smallholders, noting that 95 percent of loans go to men. However, efforts are being made to realign funding. In 2011, 25 percent of funds provided by

⁴² In some cases, women will leave their oldest daughter to care for their younger siblings. While some fear that this will impact female participation in education, low secondary school participation data suggests that these girls are unlikely to be in school anyway.

⁴³ Twenty-four percent of land that changed ownership between 1983 and 2004 was bought by women (FAO 2008).

a program put together by a leading supermarket and the FUNDER rural development NGO were assigned to female run value-added activities.

Investments for horticulture production thus must come from alternative sources. These include direct financing from global buyers as well as resource-provision contracts that include financial support, in addition to inputs and technical assistance. This is especially true for produce with limited local markets, such as okra or eggplant. One large exporter provides both inputs and credit as part of this contract and has highlighted the advantages of working with female producers. For example, they typically have negligible late payments compared with men. This exporter has increased female producer participation to 30 percent over the past 15 years and plans to continue the trend.

Access to education and training for the female agricultural entrepreneur has increased. In addition to improved access for females in formal education, gender strategies have been incorporated into many technical assistance programs (provided principally by foreign NGOs) across the country since the mid 2000s. In general, training sessions are designed to maximize female participation; for example, they may be scheduled at times when women do not have reproductive responsibilities, or carried out on the property of a female producer.

Networking opportunities and access to markets within the Honduran horticultural industry are to some degree inhibited by a lack of willingness to organize. Several exporters noted that they negotiate with each outgrower individually, leading to high transaction costs. Exporters indicated that attempts to help facilitate coordination among outgrowers were unsuccessful. One NGO noted that it had taken them eight years to get one community to organize and work together. The industry association claimed that it had been “tremendously difficult” to get a group of exporters to agree to collective bargaining with transportation companies, even though this directly affected their bottom line. Many of the interviewees indicated this was due to “cultural” reasons, although Hellin et al. (2007) believe this is more likely due to poor business administration skills. A higher degree of organization was observed amongst women, who appear to be more enthusiastic networkers and actively sought out information (Pacheco 2011). Women’s traditional roles in the community may thus be a significant driver for networking in this sector. Furthermore, women have been targeted to supply niche markets, particularly in Europe, which seek out female groups around the world with whom to work; this has been especially successful in coffee production.

Policy Recommendations

The analysis presented in this chapter indicates that gender-intensified constraints in the horticulture GVC affect the sector’s development and economic upgrading potential in developing countries. Lately, several institutions, such as governments, the private sector, industry associations, NGOs, and international organizations, have begun to address these constraints more actively. In this section, we outline policy recommendations for a gendered approach to the horticulture value chain and report on best practices to minimize gender constraints. The goal of these policies is to further economic upgrading and secure women’s access to the benefits, including increasing female participation in the paid labor force and the recognition of actual, rather than perceived, skill. Policy recommendations are related to women’s roles in the value chain: women as waged labor, women as entrepreneurs, and women as unpaid labor.

General Policy Recommendations

Three general issues must be understood to design effective, gender-sensitive policies for the promotion of horticultural exports. **First**, one of the most influential gender constraints to adequate policy development is the **misconception of male versus female roles in agriculture**. Generally, agriculture is thought of as a male domain and “development policies continue to wrongly assume that farmers are men” (World Bank 2008: 79). Indeed, the notion of the “feminization of agriculture” is misleading. While it is empirically difficult to determine the exact percentage of agricultural work done by women, 79 percent of women in developing countries report agriculture as their primary economic activity (Doss 2011). Linking awareness of this fact to policy formulation can be a powerful driver, influencing measures to overcome constraints facing women and creating a positive domino effect. Women are active stakeholders in horticultural. Thus, any action taken with respect to the industry will affect them, as in turn, general gender policies will affect the industry’s competitiveness.

Second, understanding the gendered composition of the value chain is crucial if trade promotion policy is to be effective and linked with development goals and poverty alleviation. Because female participation is concentrated in higher-value segments of the chain, **developed countries’ barriers** to higher-value products can have an immense impact on women’s employment opportunities by limiting upgrading. Preferential trade agreements can be implemented to overcome these barriers, which principally affect vulnerable populations in poor countries. Some of these agreements that can be leveraged to cover

Box 2.1 ■ Resolving Work-Life Balance for Female Participation in the Fruit Sector

The Cape Women's Forum in South Africa is a powerful women's association that promotes a gendered approach to increasing productivity in the country's fruit industry. The organization was founded in 1991 by Unifruco, an international fruit marketing agency. Originally, it was for white farmers' wives and was known as Friends of the Fruit Industry. However, the women soon took ownership of the association, rejecting the implication that their roles were secondary supporting roles to their husbands and renaming it the Cape Women's Forum. By 1997, the organization had become multiracial and represented over 20,000 female workers in the industry. In 2006, the association was certified as a training institution for the industry. It provides courses for both men and women on work-life balance, positive self-image, respect in relationships, and health care. It also provides technical skills training for rural women in business management and leadership skills. Key contributions of the organization have been in providing training programs for farm health and for childcare workers who support families of farm workers, which help alleviate the challenges women face in their caregiver roles in the family. The Cape Women's Forum coordinates with other organizations to lobby the government on agricultural policy, and Woolworths S.A., the leading South African supermarket chain, requires all suppliers to be members.

Sources: Cape Women's Forum 2011; Kritzinger and Vorster 1998.

higher-value products include the Generalized System of Preferences (GSP), the African Growth and Opportunity Act (AGOA), the Andean Trade Promotion and Drug Eradication Act (ATPDEA), and the Caribbean Basin Initiative/Caribbean Basin Trade Partnership (CBI/CBTPA) in the United States (Women Thrive Worldwide 2011). In addition, it is necessary to educate farmers in developing countries—particularly women, who usually have less access to information—regarding how to utilize preferential trade regimes to provide capacity-building assistance.

Third, gender-based policies that aim to reduce the burden of **reproductive responsibilities** are required to free up women's time to participate in productive activities, whether as waged labor on the family farm or as entrepreneurs. Shifting the social division of home labor is a challenge that can take generations to change. It must be addressed over time by fostering gender equality through the education system. These responsibilities can be eased more quickly, however, by addressing inadequate rural infrastructure, such as access to water, transportation, electricity, and other basic household requirements, as well as childcare facilities. These programs can be taken on by several different stakeholders in the value chain. Box 2.1 provides an example of a women's association in South Africa actively engaging the private sector to incorporate measures to ease time constraints for women.

The following section covers policy recommendations and best practices for overcoming the constraints to participation of women. These initiatives are focused on increasing and improving female participation to bring them to the level of their male counterparts with the goal of advancing the sector's productivity and competitiveness in developing countries.

Waged Labor: Policy Recommendations

Mitigating constraints facing waged labor is a challenge for policy makers, because competitiveness of the horticulture industry may depend on exploiting low female wages. In most countries, attempts to ease these constraints have already been addressed by national legislation promoting equal access to compensation and labor conditions. However, where this legislation is highly protective, it has harmed the industry, as occurred in the Colombia cut-flowers sector, where increased social protection hurt employment (Dolan and Sorby 2003). In Honduras, significant increases in minimum wage requirements and protection legislated in 2009 would have crippled the horticulture industry and thus were ignored by both the sector and government alike.

Since the horticulture value chain is driven by buyers, these firms have immense influence in the policy arena, an area in which government accomplishments have been limited. It could be argued that by controlling access to the market, private standards can be more powerful and enforceable than laws. Usually forced by consumers and pressure groups to be more socially responsible, lead firms have established global codes of conduct to support **wage equality and better labor conditions**. They can play a pivotal role in developing understanding amongst exporters of the business case behind reducing gender constraints. At a minimum, wage equality and labor conditions dictated by the private sector should meet national standards and international codes established by the International Labour Organization (ILO) and other institutions regulating the well-being of workers and promoting decent work around the world.

Policies should also help minimize the sector's labor volatility. **Temporary work** models create uncertainties and insecure incomes. In Honduras, policies driven by NGOs and the private sector fostered product diversification and adoption of new technologies that promote year-round supply. This diversification advances productivity for exporters (process upgrading) and directly benefits women by increasing access to employment during different seasons of the year. In addition, diversifying end markets, as noted in the Honduras case, can help to decrease volatility in demand. Based on this premise, product and market diversification can be a successful strategy for improving the competitiveness and participation of large and small farmers alike (see box 2.2).

Another ongoing problem for female workers is the lack of opportunities for **training**. Women's ability to delicately handle objects has been a successful element in the production and post-harvest management of fragile crops. However, life-long training is not recognized or fairly compensated, and the roles carried out by women in the sector are still considered unskilled. One best practice is the recognition and empowerment of women by public-private partnerships through the certification of skills required at all levels of the value chain. This has begun to shift the global understanding of what is skilled labor. In addition to its important positive impact on the self-esteem and psychological well-being of workers, competency certifications reduce transaction costs related to recruitment and facilitate labor mobility. This helps foster the establishment of a competitive labor market, based on actual skill level rather than on

Box 2.2 ■ Product Diversification for Year-round Supply and Increased Income: USAID Assists Smallholders in Kenya

In 2004, the United States Agency for International Development (USAID) started the Kenya Horticultural Development Program (KHDP). The program worked with small farmers in Malindi, Kenya, who relied on subsistence farming of maize and sorghum and the production of mango and cashew cash crops, which earned income for only part of the year. KHDP set out to teach farmers about alternative cash crops that are not only of higher value, but also have complementary harvesting seasons, such as sweet potatoes, passion fruit, and African Bird's Eye chilies. This allowed farmers to diversify their income over the course of the year. In addition, through training and extension services, KHDP helped farmers adopt new technologies, such as the use of raised bed cultivation, improved planting materials, and integrated crop management (process upgrading); this facilitated year-around production and reduced vulnerability to drought. By 2007, all smallholder farmers in the group had adopted the new technologies and diversified production, with the overall result of increased year-round income and a general feeling of empowerment.

Source: USAID 2007.

gender-biased social constructs and perceptions of male and female abilities. Certification has been adopted by some of the most successful developing countries in the industry (see box 2.3.)

Box 2.3 ■ Chile's National Labor Skills Certification System

Chile's National Labor Skills Certification System was created in 1998 by Fundación Chile. The system provides a framework for the recognition of competencies regardless of how they were acquired, with the goal of improving industry competitiveness. The program has involved both public and private stakeholders from 15 industries. More than 500 occupational standards have been established, and 40,000 workers have been certified. These skills standards have been transferred to vocational training institutions to refine their curricula. At the same time, workers who have not passed the evaluation are offered training courses to fill the skills gaps and later receive the certification of skills diploma.

This system has identified the skill profiles required for jobs performed in the horticulture production, packing, and cold storage stages, as well as in the processed fruit and vegetables segment. Today, more than 9,000 workers in these segments have been certified. For example, in the production stage, a diploma is granted to a person who manages the program on the farm; in the packing plant, a person who has the skills to pack fruit in a box will receive a certification; and in the processing stage, there is a certification of skills for workers who can pit fruit or operate a machine to seal cans.

The main advantages of this system are to facilitate the workers' portability of skills; decrease uncertainty in hiring, making it more efficient; grant credibility to worker's abilities; and, most important, foster pride among certified workers. This system is still in a nascent stage and needs to be expanded. Additionally, a subsystem is needed that can train workers not meeting the certification evaluation.

Sources: Araneda 2010; Chilealimentos 2010; Fundación Chile 2007; Kis and Field 2009; Lopez, 2010.

Other programs have focused on certification and training for key roles where women are dominant (see box 2.4).

Policy initiatives must tackle both subtle and overt forms of sexual harassment and discrimination that can stifle growth and productivity. Sexual harassment and discrimination often go unreported by women, because they are unaware of their rights and because they are afraid to lose their jobs. Policy recommendations in this area include incorporating women in workers' committees in companies to promote women's interests and build awareness of the challenges facing them at the supervisory and community levels; educating male supervisors on women's rights; and the adoption of zero-tolerance policies by management. These policies may be driven by private companies within the chain and through certification bodies that signal the market with respect to the chain's conditions, such as the Ethical Trading Initiative (see box 2.5).

Unpaid Labor: Policy Recommendations

Women working as unpaid family labor are disempowered. Providing access to external work opportunities within the sector, such as in pack houses, can offer alternatives to the often poor conditions of their unpaid role. Indeed, off-farm female work raises the income of smallholder farmers (Maertens 2009) and may encourage men to relieve their wives of unpaid labor responsibilities. An alternative to mitigate the constraints on women is by fostering a transition of women from unpaid family laborers to

Box 2.4 ■ Training Women in Fruit Packing and Grading in South Africa

In 2005, South Africa's Agricultural Sector Education Training Authority (AgriSETA) joined forces with the South African National Training Institute to provide "learnerships" for women in the fruit packing segment of the value chain. These women received National Certificates in Fruit Packing and Grading Processes (NQF Level 3). The program provided both theoretical background and practical hands-on application of the topics covered in the course. The program focused on educating the women with respect to the entire GVC, including, for example, visits to the port to see the product being loaded on ships. The investment in these workers paid off, with participants expressing increased commitment and loyalty to the company as well as increasing productivity and improving attitudes towards training.

Source: AgriSETA 2007. Note: NQF = National Qualifications Framework.

Box 2.5 ■ Creating a Great Place to Work by Fostering Women's Rights: Homegrown Kenya and the Ethical Trade Initiative

Toward the end of the 2000s, Homegrown, the Kenyan subsidiary of UK-based Flamingo Holding, recognized the need to improve social conditions across their nine operations. Flamingo Holdings, a member of the Ethical Trade Initiative, has over 6,500 employees, of which half are women. The decision to improve social conditions was driven by the desire to transform the company into a great place to work, and to help foster productivity and creativity. The company established women's committees, along with others based on welfare, health, and safety. These committees became increasingly aware of women's rights and challenges and focused on improving their participation in the company. The company trained its supervisory staff on both sexual harassment and discrimination issues and on good management techniques and empowered them to handle more of the day to day questions involved in operations. These staff members became trainers to impart the course to other employees, and in doing so, awareness and appreciation for equal treatment regardless of gender were reinforced throughout the workforce. The benefits were notable: the proportion of female supervisors increased from 10 percent to 25 percent; women's advocates were incorporated into each department to secure female rights; and women began to be recruited into roles that were traditionally reserved for men, such as security guards, drivers, and mechanics.

Source: Ethical Trading Initiative 2011.

independent producers in their own right, as is discussed in the following section.

However, where women choose to stay, or are unable to make this decision for themselves, the intra-household division of labor and income is difficult to influence externally. It must be fostered broadly. A good example of encouraging gender equality within the household in the fruit and vegetable industry specifically is by engaging the smallholder as an integrated family unit, rather than interacting only with the male head of household (see box 2.6).

Women as Entrepreneurs: Policy Recommendations

Easing gender constraints for female producers is especially complex, because the challenges are deeply rooted in societal issues. Understanding and encouraging women as economic agents can have a substantial impact in their role as entrepreneurs. Male migration from rural areas and the

Box 2.6 ■ Empowering Women by Engaging the Family: FUNDER in Honduras

Fundación para el Desarrollo Empresarial Rural (FUNDER), an NGO focused on promoting rural development in Honduras through the organization of smallholders into firms owned jointly by family members, designed their gender strategy around the integrated family unit. The organization realized that their most successful producers were those in which the whole family (wife and children) was engaged in the production and sale of fruits and vegetables.

Training programs incorporate all family members and recognize existing strengths of men in production. The organization focuses on training women in business administration practices that can help the firm add value to their product. Family ownership of shares in the firm includes both husbands and wives. In addition, FUNDER helps arrange internships with large exporter firms, where exposure to the role of women as waged labor helps foster a change of attitude.

Source: Maradiaga and Galo 2011.

increased impact of HIV/AIDS on productive men highlight the need for women to be more adequately prepared to fill vital roles as outgrowers. Policies directed at this group of women should focus on integrated access to land, finance, training, markets, information, and support. Generally, policies of this type are driven by a mix of institutions that range from government and NGOs to the private sector.

As with waged labor, lead firms in the private sector can play a particularly influential role, be it motivated by economic arguments such as quality improvements⁴⁴ and guaranteed long-term supply, or by corporate social responsibility initiatives to boost the company's image. Due to their control over supply chains, these firms can minimize gender-intensified barriers confronting female producers in ways that are potentially simpler than approaches by government or other locally embedded actors. For example, they can require a certain gender composition of outgrower programs, shift from land ownership to land access requirements for outgrowers, and provide gender-targeted financial support, training, and extension services.

Entry and upgrading in the horticulture sector for female producers can be facilitated in several ways. **First**, initiatives must recognize which products are more efficiently produced by outgrowers. Direct competition with male producers for limited access to the value chain can be reduced, for example, by targeting products that require a more “delicate touch” (see box 2.7).

Box 2.7 ■ Upgrading Opportunities for Women in the Horticulture GVC: A Case of Chilean Berries

The Agriculture Research Institute within the Chilean Government is currently implementing a three-year program to increase farmer income in GVCs. This program was established in Loncoche in the south of Chile, with the objective of promoting high-value agriculture, specifically berries (raspberries and blueberries). The location selected offers the correct climate, has export companies with packing facilities that use the outgrowers system, and has high participation of female labor. However, constraints have to be addressed, such as poor organization, low productivity and quality, lack of skilled labor, and low technical capacity. In response, the program provides technical assistance and training to meet global standards.

This three-year initiative expects to boost berry production per square meter, improve production quality, extend the harvest period, and consolidate a small farmers group to market and buy inputs with better results. The initiative supports 18 small farmers (half of them women) led by an agronomist, expert in berry production. In the berry industry, female participation is significant, not only as entrepreneurs, but also in the picking and selection process.

Source: Instituto de Investigaciones Agropecuarias-Gobierno de Chile 2011.

Second, policies must address the key constraints women face. One of the critical issues is **access to land and finance**. Ideally, at the national level, policies should be in place to overcome the problem of land ownership and allow women and men equal rights to own and rent property. However, in reality, broad national land policies are politically charged and highly difficult to implement. Thus, since access to finance often requires secure land as collateral, innovative approaches not based on land ownership are needed to increase female access to capital. They should be accompanied by education programs to increase awareness of how successful female credit repayment can be and to influence exporters to incorporate female producers into their outgrower programs (see box

⁴⁴ Several studies have indicated that female production can equal if not surpass male production in certain cases (Chan, 2010). For example, one study shows that when providing female entrepreneurs with the same inputs and education as men in Burkina Faso, Kenya, and Tanzania, they could increase their output and incomes by an estimated 10–20 percent compared to male producers.

Box 2.8 ■ Financial Benefits of Engaging Female Producers: Asian Vegetables in Honduras

One large exporter of Asian vegetables in Honduras has increased female producer participation to 30 percent over the past 15 years. The production of Asian vegetables in Honduras is strictly export oriented. There is no domestic market for these products. Due to the tight credit markets facing agricultural producers, exporters need to provide producers with both inputs and credit.

The exporter initially began operations with 100 percent male outgrowers. The death of one of his leading producers and the subsequent replacement by his wife began a process of female integration into the outgrower group. The wife quickly became the group's best producer and stewarded in more female producers, based initially on their ability to produce a product of equal, if not better, quality than male outgrowers. However, after years of working with these women, the exporter realized there was greater value to their participation. Female producers' late credit repayments were virtually zero, compared to the men's much higher rates. Financing costs for the exporter were therefore lower amongst the female producers. The exporter now actively recruits female producers to the team. Similar experiences have also been recorded in Kenya.

Source: World Bank, based on Honduras field research; Chan 2010.

2.8). USAID's Development Credit Authority, for example, has run several loan guarantee programs targeted at the agricultural sector in Swaziland and Uganda. The Uganda program, which ran from 2002–07, provided guarantees for uncollateralized loans, and saw an increase in lending to participants following the end of the program as a result of the reduction in information asymmetries. Female outgrower participation can be fostered by improving policies to support the growth of female-owned small and medium-sized businesses, providing access to financial instruments, and teaching business management skills.

Policies to encourage women as entrepreneurs must also include recommendations regarding **access to education and training**. Access to formal education can be facilitated in the long term, but for existing producers, short-term training is more appropriate and attainable. This can be carried out by different stakeholders in the industry, such as industrialized country development agencies (as noted in box 2.9), NGOs, the private sector, public-private partnerships, and so forth (Fernandez-Stark et al. 2011a). Due to barriers to entry established by

global and private standards, training should be multifaceted, focusing on both managing a small business and on technical information regarding crop cultivation, including record-keeping, pesticide application, and bio-safety. These skills are essential to ensure that female producers can provide competitively priced, compliant, high-quality products that meet the requirements of global buyers. This training should be designed according to women's needs and be scheduled at times and in locations that do not interfere with essential family activities.

Above all, it is critical to **promote measures that foster access to markets** to increase female participation in international horticulture trade. Certifications such as organic, ethical, and fair-trade initiatives have helped develop product niches that can provide opportunities for female growers (see box 2.10). These certified products are complemented by a range of products that leverage compelling stories behind the brand. Policies that support female producers' access to these niche markets, best known in the coffee sector, can help them leapfrog major challenges that smallholders face in producing for export. In addition, it is crucial to pursue initiatives that educate buyers as to the business case behind including female producers. This is highlighted not only by the Honduras case (see box 2.10), but also in guides such as that published by the Bill and Melinda Gates Foundation, *Improving Opportunities for Women in Smallholder Based Supply Chains* (Chan 2010).

Connecting women to **local and global industry networks** is a central element of promoting female outgrow-

Box 2.9 ■ Training and Extension Services Targeting Women: USAID-ATEP Ethiopia

The USAID Agribusiness and Trade Expansion Program in Ethiopia (USAID-ATEP) was a five-year project launched in 2006 to increase the productivity and competitiveness of several sectors, including horticulture. Initiatives targeting women and providing on-farm training have been incorporated into the horticultural program, which covers all aspects of smallholder supply, from production, post-harvest handling, market information, record-keeping, and business development, to training to meet the high standards for export certification. Twenty-five lead female clients receive extension services from teams that include agronomists, marketing specialists, and business skill trainers, who are prepared for gender-sensitive issues.

Source: USAID 2009b.

Box 2.10 ■ Easing Constraints through Accessing Market Niches: Organic Production

Organic production includes fruits and vegetables that are cultivated in ways that integrate cultural, biological, and mechanical practices fostering cycling of resources, promoting ecological balance, and conserving biodiversity. The organic industry began retailing in the 1980s and is driven by high demand. It is a market segment in which female participation has reaped significant rewards. Due to their chemical-free and environmentally friendly characteristics, organic products receive high premiums over conventionally produced crops. Although all products can be grown organically, certain gender-biased crops can receive much higher premiums, such as organic blueberries, which earn more than a 100 percent premium. A study carried out by the International Federation for Organic Agricultural Movements on “Organic Agriculture and Women’s Empowerment” surveying women’s empowerment in Bangladesh found that in organic production, women had greater decision-making power, improved positions within the value chain, and had greater access to inputs and market for organic products than for traditional products. The fact that these products are produced on small plots and do not use pesticides decreases key input costs and avoids a traditionally male-dominated role. Furthermore, as is shown in a case study based on a female-owned Ugandan organic fruit and vegetable exporter, the significant premium paid for organic produce increases available cash flow for exporters. This in turn provides access to low cost capital, which can be loaned to female growers through resource provision contracting. Access to capital provides opportunities for both product and process upgrading and increasing productivity.

Sources: *Farmworth* and *Hutchings* 2009; *USDA* 2011a, 2011b.

ers. This can empower them to access key elements they need to manage successful businesses, such as information about end markets, new technologies, or product varieties. Programs can include organizational and financial assistance for the formation of women’s associations that provide female producers with a voice in policy making and increase their bargaining power with respect to other actors in the chain (see box 2.11).

Conclusions

This chapter shows that the horticulture GVC and its upgrading dynamics have important gender dimensions and that the chain is influenced by, and at the same time

has an impact on, gender relations. The fruit and vegetable industry has high female participation. It has been hailed as an important transition from traditional agriculture for developing countries and provides employment and significant post-harvest opportunities to add value. Developing countries have upgraded into producing for export, including packing and processing services such as washing, chopping, mixing, bagging, branding, and applying bar codes. Our analysis shows that upgrading has been supported by the flow of female labor into the sector. In developing countries, this sector today is characterized by a large number of female workers, who often outnumber their male counterparts.

Developing countries are participating in and taking advantage of horticultural production, but women in the sector face gender-intensified constraints for a variety of reasons, including traditional local and global social and economic norms. These constraints differ according to the three roles women fill in the value chain: waged labor, unpaid family labor, and entrepreneurs. Female waged laborers face challenges with respect to discrimination in compensation, work conditions, access to training, and direct sexual harassment. Women entrepreneurs’ efforts

Box 2.11 ■ Women’s Associations and Institutional Building for Smallholder Female Farmers: SEWA India

The Self-Employed Women’s Association (SEWA) is a large organization based in India that promotes self-reliance, such as food, social, and income security, and empowerment of women around the country. Of its 1.25 billion members, 36 percent are female farmers. The association has followed a grass-roots and network approach to build a powerful national organization, which by leveraging social relationships, benefits women through better linkages to formal markets and increasing their bargaining power. The association goes door-to-door, signing up female farmers whom they then link into local, community-based, self-help groups (SHG). These SHGs are then linked regionally and nationally with organizations that provide services, such as credit and other financial services. The association regularly runs training programs for SHGs, either in person or via video conferencing. Training topics include capacity-building (training in literacy, technical skills, financial literacy, leadership, and management skills), establishing market linkages for both inputs and outputs, and improving access to financial and support services.

Source: *Herbel* 2010.

to enter the value chain and upgrade into higher-value activities are complicated by difficulties in accessing key inputs, such as land and market information.

To overcome upgrading constraints, policy makers must first recognize the contributions women make to the industry and acknowledge women as valuable economic agents in facilitating export growth. They must understand the burden that these women bear with respect to their reproductive responsibilities, which could be alleviated in part by improvements in basic infrastructure, freeing time that could be devoted to the industry's expansion and upgrading. Policy initiatives to reduce these participation barriers should be driven both from the top down and from the bottom up, with inputs from policy makers in international organizations, to decision makers in firms, to NGOs that help mobilize the workers themselves.

Internationally, shifts in trade policies are needed to ensure fairer competition for developing countries in higher-value segments of the value chain where female

participation is concentrated. Nationally, traditional and socially embedded constraints, which include land ownership, access to finance, education, and training, should be examined and mitigated where possible to allow for equal opportunities between men and women. Given the power of the lead firms in global fruit and vegetable chains, perhaps the greatest changes can be driven at the industry level by firms directly intervening to remove constraints through the use of targeted sourcing policies. This requires firms be convinced of the business argument to do so and that they act within the context of international norms and the promotion of the decent work agenda.

Despite these constraints, female participation is strong and the analysis highlights that upgrading draws women into the value chain rather than excluding them. This can create a virtuous cycle with respect to gender-intensified constraints, because female participation fosters successful upgrading, while upgrading increases female participation.

Global Value Chains, Economic Upgrading, and Gender in the Tourism Industry

Michelle Christian

Executive Summary

Tourism is an important industry for many developing countries. Over the past 20 years, developing countries have turned increasingly to international tourism development models to earn export revenues, increase employment, and develop rural regions. An estimated 40 percent of world tourism arrivals and 30 percent of revenues involve developing countries (UNCTAD 2010). Gender-related factors in destination countries and the global industry's business strategies contribute to creating a gendered tourism global value chain (GVC). Men and women have different access to employment and entrepreneurial activity.

Using the GVC framework, this chapter explores these gender dynamics, particularly how economic upgrading in the tourism GVC is a product of gender dynamics and also creates gender consequences. Gender constraints can limit tourism workers' and entrepreneurs' upgrading opportunities, which in turn leads to gendered compositions of work and unequal working conditions. The chapter first analyzes the tourism sector at a global level and unpacks how gender constraints are located at the global lead firms, tourism destination firms, and national institutional levels. The case of Kenya and the economic upgrading of Nairobi-based tour operators and Mombasa-based hotels are then analyzed to uncover how gender dynamics are embedded in the upgrading process.

Key findings of the chapter are as follows:

The Tourism Value Chain: Organization, Governance, and Economic Upgrading

- The tourism GVC comprises segments that follow the activities an international tourist completes. Segments are divided between outbound (where the tourist travels from) and inbound (where the tourist travels to) and include: international distribution options such as a travel agent or tour operator, in-

ternational transportation, national distribution and transport within the destination, accommodations, and excursion activities.

- Economic upgrading in the tourism GVC happens in multiple segments. Functional upgrading in the broad tour operator category is the most linear example, with a guide becoming a local arranger before expanding operations to become a national and then regional tour operator. Product upgrading in the accommodation segment occurs when lodging options create a larger (with bed counts) or more luxurious product. Hotels can also functionally upgrade if they add additional services, such as transportation, tour, and dining options.

Gender Dimensions of the Tourism Value Chain

- The number of women involved in the industry varies by destination. Overall, women are represented in multiple job categories in all segments of the value chain but are overrepresented in accommodations and excursions. Within these segments, they are engaged mostly as low- to mid-skill workers in hotels (for example, housekeeping, laundry, and food and beverage); and as independent workers or entrepreneurs (for example, artisans, retail vendors, and support staff in family restaurants).
- Ethnic, racial, and nationality status affect the extent of gender composition in employment and business ownership. Members of marginalized ethnic groups can face significant constraints, whereas women from high-status groups, such as immigrants from developed countries, are better positioned to overcome gender-intensified constraints, because they have financial resources, high skill sets, and social capital. Family status (for example, wife, mother, or money-earner daughter for extended family) and age can accentuate constraints.

- Gender-intensified constraints are created and affected by practices of global and national firms and public policies at the destination level. These practices create conditions that shape the gender composition of the tourism workforce and entrepreneurs and the abilities of women and men to benefit from economic upgrading in the GVC.
 - **Global lead firm practices**
 - **Pricing** pressures from global tour operators can encourage the casualization of labor, which impacts men and women differently. Women suffer disproportionately due to the insecure nature of casual work.
 - **Standards** set by global distribution firms can limit the upward mobility of female workers and entrepreneurs, due to barriers to education and networks women face when trying to satisfy lead firm requirements.
 - **Gendered jobs** determine which jobs are available for females. Some global tourism firms have overt gender beliefs about which jobs should be for men and women, such as with mountain guides.
 - **Tourism products sold** by global distribution firms impact the types of jobs available to females and market access for female entrepreneurs. Safari products are highly masculinized, while cultural tourism allows more opportunities for women working in traditional artisan roles.
 - **Tourism destination firm practices**
 - **Social norms and local contexts** can dictate how firms make gendered hiring decisions. Some jobs are labeled “men’s” or “women’s” work; for example, safari drivers and guides are perceived as male jobs. Some cultures may discourage female employment entirely.
 - **Supplier decisions** made by national tour operators and hotels can support gendered job beliefs and can perpetuate male-centric business networks.
 - **Tourism destination institutional practices**
 - **Access to international markets** for female entrepreneurs can be hindered by gender-intensified constraints. Household responsibilities, lack of financial capital, and gendered social networks can constrain female tour operators.
- **Marketing and industrial policies** have multiple effects for tourism workers and entrepreneurs if one form of tourism is marketed over another or if pro-female business strategies are absent.
- **Land and finance policies** impact women’s access to title deeds and loans to build tourism businesses and their ability to benefit from tourism development on private land.
- **Education and skills attainment policies** impact the ability of women to acquire competitive tourism skills.
- **Family and labor policies**, such as weak maternity support and overt discrimination, can lead to intensified constraints for female workers.

Policy Recommendations

Several gender-sensitive policy avenues may be pursued by stakeholders, which include the public sector (tourism and trade ministries), the private sector (global lead firms and tourism destination firms), international development organizations, nongovernmental organizations (NGOs), and multilateral institutions. The following policy options may help create more gender equitable outcomes and pathways to upgrading trajectories to help ensure competitiveness:

- Leverage the powerful role of global tour operators and global hotel brands to implement third-party monitoring of suppliers or encourage suppliers to implement pro-gender employment and anti-sexual harassment policies.
- Support Pro-Poor Tourism programs that foster female supplier linkages.
- Support equitable participation of females in community-based tourism negotiations and implementation.
- Create pro-female hiring business strategies for jobs that women are traditionally excluded from, such as drivers and guides and support staff at remote camps.
- Enforce anti-sexual harassment policies.
- Create strong tourism development plans that are sensitive to gender constraints for workers and entrepreneurs.
- Facilitate women’s access to training for management and excursion and guiding activities, and provide instruction that addresses tourism’s gender dynamics.
- Support better housing and access to basic infrastructure for rural communities involved in tourism

- to reduce the reproductive burden on women, allowing them time to participate in productive work.
- Implement and enforce gender-sensitive land, finance, and family policies.

Introduction

Global tourism in developing countries has consistently risen over the past 20 years as they have increasingly explored industrial development models that move beyond traditional manufacturing, agriculture, and extractive industries. The introduction of service-based industries, in particular, global tourism, is often lauded as a pathway to earn foreign exchange, promote economic growth, and generate employment for large numbers of low-skilled workers. In 2007, tourists spent US\$295 billion in developing countries, triple the level of monetary assistance given by the donor community (Mitchell and Ashley 2010). For least-developed countries (LDCs), tourism accounts for up to one-half of their foreign exchange earnings and 40 percent of GDP.

The entry of developing countries into global tourism and the perceived low-skill nature of the sector, along with its ability to harness natural and cultural assets in any given area to create tourist products,⁴⁵ has led to the perception that the industry is “pro-poor.” It is often also referred to as “pro-women” because of the presumed weak barriers to entry for female workers. Yet as Mitchell and Ashley (2010) highlight, evidence for both claims is often weak and mixed. Buzz words, such as “community-based,” “private conservancy,” “ecotourism,” and “responsible tourism” are commonly touted as successful forms of tourism development and women are often assumed to be the direct recipients of growth of these tourism models. However, without a full analysis of how the tourism sector functions, it is difficult to make blanket assertions about the sector’s ability to alleviate poverty, create better livelihoods, and support women. To make any pro-gender claim, indeed, we first must unpack how women are included, excluded, or stratified within the industry.

To date, there have been few applications of value chain analysis to the tourism industry. However, multilateral agencies and development organizations have begun to apply this methodology to uncover key points along the chain where interventions can be made to alleviate poverty. The Overseas Development Institute⁴⁶ has carried out several tourism value chain studies in developing countries, particularly in sub-Saharan Africa and South-east Asia. The International Labor Organisation (ILO) and

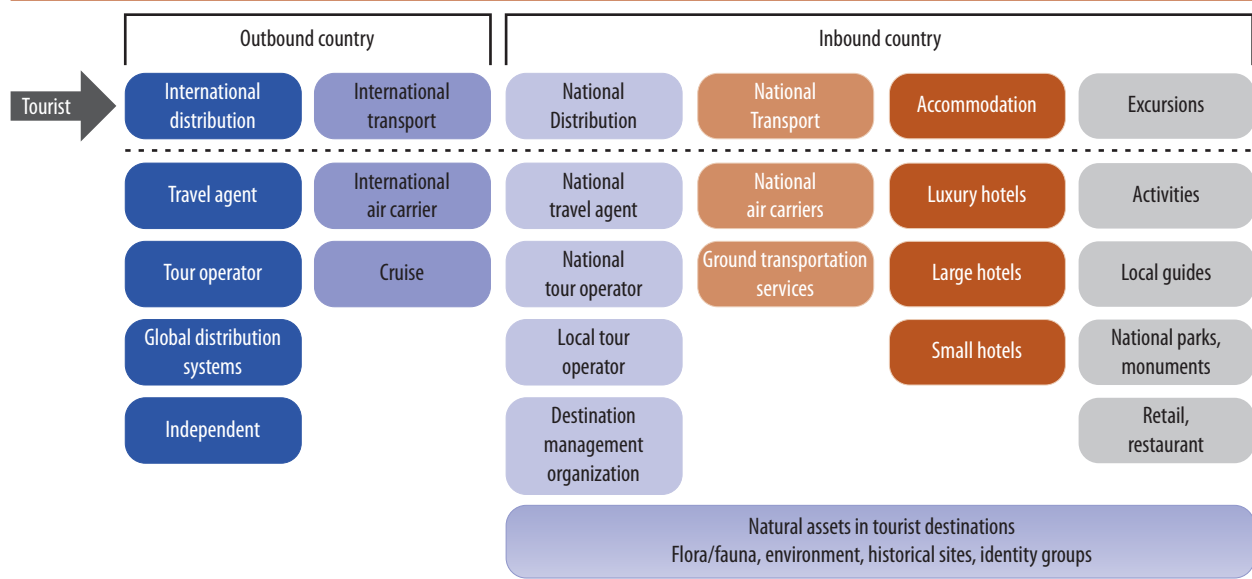
the UK Department for International Development are also actively involved in learning how to harness tourism’s pro-poor capabilities.

These studies are useful in that their approach follows the tourism dollar and identifies which segments and firms capture the most profit. These reports, however, are mostly descriptive and little explain how relationships between firms, the role of standards, and institutional arrangements constrain or benefit poor individuals’ participation and rewards. They also do not address whether, how, and why local tourism firms are able to upgrade. Furthermore, the focus on the cost structure and tourist spending habits, while important, fails to capture the larger labor implications, such as how the structure of the tourism value chain promotes the creation of different categories of workers (for example, permanent, contract, casual, and independent), and how these workers are subject to varying working conditions and rights. Gendered conditions of work, participation, and benefits, as well as their impact on upgrading, are also left out.

This chapter examines how gender is embedded in the tourism GVC and stages of economic upgrading with a case focus on Kenya. It is divided into four broad areas. First, we conduct an overview of the tourism GVC and forms of economic upgrading. Second, a gender perspective is applied to tourism GVCs. In this section, practices that create gender constraints for tourism workers and entrepreneurs from global lead firms, tourism destination firms, and destination institutions are identified. These practices show how gender shapes economic upgrading opportunities in the tourism GVC and creates gendered outcomes from upgrading, such as working conditions, the types of jobs available, and household-related issues. Third, we examine the tourism GVC in Kenya, with a focus on gender dimensions of upgrading in two segments of the industry—Nairobi-based tour operators focused mainly on the safari segment, and hotels in Mombasa’s beach tourism sector. The manner in which firms of these two segments exhibit gendered implications for, and effects of, economic upgrading is explored. The chapter closes with policy recommendations and conclusions.

⁴⁵ Leading development multilateral institutions such as the Overseas Development Institute, the World Bank, and the International Labour Organization (ILO), and other NGOs are all actively examining how tourism can be pro-poor.

⁴⁶ With financial assistance from the Netherlands Development Organisation (SNV), the World Bank, and the International Finance Corporation (IFC).

Figure 3.1 Tourism Global Value Chain

Source: World Bank.

The Tourism Global Value Chain

Just as there are limited studies adopting a gender perspective of the global tourism sector, there are also few studies where a GVC framework is applied to the industry.⁴⁷ Part of the challenge for a GVC analysis is definitional. Debates arise on how to define where tourism begins and ends and how to measure it. Nonetheless, there is consensus that tourism overall is a collection of interrelated industries that are joined through their function of supplying tourists' needs. The Tourism Satellite Account (TSA) system, developed by the United Nations World Tourism Organization (UNWTO) and the Organisation for Economic Co-operation and Development (OECD), has the most broadly adopted measure by tourism destinations. TSA defines tourism from a "demand side" perspective, comprising all of the goods and services consumed by tourists as well as investments made for consumption. The tourism GVC presented below also adopts this approach.

Structure of the Tourism Global Value Chain

In figure 3.1, we outline a tourism GVC. The chain follows Doerry's (2008) designation that a tourism GVC follows a tourist's eyesight, or perhaps more appropriately, their footsteps. The chain is divided by the activities a tourist undertakes in both their country of origin (outbound country) and the destination country (inbound country). The categories of firms are not mutually exclusive and many firms take on multiple functions.

The global tourism industry begins in the country of origin of the tourist. In the outbound country the first thing tourists do is decide how to purchase their tourism services. They might choose to go through an intermediary such as a travel agent or a tour operator; or they might book all of their segments independently. The way in which tourists do so is referred to as the distribution channel. Most distribution channels serve the purpose of providing information, bundling tourism products, and confirming and paying for reservations (Buhalis 2001: 8).

Tourists then travel to their international destination, most commonly through air travel. Once they arrive at their destination, if they booked through a tour operator or travel agent, a national tour operator meets them at the airport. They will next be transported to their accommodation provider and from there, partake in a series of excursion or event activities that focus on the specific tourism product or mode, such as beach outings, mountain climbing, or cultural guided tours. Natural assets in destinations are used to promote these particular tourism products. The

⁴⁷ Academic studies in economic geography, economics, and political economy have attempted to link the divergent firms that cumulatively make up the tourism sector through focusing on different types of networks between firms (Tremblay 1998); highlighting one or two subsectors (Clancy 1998); or by focusing on specific unequal power relations between foreign lead firms and destination firms and communities (Britton 1983; Doerry 2008; Mosedale 2006).

broadest tourism types are beach (sun, sand, and surf), environment, cultural, medical, and business.⁴⁸

Industrial Organization and Chain Governance

At each stage of the tourism experience, there are firms that specialize in the particular segment and many firms cover multiple segments. Lead firms have coordination, logistic, and bundling capabilities as well as direct international marketing access. Global tour operators, large or chain hotel brands, cruise lines, and international air carriers exhibit these aspects the most.⁴⁹ These firms in varying ways are able to shape the distribution channel and thus are the drivers, or lead firms, in the tourism GVC. They create various transnational linkages with tourism destinations in a variety of alliance, consolidation, and outsourcing strategies. These global-local connections structure how economic and social benefits are distributed within destinations by influencing the creation of domestic linkages and the level of leakages (that is, tourism revenues lost to other countries and/or firms). Different lead firms exert their influence with varying positive and negative consequences for destination firms, workers, and entrepreneurs.

The two central issues are access and bundling. Global lead firms are strong and influential in developing country destinations because they have direct access to international tourists. Because many of them have brand reputation strength and are well versed in the consumer preferences of the outbound markets, tourists will first go to them for their travel expertise. Furthermore, many tourists from developed countries choose to mitigate the risk and uncertainty of international travel by working with firms based in outbound countries for trip planning and execution. These firms are adept at bundling and then selling a series of tourism services that they execute themselves, outsource, or receive commission fees for selling. To varying degrees, they exhibit vertical integration and subcontracting strategies to include almost every aspect of the value chain. These firms, therefore, have the ability to shape the entirety of a tourist's experience by coordinating and executing all of the services and influencing the choice of which other tourism firms are involved. Firms that control access and bundle experiences can exact price points; require specific service, safety, or environmental standards; and dictate the overall nature of the inter-firm relationship for those firms that are part of their tourism supplier network.⁵⁰

Although the strongest of these firms are based in developed outbound countries, in each developing country there are destination-based lead firms that typically fill important roles in the value chain and can hence control ac-

cess, steer tourists, and require specific standards for their suppliers at the community level. National tour operators who are subcontractors for global tour operators and large domestic and regional hotel brands that become accommodation providers of choice in tour packages fill this role.

Economic Upgrading Trajectories

Economic upgrading in the tourism value chain is not necessarily a linear path. Different forms of upgrading happen simultaneously in the various subsectors and localities. Using Humphrey and Schmitz's (2002) economic upgrading typology for the tourism sector, we can outline four broad upgrading examples at the firm level (see table 3.1). *Functional upgrading* entails firms adding on more services and capabilities; *product upgrading* involves moving to a higher-value product; *process upgrading* is when firms perform their functions better and more efficiently; and *chain upgrading* happens when firms become connected to global actors and/or enter into the value chain from a different sector. These pathways are not always consecutive, and often firms start out immediately at a relatively high level; for example, a tour operator beginning as a national tour operator or a new hotel opening up as a five-star venue. Firms can also leapfrog past certain steps. At the national or community level, there is chain upgrading if the area is able to attract international tourists, and product upgrading if they are able to expand their tourism products or types, such as becoming a cultural tourism destination in addition to offering wilderness tourism.

Tourism is simultaneously a low- and high-skilled industry because of the diverse job categories within seg-

⁴⁸ Specific forms are embedded in these types, for example, environmental can include nature-based, adventure, and safari. Cultural tourism can be religious, indigenous, or historic. Most countries develop multiple tourism types and products.

⁴⁹ Travel agents that are attached to the portfolios of Global Distribution System (GDS) companies possibly could be added to the list as well. GDS provides a shared platform for information regarding airline and hotel scheduling and prices to be shared, and travel agents can reserve and book directly in real time. Providers pay a fee to GDS companies when bookings are made through GDS software. Although, technically, any firm can get access to GDS if they have the capital and technology, GDS plays a key role in which providers get distribution access. Moreover, virtual travel agents are becoming the retail arm to many GDS companies and represent the top global travel retail firms.

⁵⁰ A more equitable distribution of risk and the costs and training associated with improving standards by smaller destination suppliers would help spread out the demands placed on destination providers in a more fair fashion rather than the supplier being dropped from tour itineraries or distribution options for not meeting necessary standards or price points.

ments along and within the value chain (Christian et al. 2011). Mitchell and Ashley (2010) note that destination labor markets, seasonality, and the relative comparison between types of jobs available shape beliefs about the quality of the work and the available labor force attracted to the sector. For example, in many developed countries, workers employed in tourism-centric jobs such as accommodation are framed as low-skilled; but tourism work in developing countries is often considered desirable and sometimes gleans higher status (Cukier 1996). International tourists judge the quality of service work based on their expectations and perceptions of what they feel represents good service. In other words, part of the fulfillment of the tourism job is the creation of a tourism product that meets specific social and psychological expectations. Those expectations create high barriers for tourism service workers in developing countries, even though the common assumption is that it is an unskilled activity (Dieke 2001). In developing countries, even those job functions that are considered unskilled and do not need specific outside training, such as housekeeping and laundry, are skills that are commonly taught through certification training programs.

Overall, upgrading trajectories are supported by various structural conditions and policies. They typically involve a combination of factors in destination countries, such as the form of supportive industrial policies, human capital development and labor market supply, and access to financial capital, as well as the business strategies and needs of global lead firms in developed countries. In addi-

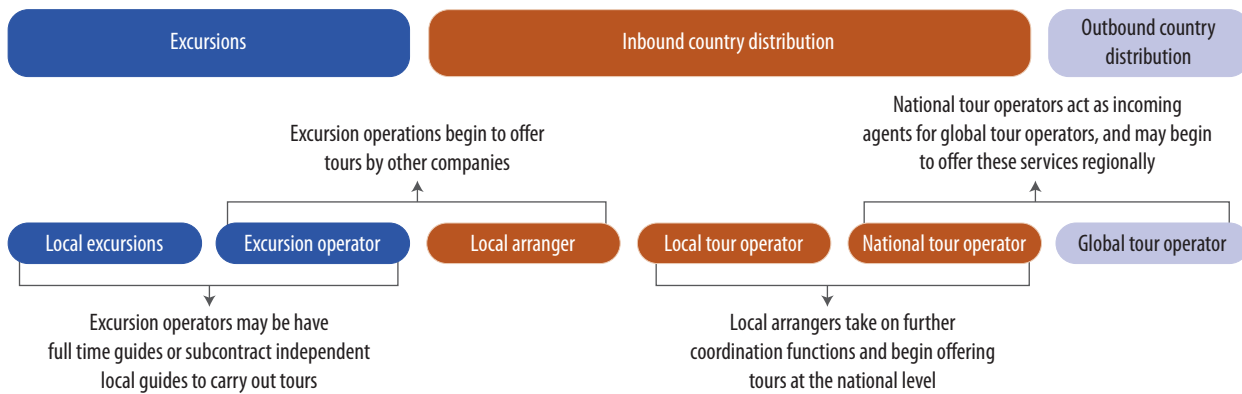
tion, upgrading often depends on factors such as a strong international destination image, infrastructure access for international travel, streamlined customs and immigration procedures, and the ability for destinations and their destination suppliers to get access to international markets. Table 3.1 provides examples of these different types of upgrading in both the distribution/excursion and accommodation segments of the tourism value chain.

Distribution/excursion segments, noted in the second column of table 3.1, are widely viewed at the tour operator level and can be construed as the broadest of the tourism businesses. Firm growth in these segments provides clear examples of functional upgrading in the tourism industry. At the lowest stage are local guides, who typically work as independent contractors or directly for national tour operators. Excursion operators open a business that caters to a key activity, such as bike rentals, snorkeling, or walking tours. The next level is a loosely termed “local arranger.” When any business based in a tourism locality begins to sell or recommend the tours of excursion operators and/or arrange limited logistic services for a commission, they become mini local arrangers. The last two stages are when tour firms gain national coordination and arrangement capabilities, and may work directly as incoming agents, ground operators, or destination management companies for global tour operators, executing all the ground operations for global tour packages. Lastly, they can become regional or global tour operators by creating and executing tour packages in countries within their region and beyond. Some tour operators are

Table 3.1. Tourism Economic Upgrading Trajectories

Upgrading form	Distribution/excursion	Accommodation
Functional	Moving from guide → local arranger → national tour operator → regional tour operator → global tour operator Adding accommodation offerings	Adding on services such as transportation, restaurants, and tour operations
Product	Moving from creating budget or mass-market tour packages to a higher luxury scale and/or adding tour packages and tailor-made packages	Moving from small hotel → larger hotel → luxury scale → brand hotel → management company
Process	Creating a Web site, adopting computer reservation systems Acquiring better transportation vehicles	Adopting computer reservation systems, new technologies
Chain	Artisans or tourist excursion become stops on tour operator packages	Cater to domestic visitors → international tourists Agriculture and artisan producers source to hotels

Source: World Bank.

Figure 3.2 Functional Upgrading in the Distribution/Excursion Segment of the Tourism GVC

Source: World Bank.

also beginning to own and operate their own accommodation offerings such as safari camps, small lodges, and hotels. Figure 3.2 illustrates these upgrading trajectories.

When tour operators engage in product upgrading they typically create new theme product offerings such as a bird-watching tour; or a multi-product tour that includes beach, mountains, and photography; or create packages for new consumer groups like conventions and businesses. They also product upgrade when their offerings begin to cater more to luxurious tour products and shift to being able to create tours that are tailor made to a tourist's preference.

The *accommodation segment* best illustrates product upgrading in the industry, but upgrading can also take on functional qualities when hotels provide services such as restaurant offerings, tour services, or transportation. When hotels take on these additional functions, however, they often also represent a higher-quality hotel product, and thus it can be difficult to fully distinguish between the two types of upgrading. Table 3.1 highlights the different upgrading that occurs in the accommodation segment, as hotels grow into larger, more luxurious operations (product) or adopt new reservation system technologies to increase efficiencies (process). Upgrading to five-star hotel offerings is typically achieved via local property developers owning the facility combined with outsourced management to foreign brands via management contracts. Locally driven upgrading to the five-star segment is less common in developing countries.⁵¹ Global brands such as Marriott, Hilton, or Inter-Continental have multiple hotel brands, thousands of hotel properties, and they are located in several continents. They have strict management contracts with property owners that detail their requested fee structures and management standards. Intuitively, it is

assumed that movement to higher luxury-level accommodation, even if through a globally branded firm strategy, is an economic upgrading pathway for developing countries. A detailed analysis, however, is warranted in order to determine how much of the profits remain in-country, if the hotel uses domestic suppliers for things like food and materials, and how labor is structured.

Chain upgrading is best witnessed through movement into the hotel and tour operator segments, directly or indirectly. For example, when agriculture producers or artisans sell to hotels and resorts or directly to tourists, this is seen as a way for smaller producers and independent workers to benefit from tourism. Tour operators also facilitate chain upgrading for other firms by adding, for example, artisan bazaars or cultural centers to their tour packages.

Gender Dimensions of the Tourism Global Value Chain

Gender beliefs are important in determining the participation of women in the tourism industry overall, in specific jobs, the way women are treated, and the images used to sell destinations and products (Sinclair 1997; Urry 2002). These beliefs result in the concentration of men and women in specific industry roles, as well as gender-intensified constraints that place significant burdens on females and limit their upward mobility. For example, tourism work is

⁵¹ Many hotels represent a bifurcated ownership/management strategy, where many large, branded hotels have different property owners that are often part of hotel groups and management companies that are a mix of property owners and management firms.

seasonal, often based on traditional household tasks, and requires nontraditional hours; therefore, it is commonly framed as fitting the needs of female workers who require more flexibility because of their responsibilities for unpaid household work. The result is that women are constrained to casual labor. These same characteristics can further constrain women through the practices of actors along the value chain. In this section, we examine the gender composition of the tourism workforce in addition to industry practices that generate gender-intensified constraints for both men and women.

However, it would be misleading to suggest that the constraints described below apply generally and to the same degree to all women. Tourism, perhaps more than other sectors, demonstrates how gender is an identity category that intersects with other ascribed identities. The gender implications and consequences for one group of women are not the same for another. Women who have different ethnic, racial, and nationality backgrounds can have divergent tourism work and entrepreneurship opportunities. Gender constraints can be mitigated or amplified when they intersect with ethnic or racial identities (Wood 1997). For example, physical, racial, and ethnic features may be used as markers for job placement; women from different ethnic or tribal backgrounds may find their ethnicity is not being promoted, or that they are left out of tourism product development and ignored as possible recipients of profits from tourism businesses on indigenous or tribal lands (Adler and Adler 2004; Alcorso 2003; Cabezas 2009; Otis 2008). On the other hand, foreign female “settlers” from developed countries, have financial resources, skill sets, and networks that grant them greater advantages over local populations.

Furthermore, constraints differ by age, and are intensified when they combine with the need to meet a wide range of reproductive responsibilities in the home. For example, while women of all ages participate in tourism work, the erratic hours, distance to tourism locations, and physical demands of service work limit mothers with young children, widows, and older women from simultaneously meeting their home care and wage employment responsibilities.

Gender Composition

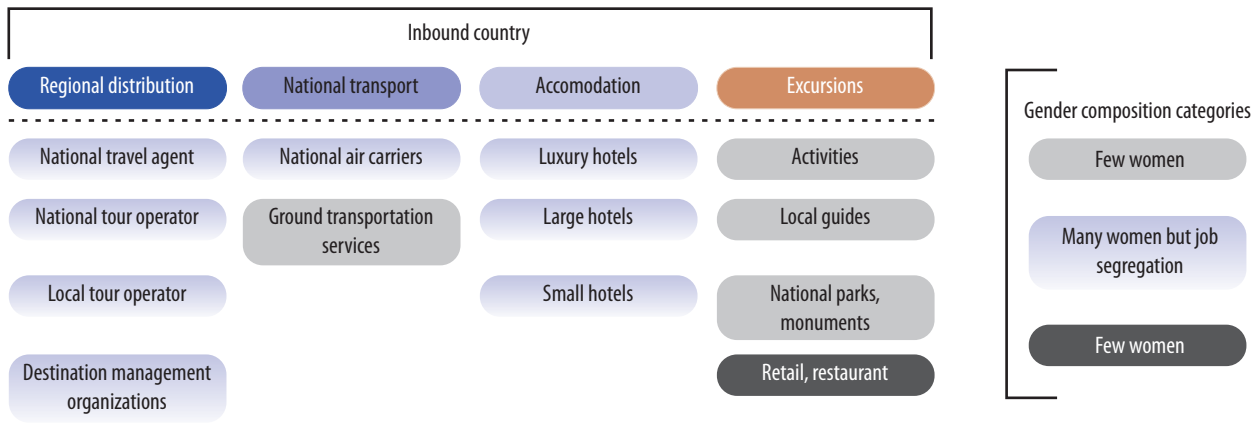
The recent findings of the 2011 United Nations World Tourism Organization (UNWTO) report on women in the global tourism industry highlight where most women are concentrated along the tourism GVC. Within the structure of the value chain depicted in figure 3.3, women in developing, inbound countries are concentrated in the accommodation and excursion segments. Using International

Labour Organization (ILO) Laborsta data of the Hotel and Restaurant category, UNWTO reports that the percentages of female hotel/restaurant employees by region are 58.5 percent for Latin America, 55.4 percent for the Caribbean, 47.0 percent for Africa, 46.8 percent for Oceania, and 35.4 percent for Asia. Within those stages of the value chain, however, women are relegated mostly as low- to mid-skill workers in hotels⁵²—performing, for example, housekeeping, laundry, food and beverage service, and clerical work. Independent female workers or entrepreneurs function as artisan or retail vendors and waitstaff in family restaurants. Women are also concentrated in the regional distribution segment as clerical support staff for tour operators and travel agents. They have a limited role in guide and excursion jobs and in management and business ownership. In addition, according to UNWTO, a global wage gap persists; women typically earn 10–15 percent less than their male counterparts in tourism. Due to their overrepresentation in family businesses, they increasingly participate in the tourism GVC as unpaid workers. This gender segmentation in occupations is often dictated by gender norms and stereotypes, in congruence with structural practices within the value chain highlighted below.

Gender Constraints

Overall, a series of practices underlie the gender compositions of work in the upgrading process and the larger effects from upgrading. These practices derive from the conditions that dictate upgrading opportunities within the tourism GVC, and, in turn, create gender-intensified constraints. Employed by firms and institutions along the value chain, these practices are both overtly genderized (that is, discriminatory assumptions are used to justify them), but mostly subtle (that is, no discriminatory intent was used). Importantly, no discriminatory intent is needed to maintain gender inequality. Below, we highlight examples of practices from global lead firms, destination firms, and institutions in the destination country that support a gendered tourism GVC and limit the upgrading opportunities for female tourism workers and entrepreneurs in particular.

⁵² In her study on hotel workers in Cancun, Mexico, Castellanos (2010: 91) documents that out of 600 employees working for a five-star hotel, 30 percent were women. Of those, 30 percent were employed as chambermaids, 8 percent as clerks, 6 percent as waitresses, 6 percent as cooks, 5 percent as supervisors, and 2 percent as managers. The remaining 35 percent were a mix of receptionists, stewards, tailors, dancers, and hotel animators.

Figure 3.3 Gender Mapping of Tourism Value Chain in Inbound Markets

Source: World Bank, based on findings from UNWTO (2011).

Global Lead Firm Practices

Pricing practices have a strong influence on gendered outcomes in labor markets for tourism workers. Global tour operators, in particular, negotiate contracts with local suppliers. Depending on the bargaining ability of the suppliers, the price points they are expected to meet may be exceedingly low. This can promote the casualization of labor to save costs. Hotels and tour operators may employ various categories of workers, including permanent, part-time, contract, and casual staff. The more flexible and precarious forms of labor may be used quite frequently. Women, especially young women, are more likely to be casual workers due to their lack of education, time in the labor market, and household care responsibilities. Female casual workers are more vulnerable to exploitation and harassment.

Standards affect the upward mobility tracks of workers and entrepreneurs. Destination accommodation and tour operators must meet a series of standards to be suppliers for global distribution firms. Most of these standards are informal and based on a widely perceived international service aesthetic. The formal ones typically have to do with safety. To meet these standards in developing countries, even job functions considered unskilled, such as housekeeping and laundry, are commonly taught through formal certification training programs. However, in many LDC destinations, women still lag behind men in education and skill attainment. Even when there is education parity, women face constraints in gaining the appropriate experience needed to take on management or ownership positions and to become tour operators who are able to meet these standards. Constraints such as not being chosen for internships, inability to relocate to remote tourism locations, and

constructed assumptions of women being unable to manage men all can impede women. Besides skills and know-how, also access to financial capital (where women often face intensified constraints—see below) is often necessary to make required changes to adapt to standards.

Gendered jobs shape which jobs are available for female workers and which for males. Some global tourism firms have overt gendered notions of which jobs should be conducted by men and women, and they choose destination providers based on that assumption (Christian 2011). Nature and adventure tourism are particularly masculinized forms of tourism. Many excursions and activities are guided by men who fit a particular image of who can climb mountains, ride off-road on all-terrain vehicles (ATVs), or go sailing, all while assisting tourists in the process. Safari guiding and driving in the “bush” romanticizes a masculine safari hunter of a bygone era. Individuals who challenge these stereotypes face hurdles in being taken seriously and in gaining job experience, and women from particular ethnic tribes must address both global and cultural gender expectations.

Tourism products sold have an impact on the types of jobs available and market access for entrepreneurs. Within the tour packages and destination offerings of global firms, the products that are included or excluded have strong gender implications. Some tourism product destinations represent fewer opportunities for women than others, or have more negative consequences for women than men. For example, if beach resort, all-inclusive tourism is marketed, there may only be jobs available in designated female positions in hotels, more casual employment, and opportunities for sexual exploitation. Furthermore, if safari tourism is

promoted over cultural tourism, women may have limited job options beyond desk-based work in tour operator businesses because of gendered stereotypes of who can be driver/guides. Moreover, they face challenges in finding work at safari camps and lodges because of the remoteness and distance from their families. Conversely, with cultural tourism, they are typically better represented as entrepreneur performers, artisans, and providers of housing. Women can also become the product itself if an opportunity for sexual encounters is part of the image marketed or if women's appearance is used to sell the tourism experience, be it in a hotel, tour operation, or excursion activity.

Tourism Destination Firm Practices

Social norms are embedded in local contexts and influence which jobs and ownership opportunities are appropriate for female workers and entrepreneurs, possibly to a greater degree than the lead firm perceptions of gendered roles described earlier. Local gender constructs, that is, what jobs are deemed “men’s” or “women’s,” and overall notions of what women should or should not be doing, and how they are compensated, are deeply rooted in national and local contexts. Each country has its own gendered society that shapes the perceived appropriate gender social norms and practices. These norms dictate how firms make hiring decisions, if and how women have access to resources for tourism entrepreneurship, and if women should even be in the industry at all due to cultural assumptions made about service and notions of serving foreign men. This can be further unpacked by examining different identities such as ethnicity, religion, and age.

Supplier decisions made by national tour operators and hotels have an impact on female workers and entrepreneurs in similar ways to those of global lead firms. National tour operators and hotels have the ability to choose which suppliers they will use, and their decisions can increase both the casualization of labor if they push prices down and the number of gendered jobs if they choose excursions or activities that reflect gender bias. Simply choosing suppliers from their own personal and ethnic network (which, if it is based upon decisions made by a man, most likely perpetuates a male-centric business network) limits access for female entrepreneurs.

Institutional Practices

Access to international markets can be difficult for firms in developing countries, and even more so for female entrepreneurs, given gender-intensified constraints. The most successful tourism providers in destinations have direct access to international markets, either by traveling

directly to tour operator and travel agent offices in outbound markets or by attending international travel fairs. Women often face household constraints on being able to travel; they may have more limited ability to finance travel than their male counterparts; and, perhaps more important, they often lack the appropriate social networks to gain direct marketing access to global firms. Relationship building is a gendered phenomenon and tourism is about relationships and trust. Foreign operators must think that their destination suppliers have the right service capability to meet their international clients' needs. Many of the international travel trade shows are structured around powerful global tour operators, who already have established relationships with key destination operators, who are most likely to be male, and informal business often takes place in male spaces.

Marketing and industrial policies have multiple effects for female tourism workers and entrepreneurs. If one form of tourism is marketed over another, such as beach tourism over cultural tourism, women may find that there are only job opportunities at hotels as opposed to potential artisan, entrepreneurial, or home-based opportunities. Entrepreneurs can be linked to beach hotels as suppliers, but the barriers are high due to transportation and infrastructure challenges and hotels' demanding standards. Depending on the overall sector development policies that are typically formed in tourism ministries and their connected departments, female workers and entrepreneurs are profoundly impacted. The form of tourism promoted, the training made available, and the lack or presence of pro-woman business development strategies create varying gender outcomes for workers and entrepreneurs. So does the form of foreign direct investment (FDI) support for local content and domestic linkages.

Industrial associations can be male-dominated and thereby limit opportunities for female entrepreneurs. Industrial associations are critical regulators of standards, decorum, and marketing for destination tourism firms. These associations are usually run by men and composed of many male-run business members. Men will have a competitive advantage unless proactive policies are in place to support female entrepreneurship and upward mobility.

In addition, several constraints to female participation in the workforce affect tourism as they do most productive sectors. These constraints are vestiges of historical notions of the marginalized role women were expected to play in the economic activities. Below we highlight three of these constraints and note how they impact the tourism sector in particular.

1. Land and finance policies influence female entrepreneur competitiveness and the benefits gained from tourism development in local destinations. Tourism often takes place in remote, rural locations where women (wives, widows, and daughters) may be subject to customary land laws that impede their ability to become title deed holders. Without title deeds, they are often unable to use their land as collateral for loans to create businesses that cater to international tourists and/or ensure they can receive fees from tourism activity on private land.

2. Education and skill-attainment policies can impact how and if women have basic education opportunities, and if they have access to training programs. In many destinations, women are less educated than men and are hence less competitive as potential employees. Furthermore, if training, such as tourism certification and diploma programs, is costly, then male siblings may be chosen over females to attend school. In addition, without proactive gender strategies that reach out to women, few women are likely to receive training jobs that are traditionally considered masculine, like guiding and trekking.

3. Family and labor policies shape how all workers are treated in the sector but can lead to intensified constraints for female workers. National labor codes that do not enforce protections for casual workers or workplace conditions can affect seasonal tourism workers and foster abuses, such as long hours, overt discrimination, and sexual harassment. Limited or weakly enforced family policies that do not support maternity leave and on-site breast pump accommodations can further impact women. Employers may resist hiring or promoting female employees if they fear they will become pregnant or will be unable to work in remote tourism operations due to family responsibilities, or that they will be unable to work the erratic schedules required by the tourism sector.

Gender Impact of Economic Upgrading

The above practices along the tourism GVC have direct gender implications for economic upgrading. They represent the conditions necessary to upgrade and dictate who can participate. Together, the practices create gender constraints that can perpetuate gender inequality, but they can also help us to identify avenues to disrupt it. Through a gendered GVC framework it can be examined how gender dynamics play out as the industry attempts to upgrade. It is necessary to keep in mind that destinations may vary in how gendered roles and beliefs are interpreted, which may in turn result in different gendered outcomes to upgrading. We discuss various constraints and their implications in the context of upgrading in the distribution/excursion and accommodations/hotel segments below.

The gender implications and effects of functional upgrading in the distribution/excursion segment are diverse. Becoming a national tour operator may increase the number of women in the industry; however, they may be limited to office support jobs due to gendered job notions and may restrict upward job mobility for female members. Female entrepreneurs are less likely to upgrade with their own businesses because they are less likely to have access to international markets, education, and experience to meet international standards and may have limited access to finance. Within tour operations, women are less likely to be able to access higher-paying positions, such as drivers or guides, due to both gendered social constructs and the travel required to reach some tourism destinations, which implies time away from home responsibilities. Lastly, when a tour operator vertically upgrades and opens safari camps, women are unable to acquire jobs due to the distance to camps, the on-site living arrangements, and the gendered beliefs in tribal communities where camps are located that maintain female subordination.

The gender implications and effects for product upgrading in the hotel segment are also difficult to generalize. When a three- to five-star hotel opens, it may create jobs only in gender-segregated positions due to gendered job beliefs about housekeeping, gardening, or clerical work. The distance, location of hotels, erratic hours, and physical work, however, may limit young mothers and older women from migrating. In addition, the use of flexible labor can support hotels in the upgrading process because they can save costs, although it also can be an outcome of price pressures from global tour operators potentially leading to downgrading. Women are more likely to be used as flexible labor; being casual workers makes them vulnerable to poor working conditions and sexual harassment. Female artisans or vendor entrepreneurs may find it difficult as well to supply hotels due to standards and network access.

Women from particular ethnic and regional backgrounds may be better situated to upgrade, particularly if they have gained education and networks, and if they come from a privileged status group, such as foreign white female tour operators and business owners of African-Asian descent. Age and family status also intersects with gender, with single, young, childless women facing fewer constraints. However, their potential withdrawal from the labor force if they marry or become pregnant can exclude them from jobs and upward mobility, plus they face family pressures to remain close-to-home. Nevertheless, women who participate in cultural tourism where female roles are strong and pronounced can use their cultural capital to create unique tourism products.

Country Case Study: Kenya

Kenya is one of the oldest and best-established international tourist destinations in Africa. It has experienced strong growth since its independence in 1963 but has had periods of decline, notably 1995–2002 and 2008–09, mostly due to political instability. These variations are notable in statistical figures of visitors, GDP, and employment (see tables 3.2 and 3.3). According to the most recent results released by the Kenya Ministry of Tourism (MOT), the sector generated over US\$584 million (K.Sh. 48.5 billion) for the first six months of 2010, and was expected to reach over US\$1 billion (K.Sh. 100 billion) by the end of the year, contributing 11 percent of GDP. Considering that Africa is relatively marginalized in global trade, receiving approximately only 2 percent of global export receipts, it is clear that tourism is a leading source of export earnings for East Africa in particular (UNCTAD 2008).

The World Travel and Tourism Council (2012) reported that travel and tourism businesses in Kenya were bouncing back from the post-election violence of 2008. The sector supported 313,500 direct jobs in 2011 and is expected to employ 357,000 in 2012. Still, global tourism in Kenya is at a crossroads. Its mature market is concentrated on two main products—safari and beach; its tourism subsectors are fragmented; global tour operators play dominant roles; and a weak regulatory environment points to human-wildlife conflict management themes and greater development issues.

Institutional regulatory arrangements situate the overall tourism GVC in Kenya. Broadly, Kenya is labeled as “overburdened with institutions and regulations” within the tourism sector, with 44 different legislative instruments being used (World Bank 2010: 33). Tourism is somewhat unique in that policies on land use, environmental protection, and indigenous group rights take on importance, in addition to the traditional industrial policy base.

Table 3.2. International Visitor Arrivals in Kenya, 1995–2009

Year	Arrivals ('000)				
	Holiday visitors	Business visitors	Visitors in transit	Other visitors	Total
1995	795.7	100.5	55.8	21.6	973.6
1996	820.8	103.7	56.2	22.3	1,003.0
1997	804.8	101.7	72.3	21.8	1,000.6
1998	686.9	86.8	101.9	18.7	894.3
1999	746.9	94.4	107.4	20.6	969.3
2000	778.2	98.3	138.5	21.5	1,036.5
2001	728.8	92.1	152.6	20.1	993.6
2002	732.6	86.6	163.3	19.0	1,001.5
2003	684.0	182.1	219.1	61.0	1,146.2
2004	885.6	246.4	162.2	66.5	1,360.7
2005	1,063.2	206.1	79.8	129.9	1,479.0
2006	1,087.5	226.2	137.2	149.8	1,600.7
2007	1,278.5	242.2	130.9	165.2	1,816.8
2008	936.1	109.4	62.0	95.8	1,203.2
2009	1,061.2	180.6	98.4	150.2	1,490.4

Source: Kenya National Bureau of Statistics 2011.

Table 3.3. Kenyan GDP and Employment Figures, 1995–2009

	GDP (US\$ billion)	GDP (%)	Direct employment ('000)	Employment (%)
1995	0.56	6.2	229.2	5.2
2000	0.486	3.8	154.6	3.2
2005	1.032	5.5	259.0	4.6
2009	1.343	4.5	240.8	3.8

Source: World Travel and Tourism Council (WTTC) 2012.

The Tourism Industry and Economic Upgrading in Kenya

A broad Kenyan tourism GVC is depicted in figure 3.4. This chain is influenced by the outbound markets from which tourists originate and the arrangement of the global firms that are located there. Kenya’s largest source market is Europe, specifically, France, Germany, England, and Italy. The United States is Kenya’s second largest market. These markets exhibit different distribution channels (travel agents, tour operators, or independent) and types of tourist products (all-inclusive beach holidays, multicountry destination safaris, or multiregion packages in Kenya). Americans

typically favor multicountry trips and longer stays, while the French go for price and mass-market.

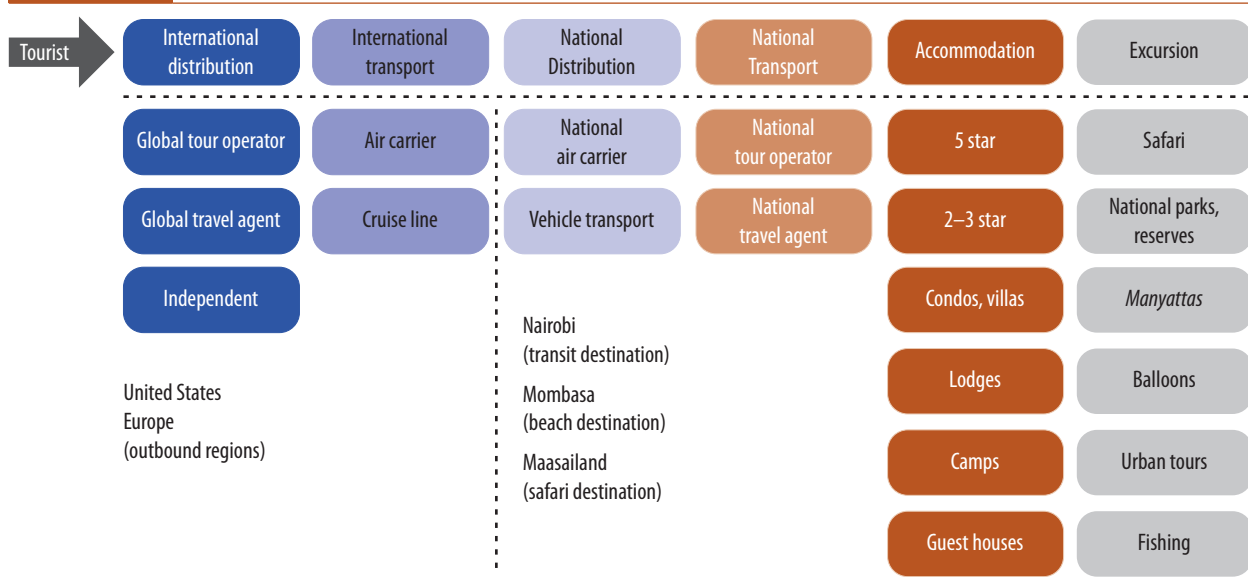
International Distribution

The international distribution category is represented by tour operators and travel agents from key outbound countries and the structure varies by region. Tour operators in the United States are usually smaller, not vertically integrated with other services such as international transport or lodging, and tend to have many niche-based tour operators. The European sector is larger. Tour operations represent part of the portfolios of large travel firms such as TUI AG or Thomas Cook. European clients have the opportunity to book all-inclusive packages, including air travel on tour operator-owned charter flights to Kenya. The number of tourists booking independently is growing but tends to be linked to particular countries, such as Dutch travelers. Even when tourists book through online travel agents, the process is still managed by large travel firms that own the online service and shape which providers have distribution options.

International Transport

Kenya has one of the strongest Sub-Saharan African airlines, with Kenya Airways providing international flights to London, Amsterdam, Paris, Rome, and some Indian and Chinese destinations. However, most international tourists arrive with international air carriers through agreed bilateral and alliance agreements. Kenya Airways has

Figure 3.4 Kenya’s Tourism Global Value Chain



Source: World Bank.

code-sharing agreements within their alliance partners of Air France and KLM. Kenya has been relatively successful within the African continent in providing an infrastructure flight platform for international tourist arrivals, but infrastructure issues for ground transportation within the country remain difficult.

National Transport

Due to the poor domestic roads, when international tourists visit multiple destinations within Kenya, they often travel by charter flights. Companies such as SafariLink have emerged to meet the demand, and some tour operators and local hotels have branched out into tour operations work in exclusive agreements with domestic air charters and/or began their own charter. Ground transportation services for tourists are usually part of the services offered by the national tour operators under the national distribution category. The strongest tour operators have multiple transportation fleets and operate in-house mechanic services.

National Distribution

By the end of the decade, there were approximately 2,000 Kenyan tour operators and travel agents, mostly based out of Nairobi and Malindi, north of Mombasa (UNCTAD 2008). Based on figures from the Kenya Association of Tour Operators, the gross annual turnover for their members is between below US\$140,000 (for Category E) and above US\$1.7 million (for Category A). All firms sell some form of a safari package that includes transportation, accommodation, guides, and food, as well as beach tourism packages. Many packages include both beach and safari combinations. However, there are significant differences in quality and form of products they offer. Several international tour operators have offices or subsidiary companies in Kenya, one of the oldest and most reputable being Abercrombie & Kent. A small number of foreign-owned, white Kenyan, and Asian Kenyan tour operations have the highest sales, and sell the most up-market and exclusive products. African Kenyan operations tend to be family-owned, and sell more basic products such as day safaris on less sophisticated transport vehicles. Many tour organizations are represented by the Kenya Association of Tour Operators (KATO). KATO Category A firms are those who have financial capital, marketing ability, and access to tourists, and usually they find some way to harness political and community support in gaining access.

Accommodation

Kenya's tourist accommodation sector is fragmented between five-star luxury offerings and one- and two-star

alternatives, and a range of products, including safari lodges and camps, guest houses in and around Nairobi serving as transitional lodging before and after a safari, and condos and villas for rent along the Mombasa coastline. The Kenya Tourist Board reported in 2006 a total of 174 hotels, including city hotels, vacation hotels, and lodges. Of those, only 17 were five-star. More recent bed occupancy figures from the Kenya National Bureau of Statistics indicate most bed occupancies for 2009 were located in Coastal beach areas (3,011,400) and Nairobi (1,164,100), although Kenya as a whole only had a 37 percent occupancy rate that year due to political unrest. The Central and Maasailand zones, which are dominated by game reserves, are also building their bed capacity.

The accommodation subsector has a range of ownership statuses, including foreign (13.7 percent), national (63 percent), and joint ventures (22.6 percent), and it contains franchise, management, or owner-managed operations (UNCTAD 2008). Following independence in 1963, European and Asian ownership of hotels gave way to a process of indigenous ownership through quasi-state organizations like the Kenya Tourism Development Corporation (KTDC) in collaboration with multinational brands to build, open, and manage new properties (Sindiga 1999). The Inter-Continental and Hilton were two of the first multinational hotel chains to come to Kenya. Although local ownership dominates today, there is still a perception that tourism is a foreign-run sector because many of the local owners are Asian and white Kenyans and there are small foreign investors who own single properties, as is common in Malindi, which has many German and Italian properties.

Excursions

Most of the excursion activities revolve around safari experiences in or around national parks and reserves, such as 4x4 driving tours, walking tours, or balloon rides. City tours, such as township tourism, are growing, along with activities connected to the beach (fishing, snorkeling, and bay cruises). Most safari activities are included as part of the tour operators' services, and beach activities are included in beach hotel holiday packages. Some tour guides are independent, mainly in the Mombasa city center for Fort Jesus and Old Town. Some independent safari guides work with national tour operators, but overall, there are few excursion-specific operators, with balloon rides and fishing being exceptions. Trips to cultural *manyattas*—Maasai centers, built following traditional layout and construction, where singing, dancing, and artisan crafts are displayed—are also popular, but they mostly rely on specific tour operators and camps (and their drivers) to bring in tourists.

Tourism Products

Most international tourists arrive in Kenya preferring to experience wildlife or have a beach holiday. The safari package becomes a broad category that can include both. The World Bank (2010) classified three distinct safari packages to Kenya that make up the bulk (80 percent) of all packages sold: (i) safaris concentrating on parks and reserves nationally; (ii) multideestination safaris that cross borders into other countries like Tanzania, Uganda, and others; and (iii) safari beach packages. Within this broad classification, safaris specialize (for example, photography, ethnology, or botany) and offer varying degrees of luxury and exclusivity.

The industry arrangements that connect these GVC subsectors together display key strategies that firms are developing to better control and streamline the tourist experience. Specific upgrading trends in the tour operator segment include the following: (i) Some national tour operators pursuing vertical integration and opening up their own private and mobile camps. The high end of this group is opening luxury camps that are part of private conservancies created through leased concessions, typically on Maasai land. (ii) Many national tour operators arrange safaris across East Africa and along the Indian Ocean, becoming a significant distribution channel for neighboring country providers. (iii) Foreign tour operators who send tourists to the Mombasa coast are pursuing low price points with accommodation businesses, mainly for the mid-range hotels, although better branded hotels have a stronger negotiating position.

In the accommodation segment, upgrading strategy trends are as follows: (i) The largest national hotel groups are beginning to expand into neighboring countries and into safari lodge and camp operations. They offer tour packages for the hotel guests based on their safari accommodations, and their safari accommodation offerings are also popular selections for national tour operators. (ii) Joint marketing initiatives of similar quality safari accommodations are creating shared distribution websites and selling arrangements with national and foreign tour operators. The trend is seen in both tour operations and accommodation providers. (iii) Corporate social responsibility initiatives, such as establishing trusts, foundations, or schools in local communities, are popular and becoming part of the typical tourism experience.

Gender Dimensions of Kenya's Tourism Industry

Kenya's gender context is shaped by regional and ethnic differences, family and clan arrangements, institutional

structures, and ideological beliefs that maintain the justification for the subordination of women. Notwithstanding the work of numerous women's organizations, a history of women's struggle against oppression and the attempt to outlaw gender discrimination in the constitution, Kenyan women continue to face gender-intensified constraints and are subject to overt discrimination that helps to perpetuate divisions of labor and lack of access to power, resources, and decision-making processes. Customary laws significantly affect women's ability to protect themselves against gender oppression and gain access and authority to the resource that most deeply shapes local life options—land (Ellis et al. 2007; Wamai 2009).

Within tourism, this has acute effects on women's ability to acquire capital to grow any form of business, as well as benefiting from the ability to receive fees from the development of tourism facilities on deeded land. With the boom of permanent camps, lodges, and private conservancies on former group ranches, negotiations with private tourism firms to develop partnerships are carried out by the Maasai men, and male-centered land control boards have wide discretion to decide which land transactions get approved. Maasai households are male-led and sex roles are sharply divided.

Overall, as with the rest of the formal economy, tourism work and business ownership is a male domain. Male labor makes up two-thirds of employment. Although there are women involved in all the subsectors and relatively widespread throughout the job classifications, women are outnumbered and excluded in other ways, such as key positions that are considered male, and access to tourists. Below we discuss the gender dimensions of economic upgrading among Nairobi Tour Operators and Mombasa hotels.

Nairobi Tour Operators: Gender Dimensions of Economic Upgrading

Economic Upgrading Trends

Overall, we can highlight six broad tour operator functional upgrading trajectories for national tour operators (table 3.4):

1. Guides who gain experience as driver-guides open their own businesses
2. Former employees of large, foreign, or white- or Asian-Kenyan owned tour companies who start their own firms
3. Travel agents who begin local ground operations
4. National tour operators focusing on Kenya-based products who start creating and selling regional tours
5. National tour operators who adopt vertical integration strategies and open their own permanent or mobile camps

6. In some cases, national tour operators who open private conservancies.⁵³

Trajectories four and five are a growing trend. The most successful of these tour operators are the KATO Category A companies. In addition to opening camps, many are pursuing private conservancies to guarantee exclusivity. Within these broad upgrading categories are embedded features, such as adding to the number and types of tours offered, (for example, ornithology or photography tours), or upgrading services, such as buying more and better safari vehicles. These upgrading trajectories have clear gender implications, which determine if women can upgrade with firms as entrepreneurs and workers.

Gendered Conditions for Economic Upgrading

Gender-intensified constraints to upgrading and gender outcomes for workers and entrepreneurs are described below. The conditions that lead to these constraints broadly shape the upgrading stages, but particular upgrading trajectories, such as vertical integration strategies, have specific gendered dimensions. Furthermore, individual identities, such as ethnicity, intersect with gender to both mitigate and deepen the results.

Figure 3.5 highlights two distribution channels for tourists to experience a Kenyan safari and the broad gender composition and constraints within those. The first channel, labeled “destination integration travel,” shows a tourist who buys a safari experience from a foreign tour operator, who in turn contracts out to a national tour operator who owns all the inbound segments, to plan and execute the trip. This national tour operator is an example of economic upgrading through vertical integration (upgrad-

ing trajectories five and six). By vertically integrating to become accommodation providers, national tour operators upgrade their offerings to, and thus increase their leverage with, the global firms. This appears to be a growing upgrading strategy in safari tourism markets. This upgrading has principally been achieved by male national tour operators given the gender-intensified constraints female entrepreneurs face to entering and upgrading in this business segment, and it creates gendered job outcomes at accommodation facilities. In the second channel, labeled “destination-led travel,” a tourist purchases a safari package from a national tour operator who owns everything except accommodations (upgrading trajectories two, three, and four). In this channel, there is no international tour operator intermediary between the tourist and the national tour operators and accommodation providers.

Both distribution channels exhibit similar gender dynamics. Along every segment of the chain, we see gendered employment compositions and constraints that shape the ability of women to upgrade as entrepreneurs and workers and the gendered outcomes between men and women in job availability and working conditions.

Global lead firm practices:

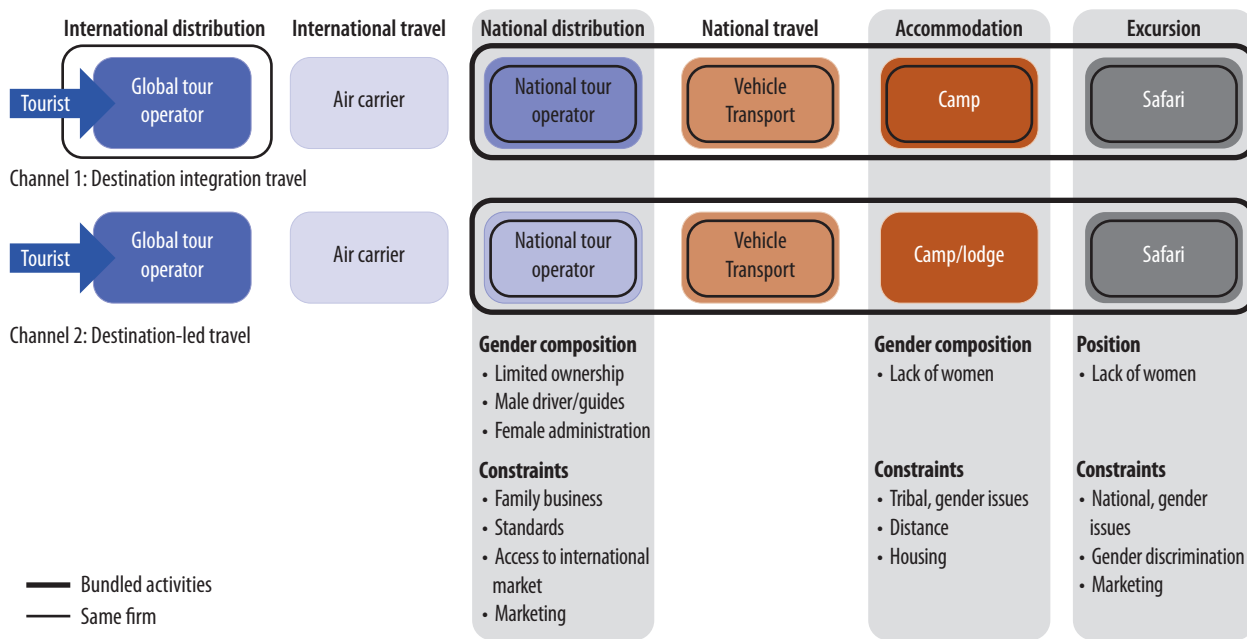
Standards of foreign tour operators impact the opportunities for female tour operators. Many Kenyan tour operators rely on foreign tour operators for 50 to 95 percent of their bookings. Foreign tour operators have a series of standards that they expect their ground handlers to meet. These standards include large insurance policies, the standards of their accommodation suppliers, the quality of their guides, and a larger “service” or “customer focus” standard that is particular to the tourism industry. The large national tour operators who are predominantly owned by white and Asian Kenyans typically meet these standards. Because many have family histories linked to outbound destinations, they are presumed to know what service standard international tourists want. Most of these companies are male owned. We were only able to identify two of a total of 31 Category A KATO tour

Table 3.4. Kenyan Tour Operator Upgrading Trajectories

(1) Guides → national tour operator
(2) Worker at foreign/white Kenyan owned tour operator → national/regional operator
(3) Travel agent → national tour operator
(4) National tour operator → regional/global tour operator
(5) National tour operator → open camps
(6) National tour operator → open camps, private conservancies

Source: World Bank.

⁵³ As early as 1999, there were as many as 25 private conservancies in Kenya (World Bank 2010). Since then the number has continued to grow. The early movement toward these community-private initiatives came from the Parks Beyond Parks program in the Kenya Wildlife Services, where permission was given to set up camps and tourism-related activities in the areas around the national parks and reserves (Rutten 2007). It was intended to encourage the local pastoralist communities to pursue wildlife conservation for economic benefit. Land is typically put into a collective unit, if not already part of the group ranch system, and the operator leases the area where accommodations will be constructed and pays bed night and monthly fees to the community.

Figure 3.5 Gendered Safari Distribution Channels

Source: World Bank.

operators that were female owned and led: one is of Asian Kenyan origin and the other is African Kenyan. The African Kenyan owner gained experience as an account agent for her family's tour operator business, but her partnership (and marriage) to a white Kenyan with his own excursion operations considerably facilitated upgrading.

Access to international markets is limited for female tour operator entrepreneurs. Access to international outbound markets is one of the most significant factors shaping a firm's ability to upgrade and receive bookings. For African Kenyans, gaining international access is a steep hurdle because of the cost of traveling to outbound markets to meet directly with international travel agents and tour operators. Again, many white and Asian Kenyan operators had this direct international access link and were well represented at international trade shows and/or had long established relationships and often direct sales agents in outbound markets. The demonstration effect of working for these operators, gaining access to their clients, and literally marrying a foreign partner with financial resources were avenues to gain international access, which both male and female tour operators employed, but women faced greater intensified constraints.

Female operators were more likely to have limited financial resources due to their weaker ability to obtain loans, so travel abroad for direct marketing was more diffi-

cult. Care and financial responsibilities plus gender expectations at home further constrained the access of mothers and young female entrepreneurs to international markets. They were simultaneously expected to get married, watch their children, and financially support extended families, leaving them little to invest. As women, they also lacked the same access to international networks that many men operators have. Furthermore, these networks can be hard to break into for women, particularly if they do not meet the right "image" of a safari operator (see below).

Marketing and products sold by global lead firms can create gendered jobs and limit female artisan entrepreneurs. The image, the feel, and the experience they market are commonly gender biased. To evoke a particular visceral reaction and a consumer's desire to buy their product, foreign operators use imagery and narratives. The safari product in East Africa, particularly in Kenya, is a very gendered and in some ways racial phenomenon. A romanticized colonial safari experience personified by the imagery of the "white hunter," represented by such historical characters of Finch Hatton and immortalized in Karen Blixen's *Out of Africa*, dominate the marketing landscape. The marketing of the Kenyan safari experience is fixated on these early hunter safari experiences, and many camps are named after the once famed hunters. This safari scenario is thus highly masculinized.

Given the dominant focus on the safari experience tour, few tour operators market other tourism products. For example, little attention is given to Kenya's potential for a vibrant cultural tourism experience. This would favor the female-led tourism cooperatives, which include artisan handicrafts and traditional dance and food.

Tourism destination firm practices:

Social norms, local contexts, and gendered tour operator jobs constrain tour operator workers in offices and camps and limit chances of successful entrepreneurship. Most national tour operators have distinct gender compositions within their businesses. Young women primarily hold jobs as ticketing agents, client representatives, tour consultants, and office receptionists and men still outnumber women in the offices. Some offices have women in management and higher support positions. Many of the smaller operators that are African-Kenyan owned and run are family businesses where the father, brother, or husband takes on the highest role. Other family members are support staff. The family-based ownership structure can also limit the ability of women to get placed as interns or “attachees” since family labor is used.

One of the most fundamental positions with tour operators is the driver/guide. As noted, this is a highly masculinized job. Men are perceived to have the appropriate characteristics to be driver/guides. They can operate off-road vehicles, can fix and maintain the vehicles, have the physical strength to lead trekking, and are deemed more appropriate to lead expeditions. It is extremely hard for women to become part of this group in Kenya. There are remarkably few female driver/guides. None of the 11 gold-certified guides with the Kenya Professional Safari Guides Association (KPSGA)⁵⁴ are female and only six female silver-certified guides exist, all of whom are of European or American background. Of the eight female bronze-certified guides, one is African Kenyan Maasai, the first female graduate of the Koiyaki Guiding School.

Few African Kenyan women have been successful in overcoming the gender-intensified constraints in the guide/driver role. Operators doubt their abilities to work for foreign contractors, particularly as mountain guides. If women want to work their way up the guide ladder in mountain trekking, the accommodations on the mountain for porters do not support gender differences, and women can face harassment from their male colleagues. These women are often subject to harassment from both their colleagues and families, who tell them they “should get married,” “come back with their husbands,” or who assume they are doing something impure. In addition, they are sometimes forced to pay more in licensing fees. Within their families, they might also receive limited support

because they are challenging established gender norms. Other overtly gender-discriminatory challenges arise when they negotiate for permission to set up permanent and mobile camps with ethnic tribal communities that are traditionally patriarchal. Consequently, the upgrading trajectories of becoming a mountain or safari driver/guide and then starting their own tour business and opening camps are limited pathways for women.

Furthermore, workers who are employees at camps owned by tour operators face gender job constructions, especially local Maasai women. Many camps have an almost entirely male staff. Both overt and unintentional gender discriminatory practices perpetuate this. The distance of the camps in remote locations does not help women who have family responsibilities and are also expected to stay close to their families. The staff housing accommodations are not designed to meet the needs of women for privacy from male staff. Women who do work at camps also may have to contend with gossip and innuendo about their “reputation” for working at such a place.

Both male and female Maasai are at a disadvantage for employment at camps due to their extreme lack of education, where the average may be only a year-and-a-half of schooling. When local hiring conditions are built into leasing contracts with Maasai, those jobs mostly go to males but typically in the low-skill positions. Maasai women are more likely to work as artisan jewelry makers and cultural performers, but even with this, they must share their income with their husbands, *manyattas*, and driver/guides. Hence, when national tour operators upgrade through vertical integration, African-Kenyan and Maasai women are less likely to get jobs than their male counterparts.

Institutional practices:

Industry associations influence the success of female tour operator entrepreneurs. KATO is the private tour operator regulating body. Tour operators must apply for membership, go through an application process, and spend time as an Associate Member. Member categorization, based on annual sales, ranges from A to E. KATO plays a vital role as the voice of the subsector and helps organize familiarization trips and provide marketing access. Because the subsector is male-dominated, it is important to determine how they market their members and which members have access to international networks and government bodies, all of which could have gender dynamics.

⁵⁴ The KPSGA is a volunteer regulating organization that works in collaboration with tourism-related ministries and county councils to set the standards for safari driver guides.

Land policies and access to credit and training schools impact entrepreneurs and workers. Land policies and access to credit and training schools are conditions that shape upgrading trajectories with gendered consequences. Land policies overtly disadvantage all women through the exemptions that exist for customary laws, which impedes their access to title deeds and, thus, to collateral for loans. Customary laws protect the various traditional tribal customs and are based on patriarchal traditions and beliefs on distinct differences between men and women as it pertains to roles, rights, and expectations (Ellis et al. 2007; Wamai 2009). Without access to land, Maasai women do not receive direct fees from tourism development on Maasai land. They are less likely to benefit from fees from conservation and leasing agreements, becoming private deed holders is difficult, and they are excluded from the negotiation and information process of the elder Maasai leadership who work with the private tour companies (Homewood et al. 2009).

Moreover, it is becoming more expensive for Kenyans to receive the training they need through the numerous accredited training schools and more difficult to get attachments (internships) and permanent positions. It costs close to US\$1,200 for a year-and-a-half Travel Operations certificate from Utalii College. Some Kenyan families take out loans for the college that they cannot pay back, which creates an intensified gender constraint, because it is harder for women to find jobs, so repayment is especially difficult.

Mombasa Beach Hotels: Gender Dimensions of Economic Upgrading

Mombasa is a tourist destination of contrasts. It is one of the country's poorest provinces with 57.6 percent of households living below the poverty line (Kenya National Bureau of Statistics 2005). From as far north as Lamu Island to the South Coast shoreline, the Mombasa coastline has been a mass tourism product since the early 1960s. Tourism development with large hotel projects evolved in an unmanaged and unregulated manner. Today, the Mombasa tourism experience is highly restricted. Visitors are transported to their hotels via ground operators, who collect them from mostly chartered flights, and they remain at the hotel except for organized and controlled excursions to Old Town, Fort Jesus, Haller Park, or on a weekend safari expedition (Akama and Kieti 2007). Hotels are mostly luxury and offer a range of packages, including B&B, half board, full board, or all-inclusive. Global tour operators largely arrange these packages.

Economic Upgrading Trends

In table 3.5, five upgrading/downgrading trajectories are identified. A common form is for hotels to expand their bed

count and their facility offerings, for example, by adding a gym, a lounge, or new pool. This trend is becoming increasingly difficult due to price pressure from above. The second trajectory represents a strategy to cater to new international visitors, such as conference and business visitors, to offset the seasonality of tourism and the price pressures of global tour operators. The third and fourth trajectories represent an elite group of hotels that have begun to either expand their functions to open their own safari camps and tour operations or add to their locations. The last is an example of downgrading, when a strong hotel sees its product deteriorate due to wear and age or a hotel is even forced to permanently shut down. Both foreign and Kenyan-owned hotels are all experiencing these upgrading/downgrading processes.

Gendered Conditions for Economic Upgrading

A series of conditions support upgrading/downgrading. Embedded in them are practices that can produce firm-level downgrading and/or social downgrading for workers. As with the Nairobi national tour operators, there are distinct gender dynamics, but some of the issues on the Mombasa coast highlight the precariousness of all hotel employment and the vulnerable position it puts women in. Barrientos et al. (2010) note that economic upgrading can mean simultaneous social downgrading for workers or for particular categories of workers. When we unpack these conditions in Mombasa tourism, we can see the gender implications and outcomes for hotel workers and entrepreneurs indirectly attached to the hotel.

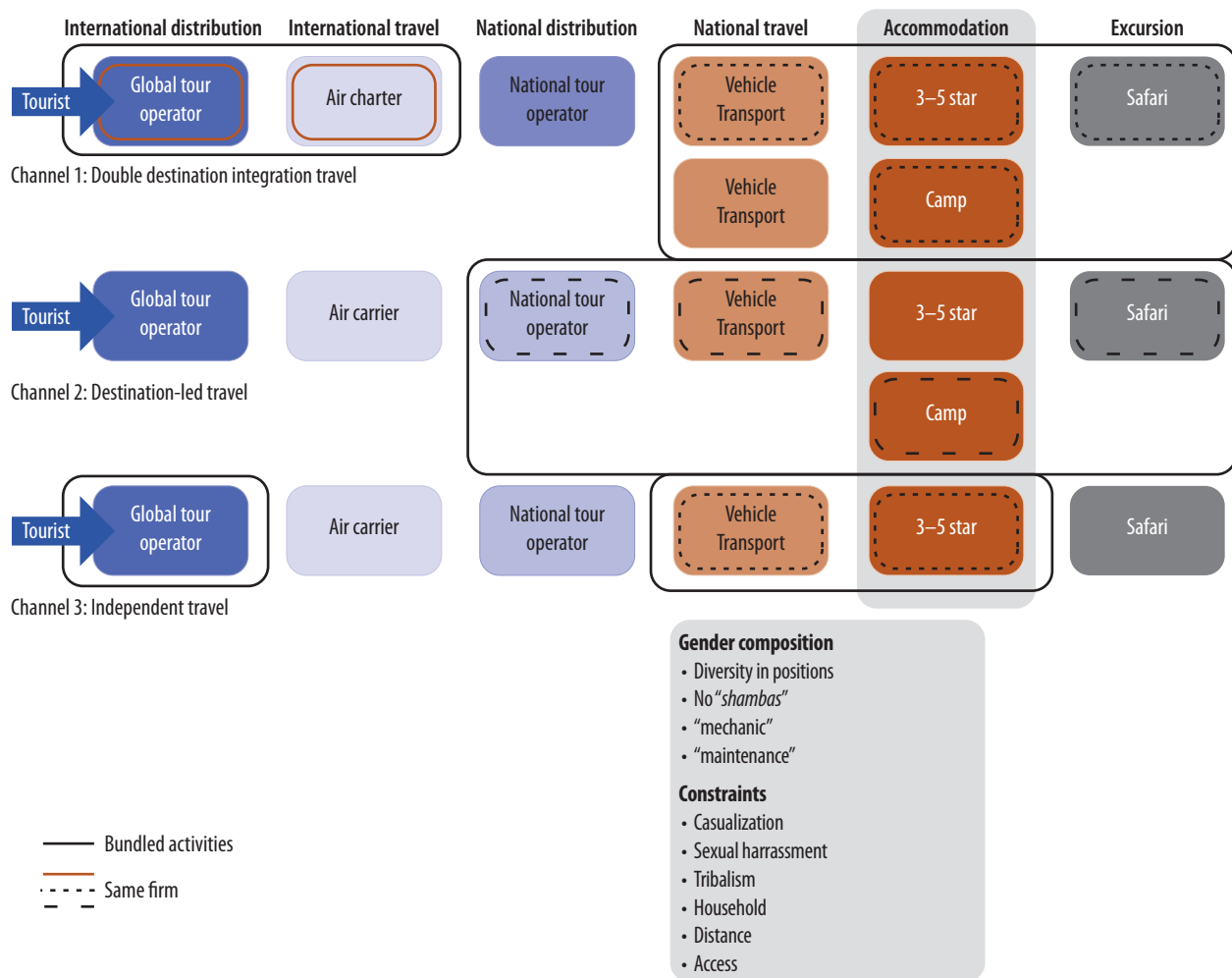
Figure 3.6 highlights three different distribution options for Mombasa hotels: (i) booking with a global tour operator that has its own air charter and uses a hotel that also offers a safari camp, "double destination integration travel"; (ii) booking directly with a national tour operator

Table 3.5. Beach Hotel Upgrading/Downgrading Trajectories

Upgrading/Downgrading Trajectories

- (1) Beach hotel → Expand/renovate their facilities
- (2) Beach hotel → Expand tourist market
- (3) Beach hotel → Open up camps/tour operations
- (4) Beach hotel → Expand number of hotels
- (5) Beach hotel ← Deteriorating facilities/closes

Source: World Bank.

Figure 3.6 Gendered Mombasa Hotel Distribution Channels

Source: World Bank.

that has a Mombasa hotel component as part of a safari tour package, “destination-led travel”; or (iii) booking via an online travel agency, “independent travel.” Regardless of the distribution channel and relationship between tour operators and hotels, all accommodation providers have employees with similar gender composition, and all use a mixed labor strategy with gender effects. Workers at hotels facing price pressures from tour operators, however, may be more likely to work under gender-differentiated conditions than if they work at hotels that have more bargaining leverage.

Global lead firm practices:

Pricing pressures can shape labor arrangements for hotel workers. The World Bank’s (2010) detailed study of the price breakdown among the components of various package arrangements from outbound markets to Mombasa

exposed the challenge that many mid-range hoteliers have when negotiating with global tour operators and charter air services. They note that for a nine-day, seven-night full board beach package, the hotel must cover all costs, including overhead and profits, for just US\$55.71 per person per bed night, and they estimate that to break even, hotels must have a seven-month, 65 percent occupancy rate.

The dominant European global tour operators leverage economies of scale for high-end hotels and push down occupancy rates for mid-range hotels. Because the Mombasa coast competes on price in the beach mass tourism market, many suppliers have limited bargaining power. The 11 top tour operators operating with coastal hotels cumulatively represent only three global travel firms—TUI Travel, Kuoni, and REWE. These companies have multiple destination offerings with Kenya, as with other popular tourist locations. If one hotel does not meet

Table 3.6. Categories of Workers in Kenya

Form of employment	Duration	Benefits	Wages low skill	Informal tips
Permanent employment	Permanent	S, H, A, U	K.Sh 10,000 month, K.Sh 350 day	x
Contract employment	3–6 months	S, H, A, U	K.Sh 5,763 month	x
Casuals	Day, week	None	K.Sh 140–350 day	x
Attachments	3–6 months	None	0	x

Sources: World Bank field notes, interviews, and the KUDHEIHA hotel workers union collective bargaining agreement.

Note: S = service charge; H = housing allowance; A = annual living increase; U = union participation

their price needs, there are several to choose from, or they can turn to another regional destination.

Increased price pressure encourages the casualization of labor beyond the casualization that exists due to seasonality.⁵⁵ There are typically four categories of hotel workers in Kenya that are differentiated by the duration of work and forms of compensation and social protection (see table 3.6). Permanent and contract employees receive a service charge, (that is, tips), housing allowance, and can potentially get an annual cost of living increase along with union representation, in addition to their relatively low base wages. Casuals receive a daily wage rate that is paid out to them daily or weekly. Attachments (interns) come directly from training schools and are a source of free labor.

Different hotels have various labor structures, but a common trend for all is to mix of permanent, contract, and casual laborers. The number of contract and casual workers increases during the high season, and almost all contract and casual employees lose their jobs at the season's end. Casual employees often stay in that state more or less permanently, although they are legally deemed not casual once they work longer than a month; numerous workers have casual status at the same hotel for years. Furthermore, once a contract is over for a contract employee, it is common, particularly if there is a seasonal break work, for the contract worker to start over in the new season as a casual worker before they are awarded a contract.

The divisions between categories of workers have particularly troubling effects on women. Men overall outnumber women as hotel employees. Women are more likely to be casual workers due to the gender-bias built into some hiring mechanisms, such as not wanting to hire permanent female workers who then would be eligible for maternity leave, or when hotels are located far from family homes in

the up-country. Moreover, women suffer disproportionately as casual workers, because they are vulnerable to intimidation and sexual harassment in the hiring and promotion process; contract or permanent status is promised if they succumb to sexual advances. For female workers who fight the harassment, their working conditions can become unbearable. Increased workloads, inconvenient hours, night-shifts, and complaints made to higher management about their performance can lead to their being fired or forced to pay a bribe, a “*kitu kidogo*.” The sense of shame and psychological duress can be devastating.

Standards that differentiate regional hotel lead firms have mixed impacts on hotel workers. While the mass-market, mid-range hotel product has had many upgrading challenges, several hotels have been able to position themselves outside the mid-range crowd by improving their product with additional beds and services, horizontally integrating by opening new facilities in neighboring countries, or vertically upgrading by launching tour operations and safari camps. These hotels separate themselves by the service they offer and the branded they create. Some have expanded their product by increasing business and conference tourism to the area.

These are examples of hotel upgrading that have risen above the tide of mid-range hotel stagnation. The gender implications and consequences are mixed. The Serena, Sarova, and Severin are considered the best hotels to work for on the North Coast. They provide training, pay

⁵⁵ The Mombasa coast hotels already suffer from seasonality and unpredictable crises that influence outbound tourism and labor arrangements. The weak financial situation for many hotels forces them to find ways to save costs. Labor becomes one of those ways.

standard wages or more, and employees receive added incentives, like higher service charges. However, these hotels also employ a multitiered labor strategy. Thus, while one group of workers receives better pay and conditions, the nonpermanent group has uncertain employment. On the other hand, those hotels that have upgraded are at lower risk of economic downgrading.

Tourism destination firm practices:

Social norms and local contexts shape gendered hotel jobs for workers. While the price pressure from global tour operators helped set the trend for the casualization of labor, the Mombasa hotels are responsible for implementing practices that create gender divisions. Interestingly, hotel workers are mostly men and job segregation is limited. Both men and women work as housekeepers, laundry workers, and front office clerks. There are women in management roles. Yet, in certain categories, such as *shambas* (gardening) and facilities maintenance, the workforce is almost completely male. The dominance of male workers may reflect easier male migration to the Mombasa coast, the lack of adequate family housing, and local context issues, such as women staying in the household.

Transportation, household needs, and tribalism impact hotel workers. The lack of a feminized hotel workforce does not preclude the larger issues that female hotel workers face, such as the already discussed concerns around sexual harassment. The transportation and unique household needs of women, along with tribal discrimination, all point to gender-intensified constraints for women. Hotel housekeeping is physically demanding, and the hours are long and erratic. If women are casual workers, this is heightened. Many hotels provide transportation but only to specific locations. Female workers still have to walk home and are vulnerable to attack. Moreover, females who are the sole or the main income earner for their families and are stuck in casual employment, have difficulty maintaining their extended households. Additionally, they are more likely to work to support their brothers if they are chosen to go on with education and to support their parents in old age. This extended household support is on top of their direct household needs. Moreover, many casual workers live in the village communities surrounding the hotels that lack the most basic services, like clean running water and sanitation. They are unable to meet all their burdens and have basic, humane living quarters. Lastly, discrimination based on tribe, like sexual harassment, is an unspoken reality for many workers. Tribal backgrounds keep potential employees from networks to access jobs or are used against them.

Sex tourism can be inadvertently supported by hotels; thereby affecting hotel workers, commercial sex workers, and children. A hotel's response to and/or policies regarding sex tourism and child sex tourism have gendered outcomes and can be used to separate them from their competitors. Sex tourism in Kenya is not solely a female domain (Kibicho 2009), nor is it limited to the adult population. ECPAT (2008) calls Kenya an emerging child sex tourism location with potentially between 15,000–30,000 child victims. While it is impossible for hotels to monitor the intentions of all of their guests, they can introduce proactive policies that discourage exploitation and monitor ways in which employees may be inadvertently supporting it. Both men and women are impacted, but women are more susceptible to the abuse because of their vulnerabilities. Younger women face being pushed into work roles to support parents and siblings or being forced to leave their households.

Access for local artisan groups/vendors to hotels is significant for entrepreneurs. How hotels choose to procure the artisan crafts sold in their gift shops, which groups they allow to perform for their guests, or which vendors they allow to sell their crafts in beach markets have gender implications and outcomes for independent workers' ability to upgrade. The independent worker category itself is gendered, and men and women fill different roles. For example, men are the "beach operators" and "beach boys," while women are part of the growing women's artist collective groups along the coastline. Certain "lucky" operators get access to sell their goods inside the hotels on designated days. These operators are commonly men. Women are able to sell their goods to hotels only if they are able to establish a relationship with key hotel intermediaries, and if they are able to get transportation to hotels. Transportation affects both men and women, but many women's collective groups are far from hotel sites. Moreover, a crucial factor is if the hotel deems the products women's groups sell represent the cultural they think tourists want. This typically involves the promotion of the Maasai.

Institutional practices:

Training and labor codes affect tourism workers and entrepreneurs. The quality of schools and training, labor codes, and corporate laws are critical factors shaping upgrading trajectories. They also have different gender effects. There are numerous training and certificate programs in tourism in Kenya that are offered by several tourism training schools, and obtaining a certificate, even for low-skill work like laundry and housekeeping, is increasingly necessary. Enrollment in courses for the various forms of tourism work is mostly balanced between men and women, as is seen in

Table 3.7. Kenyan Tourism School Course Enrollment by Gender and Year

Courses	Male	Female	Total
Hotel Management (2008)	19	13	32
Travel and Tourism Management (2009)	15	13	28
Travel Operations (2009)	6	4	10
Tour Guiding (2009)	12	7	19
House Keeping and Laundry (2009)	7	26	32
Front Office (2009)	15	26	41
Food Production (2009)	16	16	32
Food and Beverage Advanced (2009)	16	15	31
Food and Beverage Basic (2009)	51	67	118

Source: Anonymous school figures.

table 3.7 for one of the top tourism schools, although more women are enrolling in housekeeping courses.⁵⁶

However, these figures do not reflect the long-term success of male and female students. An instructor at the school noted that in a hotel management training program where roughly 50 percent of the students were female, only two women were successfully placed. Women faced challenges, such as the distance to the hotels compared to where their families lived, the ability to move and work at different hotels based on the decision of high hotel management, and pressure to stay with their families.⁵⁷ It was also suggested that when women went out for attachment interviews, some were not hired due to their appearance. Hence, training women equally to men does not guarantee equal opportunities for success.

The labor code in Kenya is relatively well established compared to other developing countries, and there is a long history of trade union activity. The hotel workers union (KUDHEIHA) has years of collective-bargaining agreements with the Kenya Association of Hotelkeepers and Caterers. However, while maintaining a stratified labor force of permanent, contract, and casual workers to save costs is permitted by the labor code, the large number of casual workers do not have access to unions nor support to lodge complaints. The provisions against sexual harassment, and, to some extent, the strengthened

labor code for mothers, have not helped female hotel workers. The Employment Relations Act of 2007 outlines what is sexual harassment but leaves out proper recourse measures and enforcement. Similarly, the strengthened maternity leave clause, without affirmative gender hiring strategies, can push employers not to hire women. One hotel manager stated that he sees that as an upcoming trend. This helps to maintain a dominant male workforce and an environment for gender discrimination.

Policy Recommendations

Specific policy recommendations at different levels and segments of the value chain, if implemented, may help create gender equity, reduce gender constraints, and foster competitiveness and economic upgrading in global tourism value chains. The policy goals should be to further economic upgrading, secure equal access to the benefits for both men and women, and create a gender-inclusive and sensitive work and entrepreneurial environment. Policies should follow the agenda of the ILO's Decent Work initiative, which fosters expanded paid work, guaranteed rights, core international labor standards, extended social protection of fair compensation and working conditions, and the promotion of social dialogue. In particular, the policies recommended below proactively address how female subordination is structurally situated inside and outside the household. Without direct policies at multiple levels, gender inequality will continue. These policies are geared toward multiple stakeholders, such as global and national lead firms and tourism and trade ministries or departments. NGOs and multilateral organizations also have roles to play.

Lead Firm Policies

Leverage global tour operators and global hotels and brands: Global tour operators and hotel brands through their buying and brand power in destinations can influence suppliers down the supply chain to implement pro-gender employment, market access, and anti-sexual harassment policies. Box 3.1 describes the Tour Operator Initiative in Europe to improve the social, cultural, and environmental aspects of European tourism supply chains. At the local level, pressure could be applied through leading industry associations, such as KATO, to implement similar practices.

⁵⁶ This may be a trend toward a feminization of housekeeping work that may change the current nonfeminized workforce.

⁵⁷ Internal transfers among management are high—one male hotel manager in Mombasa had spent time at five different hotels across East Africa.

Box 3.1 ■ European Buyers Promote Equitable Practices through Supplier Accountability

In Europe, the Tour Operator Initiative (TOI) “consists of a commitment by tour operators to be accountable for the social, economic, and environmental consequences of the supply chain” (TOI 2004: 3). Several multilateral organizations are involved in its sponsorship, including UNWTO, UNESCO, UNEP, the World Wildlife Fund, and Conservation International, and prominent tour operators, such as TUI AG and Thomas Cook. The tour operators involved promote best practices and guidelines for tour operators to follow to integrate sustainability throughout their supply chain. Their definition of sustainability is comprehensive and includes economic, social, cultural, and environmental aspects. Brand sensitivity and the push toward responsible tourism create incentives for global lead firms to ensure their suppliers and destination locations follow best labor practices and promote gender-sensitive policies. TOI highlights best practices by member operators and through their cooperation with destination communities, they have brought diverse stakeholders together to create and begin practices that address topics such as creating stronger linkages with local communities, capacity building, and environmental protection. Destinations they have worked in include Side, Turkey, and Salvador de Bahia, Brazil.

Source: World Bank.

Monitoring, certification, ILO/International Finance Corporation (IFC) Better Work: Lead firms can be encouraged to adopt third-party monitoring of suppliers in destination locations. The ILO/IFC is contemplating a Better Work inspection programme for tourism. Better Work aims to improve compliance and labor standards in global supply chains with the goal of increasing firm competitiveness. They have programs and services in the apparel sector of Vietnam, Cambodia, Indonesia, Nicaragua, Jordan, Lesotho, and Haiti. This framework could be a platform for buyers, suppliers, and states to come together to promote core labor standards and anti-discrimination for women in tourism. Although new standards can be developed, an existing range of certifications in the tourism sector, particularly those focused on social and environmental sustainability, could be expanded to include gender equity (see box 3.2). By adopting monitoring and certifications, lead firms could market their compliance status and help their bottom line. In a report commissioned by the Netherlands Development Organization (SNV), the Center for Responsible Travel (CREST) argues that responsible tourism has done slightly better than the

tourism industry as a whole during the economic recession. Several global trends support the finding, such as increased Internet bookings, the growth of online travel communities, and the “increasing consumer demand for travel that offers authenticity, connections with nature, environmental stewardship, and personal growth” (CREST 2009: 8).

Support for Pro-Poor Tourism in Practice programs:

Pro-poor Tourism in Practice was a program run by the Overseas Development Institute with financial support from the Business Linkages Challenge Fund of the UK’s Department for International Development and British Airways. The pilot project worked with five private South African tourism partners to encourage the creation of local linkages in their supply chains. The project had mixed success but served to highlight the importance of local linkages and corporate responsibility (Ashley 2005). A similar collaborative project could be sought in other destinations, but with a clear gender-sensitive agenda that acknowledges how gender relations and inequalities are exhibited locally.

Destination Firm Policies

Community-based tourism dynamics: National tour operators play key roles in destinations. Like global tour operators, they choose local suppliers, and as shown in Kenya, many of them are beginning to vertically integrate to become suppliers as well. They can encourage their suppliers to hire women in key employee roles. Moreover, when the operator opens up their accommodation facilities in community tourist destinations, they should pursue similar

Box 3.2 ■ Certification Programs Signal Pro-Gender Practices

Fair Trade Tourism South Africa is the first organization to implement a fair-trade certification program for the industry. Fair Trade Tourism criteria include fair wages and working conditions, fair purchasing, fair operations, equitable distribution of benefits, and respect for human rights, culture, and the environment. To date the organization has certified 45 tourism firms in South Africa and has relationships with 50 global tour operators. Other developing countries, such as Costa Rica and Kenya, began their own voluntary certification programs for eco-tourism that could be modified to include gender-sensitive indicators. The Costa Rican Tourism Board runs the certificate in sustainability, and Eco Tourism Kenya, an NGO, promotes a certificate-monitoring program with goals that include strengthening female community organizations.

Source: <http://www.fairtourismsa.org.za/>.

pro-female hiring strategies and provide the appropriate structure to accommodate them (including appropriate working hours, on-site private accommodation, and so forth). Furthermore, all destination firms can be encouraged to hire women in important roles, particularly roles from which they are typically excluded, such as safari drivers or guides. Without a proactive strategy to purposely hire women in non-feminized positions, it will be difficult for women to break the gender barriers.

In addition, when working with conservancy projects, domestic firms should be encouraged to request that female community members be part of land lease and tourism development contract negotiations. These requests can be made in a culturally sensitive manner that does not offend communities, possibly by using members from the community who are already sensitive to gender matters to make the request. Box 3.3 highlights the gender-equity approach of an established camp in Kenya.

Strive to enforce anti-sexual harassment and minimize discrimination in training and promotion: Sexual harassment impacts not only the employee but also the firm's profitability due to increased absenteeism and attrition, a decline in productivity, and increased cost of training new employees. Many destinations have anti-sexual harassment policies, but they are weakly enforced and information about them is not disseminated. Kenya, for example, requires employers with 20 or more employees to have a policy statement on sexual harassment, but this rarely happens, and if it does, employees do not know how to report harassment in a manner that protects them. Awareness of these

Box 3.3 ■ Karen Blixen Camp Changing Perceptions on Gendered Roles

The Karen Blixen Camp in Kenya takes a strong gender-sensitive position by promoting gender equality in hiring, promotion, and working practices, and work conditions are good for all employees. While still a long way from gender balance amongst employees, often due to a lack of female candidates, the company has women working as both safari drivers and spotter guides. All female employees are permanent or contract employees and are given three months maternity leave. The camp chooses not to hire casual workers, because as they write on their website, "it renounces job security, social rights and medical benefits." The camp is part of the Mara North Conservancy, and female cultural and economic empowerment is central to the organization's initiatives to strengthen the local Maasai communities.

Source: <http://karenblixencamp.com/>.

policies should be highlighted in new employee induction training, as well as ongoing training.

Indeed, ongoing training in new tourism skills is a vital part of continued education for tourism workers. As technology and trends change, keeping ahead on training is essential for employees to upgrade into higher-skilled jobs. Many firms send their employees to either private or public courses. Women, unfortunately, have often been excluded from access to these programs. They should be equally represented in these courses and proactively encouraged to attend them.

Incorporate culturally diverse products: Culturally diverse products can be put on tour operator itineraries or promoted and sold at accommodations. Tour operators and hotels can include products that support female tourism community groups among their offerings. For example, the Agape Women's Group, with support from the Netherland's Development Organization and the Tanzania Tourist Board, has created cultural tourism products to add to traditional safaris and have established linkages with safari lodging facilities. Hotels should be encouraged to partially source their local gift shops with artisan products directly from female-led artisan collectives, as is described in box 3.4. Also, they could devote specific days of the week/month to artist days with an emphasis on female artists. Hotels can work directly with national NGOs, such as Ecotourism Kenya, in identifying collectives and in training female artisans to meet whatever standards the hotel may have.

Box 3.4 ■ Starwood Hotels and Mayan World Foundation Purchase Crafts from Female Artisans for Hotel Decorations

Through a joint venture in Mexico, Starwood Hotels and the Mayan World Foundation developed a program to support local craftsmanship in areas around the hotels. Seventeen micro-enterprises were set up, focused on the revival of traditional jewelry making and other handcrafts, such as weaving and embroidery. The organization offered women training in traditional Mayan techniques and provided important access to markets for their goods, not only through sales in hotel gift shops and visits to artisan workshops, but also through sales to the hotel for room décor and guest amenities. In 2007, at least 180 women were directly involved with the program, and efforts were underway to help them establish cooperatives and explore new markets. The organization was awarded Travel and Leisure's Global Vision 2010 prize for artisan revival.

Source: Ashley et al. 2007; Travel and Leisure 2010.

In-house policies to balance productive and reproductive responsibilities: Many developing countries have strong family policies, such as child leave policies, requiring breast feeding/pumping space in businesses, and subsidized childcare. Often, however, enforcement is weak, and limited economic opportunities prevent women from speaking out. This can lead to high absenteeism and attrition, particularly in the tourism industry, where hours for service staff are erratic and often clash with key home responsibilities. In other cases, where social protection such as maternity leave is strictly enforced, businesses, even if against the law, may prefer to hire male workers. Encouraging firms to develop flexible and innovative practices such as those described in box 3.5 can help ease these constraints for their female employees, increasing loyalty and having a positive impact on the firm's bottom line.

Better housing conditions and access to basic services: The juxtaposition between tourists' accommodations and workers' housing conditions can be extreme. It is difficult for workers to do their job effectively if they lack the most basic living standards—running water, sanitation, electricity, and so forth. Although basic infrastructure and social housing should be the domain of the local or national government, often rural infrastructure in developing countries is poor (Budlender 2008b). Other actors within the industry, such as domestic tourism firms, may take on the responsibility for providing some of these services (see box 3.6). Access to clean running water and electricity can significantly

Box 3.5 ■ Work Life Balance: Multi-skills Training at IBIS Hotels

The IBIS Hotel Chain, part of the Accor Group, established "Equilibre," a program focused on revising working pattern practices that hampered female employees' ability to balance their productive and reproductive responsibilities. Central to the program's success was its multi-skills training, allowing employees to qualify for more than one job. One group that particularly benefited was women working the front desk. Instead of working two "rush hour" shifts, in the early morning and evening when guests were checking in and out, a receptionist could work the morning shift in reception, followed by the lunch shift as part of the hotel's wait staff and be home in the early evening to attend her children and household chores. The hotel saw working conditions improve with a reduction in attrition and absenteeism.

Source: http://ec.europa.eu/employment_social/equal/data/document/0506_madrid_ws3rep_en.pdf.

Box 3.6 ■ Responsible and Sustainable Tourism: Engaging in Community Development in Namibia

Wilderness Safaris, a Southern African safari tour operator, has operations in Botswana, Malawi, Namibia, the Seychelles, South Africa, Zambia, and Zimbabwe, and employs approximately 2,800 people. The company works closely with the communities in which they operate. In Namibia, for example, 42 percent of their staff members—both men and women—come from conservancy communities, and several of their camps are run as joint ventures with the conservancies, increasing community income for economic and social improvements. They have facilitated access to running water in each of the communities through the installation and financing of boreholes, improved road infrastructure, supported the development of community vegetable gardens in the more remote sectors, provided computer and radio communications equipment, and have built and support several schools in the conservancies where they work. They also provide health care services for their staff and the surrounding communities. The organization's commitment to responsible and sustainable tourism has been recognized numerous times by local, regional, and international awards.

Source: http://www.wilderness-group.com/system/assets/97/original/Wilderness_Sustainability_report.pdf?1311953373, <http://www.wilderness-safaris.com/download/12972/We%20are%20Wilderness%20Namibia.pdf>.

reduce the time female staff must dedicate to household responsibilities, freeing her to work in the industry.

Destination Country Policies

Strong tourism plan: Most destinations have, or are in the process of creating and redoing, tourism development plans. Tourism plans are typically developed in tourism ministry departments, but multiple ministries, such as trade, environment, and finance, take part. These plans outline industry regulation, forms of development to be incentivized, and regions and localities to be marketed and developed. Plans should include four aspects.

First, plans should have a section that outlines explicit gender-sensitive job creation strategies in hotels and tour operations, and the development of tourism products that have a direct, positive impact on women, such as cultural or community-based tourism. Plans may include a monitoring or certification process that documents how tourism businesses are successfully meeting gender-equitable targets. In South Africa in 2009, the Tourism Sector Codes of the 2003 Broad-Based Black Economic Empowerment Act (BBBEE) were finalized. The Codes created

a scorecard for private businesses to fill out determine if they were meeting BBBEE goals. This could be used as a model for gender-specific goals.

Second, local tourism communities should be part of the policy formation process.

Third, as FDI policies are connected to plans, they should have mechanisms that strengthen local linkages, particularly those where women have the ability to become local suppliers.

Fourth, in determining tourism markets to target, plans should create marketing strategies to foster the growth of responsible tourism that actively markets gender-sensitive products. CREST research has documented diverse source markets for responsible tourism, including Germany, the Netherlands, and the United Kingdom. Overall, developing and marketing multiple tourism products and diverse target markets (including regional and domestic markets) helps offset fluctuations and precariousness due to seasonality and fickle tourist demand. As is commonly the case though, even when gender themes are highlighted in plans (as in Kenya), they are difficult to implement due to lack of resources and structural constraints. Box 3.7 highlights efforts made by the governments of Kenya and the Lao People's Democratic Republic to improve gender aspects of their plans.

Box 3.7 ■ Examples of Country Tourism Policies Promoting Gender Equity

Kenya's 2006 National Tourism Policy states that women's tourism initiatives will be encouraged through education programs to stimulate tourism awareness as a development option in communities; foster community-based tourism projects; ensure the quality of employment and female rights at work; and promote women with "dignity" and "respect" in marketing initiatives. Lao PDR established through the Mekong Tourism Development Project (MTDP) (an initiative funded by the Asian Development Bank) with the Lao National Tourism Administration (NTA) and with further support from SNV, the Gender Strategy and Action Plan of the Tourism Sector for 2006–2008. The plan outlined six objectives with activities, indicators, and participatory responsibility that included gender mainstreaming in tourism policies, sensitizing tourism stakeholders about gender mainstreaming, including village men and women in tourism decision making, support links between tourism groups to enhance gender equality, and gathering and distributing gender and tourism information and materials.

Source: World Bank.

Tourism NGOs: Several country-based tourism NGOs and global multilateral organizations are creating pro-poor and gender-sensitive initiatives to help communities create, market, and distribute tourism products, and to advocate for community business access in tourism distribution channels. Box 3.8 documents examples.

Training access: Most national destinations have tourism-specific training schools that are often government run and funded. The quality of many schools is questionable in meeting industry needs, but they are still important conduits for skill attainment and job placement (Christian et al. 2011). Policies should be implemented that encourage female placement in management and other areas where women may be under represented. Classes should include larger tourism themes, such as gender stereotypes or how to identify sexual harassment, that go beyond traditional

Box 3.8 ■ Gender Sensitive Initiatives Led by NGOs and Multilateral Institutions

Ecotourism Kenya, the Costa Rican Association of Rural Community Tourism (ACTUAR), and the Uganda Community Tourism Association (UCOTA) are examples of country-based NGOs helping to give local tourism development a gender emphasis. UCOTA works to empower village communities to create community tourism products in up-country destinations, commonly around national parks. Over 50 active member groups countrywide represent over 2,000 individuals, of whom 60 percent are women. UCOTA is working in collaboration with the USAID-funded program called Sustainable Tourism in the Albertine Rift (STAR) to strengthen biodiversity and conservation through tourism development. The organization supported the Pearls of Uganda artisan craft-marketing booklet, distributed to private sector actors in the country as a way to facilitate value chain linkages among tour operators, hotels, and community entrepreneurs.

Since 2007, UNWTO has pushed an analysis of gender issues to the forefront of tourism development, encouraged gender equality through fair participation and empowerment, and spurred national governments to highlight gender issues in the formation of tourism policies. UNWTO is currently designing a pilot project to implement the Women in Tourism Empowerment Programme (WITEP), which will support partnerships between hotel chains and stakeholders to advance female participation and tackle gender constraints. WITEP hopes to secure funding for a Tourism and Gender Portal on the internet that will operate as a clearinghouse for information relating to gender and tourism themes

Source: World Bank.

basic “how to” training. Moreover, funding sources, like scholarships and low-interest student loans, should be made available. In addition, for tourism jobs that are traditionally considered masculine roles, such as guiding, all efforts should be made to support female participation (see box 3.9). The creation of schools that cater to women would be useful. The African Kenyan female owner of Standout Adventures in Kenya would like to start a trekking guide school for women.

Strengthen women in unions: Even in destinations that have a strong trade union movement, the role of women in unions can often be marginalized. Women need to feel comfortable joining and reaching out to unions when they have problems in their employment. For sensitive issues such as sexual harassment, it is imperative that women feel they have representatives who understand the issues and know the appropriate reporting channels for victims to take. Many unions have gender representatives, but these positions should be strengthened, and women should gain leadership roles. Furthermore, education and training programs should be created to address the gender-intensified constraints women face.

Finance policies: More availability of loan financing for small tourism businesses would be helpful, especially for female-led micro enterprises. In general, tourism businesses have difficulty acquiring loans from private banks due to fluctuations in tourism demand; micro businesses have even more difficulty. Government banks and the central bank should create microfinance programs (see Box 3.10) that specifically target female entrepreneurs. Central banks

Box 3.9 ■ Three Sisters Adventure and Trekking Empowers Female Mountain Guides

In 1994, three Nepali sisters began the Three Sisters Adventure and Trekking Company and then launched their own NGO, Empowering Women Nepal, to train local women as guides and porters and to help them deal with the challenges and constraints women face in the sector. At the end of their training, women enter an apprenticeship program where they earn a full salary and acquire field experience working as guides. In addition, the organization offers loans to fund local development programs driven by their graduates, and fosters networking by connecting program alumni interested in developing new initiatives. The UNWTO (2011) “Global Report on Women in Tourism” notes that they have trained over 800 Nepali women.

Sources: <http://3sistersadventure.com/>; <http://www.ashoka.org/fellow/lucky-chhetri>.

Box 3.10 ■ Microfinance Supports Female Entrepreneurs’ Entry to the Tourism Sector

In 2009, USAID launched the Lebanon Investment in Microfinance, a six-year initiative to support women in agribusiness, rural tourism, and information and communication technology (ICT) in Lebanon by increasing access to finance for micro and small businesses in rural areas, and in turn, by stimulating economic development across all regions of Lebanon. The program provided rural women with small loans in order to enter the rural hospitality segment of the value chain. The loans range from US\$300–US\$20,000 at an interest rate that varies between 6.5 percent and 13 percent. The types of loans vary from personal to collective and cover business and house improvement. Through the project, over 347 female entrepreneurs had been integrated into the tourism value chain.

Sources: Mahshi 2012; USAID 2010.

could act as guarantors to tourism business loans as a way to offset risks commercial banks take on due to volatility in tourism demand. There are several female microlending institutions, such as the Kenya Women Finance Trust (KWFT), but few tourism-specific lending programs. These should be created within female-based lending organizations, along with avenues where female entrepreneurs can create contacts that allow them to find loan guarantors.

Conclusion

As global tourism continues to grow and developing countries pursue pro-tourism development strategies, it becomes all the more vital to understand how gender dynamics shape the upgrading process and the outcomes that follow. Gender is a powerful organizing principle for GVCs, creating access to, and exclusion from, specific subsectors, forms of work, entrepreneurial activity, and ownership status. The conditions that support the value chain and upgrading trajectories are gendered. Practices of global lead firms, destination firms, and institutions create gender constraints that lead to gender compositions of work and wider household effects.

The tourism GVC is characterized by multiple industries that cumulatively make up the tourism sector. They follow the steps an international tourist takes when deciding to embark on and participate in international tourism. Segments are divided between outbound and inbound countries. Lead firms in the value chain have coordina-

tion, logistical, and service bundling capabilities and have direct access to international end markets. They can set standards and price points for their suppliers and steer tourists to chosen businesses and destinations. These typically are global tour operators, international air carriers, and global hotel brands.

Common forms of economic upgrading are functional upgrading along the distribution/excursion segments, which is the broad tour operator category, and product upgrading for hotels. Functional upgrading for tour operators can be a linear path from guide to local arranger to national tour operator to regional operator, whereas most hotels start off as a three- to five-star offering. Hotels continue to product upgrade when they add beds or improve facilities.

Practices that create and affect gender constraints help define upgrading potential. Global lead firm practices include pricing, setting standards, adopting gendered job constructions, and deciding what products to sell; destination firm practices include creating gendered jobs and expectations for females based on social norms and local context, and the suppliers they choose; institutional practices involve land, finance, education, labor, and family policies. All entail gender-intensified constraints and hence shape the upgrading process for tourism firms and workers.

With the example of Kenya, and a focus on national tour operators in Nairobi and hotels in Mombasa, we can see the gender implications and consequences of various forms of economic upgrading. Most tour operators are male-run family businesses, and the most successful are owned and managed by foreigners or white and Asian Kenyans. Women are in client services and ticketing positions but generally are not driver/guides, which are considered masculine and male jobs. Marketing imagery of male safari guide/hunters is promoted. This has inhibited African women from gaining guide experience and potentially opening their own tour businesses. Further-

more, when national tour operators vertically integrated with accommodations and opened their own camps, they worked with traditionally patriarchal communities where women had little access to land and decision-making processes. They typically had few employment options beyond artisan work.

In Mombasa, many hotels have downgraded their facilities due to the inability to reinvest in maintenance and renovation. A vicious cycle is perpetuated of downwards price pressure from global tour operators resulting in smaller and smaller margins to cover costs. Hotels employ a multi-pronged labor strategy of permanent, contract, and casual workers to save costs and mitigate risk. Women are already underrepresented in the hotel subsector and are more likely to be casual workers, where they are more vulnerable to extreme working conditions and hostile work environments, including sexual harassment. Even successful hotels that have upgraded facilities, opened additional sites, or vertically integrated into the safari-camp segment use a mixed labor force. In the upgraded hotels, we can find social upgrading for permanent and possibly contract workers and downgrading for casual workers.

The examples from Kenya illustrate how gender is embedded throughout the global value chain from the perspective of one destination. The lessons gleaned there, however, point to global themes and broader destination issues that may be significant for other developing countries. Policies can be pursued at the level of the global lead firm, the destination firm, and national institution to facilitate improved gender-equitable benefits, competitiveness, and economic upgrading. Lead firm monitoring programs, strengthening local linkage and corporate social responsibility (CSR) programs, adding new products to tourism itineraries, and fostering land, finance, training, and anti-sexual harassment policies are examples of policies that would create positive gender effects and mitigate the adverse gender implications of economic upgrading.

Global Value Chains, Economic Upgrading, and Gender in the Call Center Industry

Ghada Ahmed

Executive Summary

This chapter explores gender dynamics in the call center industry, using the global value chain (GVC) framework, with special attention to gender relations as they affect, and are affected by, economic upgrading. The chapter analyzes the industry at a global level and provides examples from different countries as well as policy recommendations based on best practices. Additionally, a country case study of call centers in the Arab Republic of Egypt illustrates the relationships between gender dynamics and upgrading.

Call centers are part of the offshore services industry. Establishing call centers is the most commonly followed development path to enter the global offshore services business. Call center firms manage operations, such as customer service, sales, and technical support for an array of products and companies in multiple sectors. The industry is export-oriented in most developing countries and requires significant government support, especially in the areas of infrastructure, market incentives, deregulation of telecommunications, education, and lowering trade and investment barriers. Both developed and developing countries value call centers because of their high employment potential for relatively skilled, but often marginalized, female and youth labor.

Female employment in call centers, however, is mostly at the agent level, while higher-value segments and management typically are male dominated. This is due to gender-intensified constraints facing women in the call center workplace. Long, inflexible shifts, the stigma associated with female night work, a strong gender bias in role assignment, and a lack of gender-sensitive benefits, such as maternity leave and childcare facilities, are just a few of the constraints that make long-term female engagement in the industry challenging (Batt et al. 2009; Messenger and Ghosheh 2010; Scholarios and Taylor 2010). These constraints aggravate already high turnover rates, driving up costs and limiting firms' ability to benefit from the experience of their workforce.

It is critical for success and competitiveness that call centers retain, motivate, and upgrade workers' skills. Call centers in developing countries have to tap the female workforce and address gender-intensified constraints to minimize skill gaps in higher-value segments. Raising the awareness of gender dynamics in the call center industry, improving human-resource practices, and monitoring gender performance can increase women's engagement and skills. In turn, this will boost company performance, enhance competitiveness, and enable economic upgrading. Firms, host country governments, and international donor organizations can all play a role in addressing gender inequalities and improving the call center industry's competitiveness and upgrading trajectories.

Key findings of the chapter are the following:

The Call Center Value Chain: Organization, Governance, and Economic Upgrading

- Developing countries are largely suppliers of call centers; buyers are usually in developed countries.
- Buyers have significant power in the value chain and determine the quality of service, contracts, and location. They are footloose and can quickly relocate operations in pursuit of lower costs. Firms base location decisions primarily on the availability of skilled labor and the cost of operations.
- Upgrading trajectories are not linear. Firms undertake multiple upgrading paths to move from basic product services to more sophisticated and complex transactions. Operations have to be flexible and able to respond to market shifts and changes in buyers' needs, such as seasonal fluctuations, new product launches, or the opening of new markets.
- Constraints to upgrading include increased operational costs, inadequate infrastructure, shortage of skilled labor, and the ease of doing business.
- Call centers are flat organizations where employees are highly monitored and mostly perform routine, monotonous tasks. Most of the workforce is in front-line agent positions.

- In-house call centers (those that are part of the customer service division of larger organizations) are more likely than third-party providers to have better working conditions, higher pay, and greater promotion and training opportunities.
- Large third-party suppliers have emerged in developing countries, such as India, the Philippines, and Egypt, which weakened the rationale for setting up in-house centers there.

Gender Dimensions of the Call Center Value Chain

- Jobs in the sector facilitate women's access to higher-wage and formal employment, but their participation is constrained (Basi 2009; Scholarios and Taylor 2010). Frontline work is feminized, but supervisory and management positions are often available only to men (Boreham et al, 2008). So as the industry upgrades to more complex services, the workforce becomes male dominated (Scholarios and Taylor 2010).
- Women face gender-intensified constraints, such as socially embedded constructs of gender roles in domestic responsibilities, the stigma of night work, gender bias in role assignment, limited social and transport services, and the lack of gender-sensitive government and company policies (Basi 2009).
- Women have equal access to entry-level jobs but face uneven promotion opportunities (Boreham 2008). Female workers tend to stay in routine, front-line jobs longer than men and do not have access to training and networks that would improve their career growth and increase their organizational contributions (Scholarios and Taylor 2010).
- Government policies have focused on entry into the sector but have not looked into gender dynamics, which has implications for competitiveness and upgrading trajectories.

Economic Upgrading Implications for Gender Include:

- Entry into the call center value chain favors female employment, creating new cohorts of better-paid professional women with transferable skills.
- As the industry upgrades, male employment grows. For example, functional upgrading into new international markets can require increased nightshift work, which is often socially constrained for women. Product upgrading into areas that require higher technical skills

also curtails the advancement of women due to limits on their education and training.

- In turn, social, chain, and institutional gender-intensified constraints can limit a country's ability to remain competitive and upgrade. As the call center and broader offshore services industries evolve, a global war for talent is emerging. A country's core competitiveness is beginning to be defined by the size of its skilled workforce. Limiting female participation and advancement significantly curtails the number of workers available.

Gender Dimensions of Egypt's Call Center Value Chain

- Egypt has the largest call center industry in the Middle East and North Africa. It leapfrogged from simple to complex operations, such as marketing and sales, and business and information technology (IT) consulting. In 2010, Egypt became the fourth top global destination for offshore services because of the availability of high-skilled, low-cost labor and government support.
- Global lead firms are present in the market, and locally owned third-party providers have emerged.
- Gender findings correspond to global trends: women dominate in frontline agent work, but their advancement is curtailed by social and cultural constraints, such as gendered domestic roles, nightshift work, organizational glass ceilings, and limited infrastructure and support services (transportation and affordable daycare). The industry in Egypt facilitated women's entry into offshore services, but their participation is limited to the lower-value segments.
- Few firms have talent management programs, and gender participation data are rarely tracked.

Policy Recommendations

Gender-intensified constraints in the call center GVC affect developing countries' upgrading potential. Key stakeholders—for example, the public and private sectors, industry associations, NGOs, international development organizations, and local women's associations—can drive policy changes to mitigate constraints. Governments need to look beyond market entry and attracting foreign direct investment (FDI) and examine upgrading opportunities and ways to improve access to higher-value segments.

Industry and institutions in different countries have implemented the following practices:

- Support the long-term engagement of women in the industry by providing schedule flexibility and facilities to care for children and the elderly, among others. Such initiatives help women balance productive and reproductive responsibilities, allowing them to remain in the workforce.
- Raise awareness of nontraditional career alternatives for women, such as engineering. Strategies include highlighting advancement opportunities in call centers for women with technical degrees, as well as offering gender-based scholarships to study technical subjects.
- Address the stigma of nightshift work by communicating with female workers' families through family days and other activities regarding the similar nature of night work with dayshifts. Although social constructs that prevent or limit female work at night are often deeply rooted and difficult to overcome, these policies can, over time, both help women gain access to higher-paying jobs, and lower the premium firms must pay night workers by increasing the size of the workforce available for those shifts.
- Establish skills certification programs that recognize actual rather than perceived abilities in order to reduce gender bias in role assignment. Such programs certify both technical and nontechnical skills (for example, conflict management and communication skills), reducing the transaction costs of recruitment and facilitating labor mobility.
- Foster the creation of professional women's associations, mentoring programs, and networking opportunities so information regarding advancement to higher-value and senior management positions is available to women. As a rule, they have little access to the information and networks used to recruit senior managers, because they typically are male dominated.
- Circumvent gender-intensified constraints to access to training by using innovative training tools, such as online platforms. These provide flexible training schedules, allowing women to manage their domestic responsibilities without sacrificing opportunities to upgrade their skills. Plus they reduce the marginal cost of training additional employees.
- Provide gender-sensitive benefits, such as maternity leave and childcare. This can help firms retain female employees and reduce attrition and the cost of training new staff, because women are more loyal than men.
- Implement FDI-attraction policies and labor protection laws. These should not be considered incompat-

ible in this industry. Achieving a balance between cost-based competitiveness and decent working conditions is crucial for sustainable long-term competitiveness, skills development, and upgrading.

- Create a gender council to serve in IT, investment, and trade offices. In collaboration with industry, the council can develop a code of best practices to promote competitiveness and address gender constraints.

Introduction

Over the past quarter century, the development of global business has shifted towards service activities (Luo et al. 2010). These services include a wide array of labor- and skill-intensive activities once considered strictly the domain of the industrialized world but that are now performed in developing countries. Referred to as “offshore services,” this industry now includes information technology outsourcing (ITO), business process outsourcing (BPO), and knowledge process outsourcing (KPO), as well as other advanced activities, such as research and development (Gereffi and Fernandez-Stark 2010b). The BPO segment includes call centers, which are the largest direct employment generator in the sector. They often provide a doorway for developing countries to enter the offshore services market, thereby allowing them to participate in the global knowledge economy (Fernandez et al. 2011). Countries such as India, the Philippines, and Egypt entered the offshore services value chain by attracting FDI, establishing call centers, and becoming a preferred offshore location for multinational BPO firms.

Call centers have significant direct and indirect employment potential (Kase et al. 2007). The industry offers attractive compensation and career development opportunities for graduates and professionals and incorporates previously marginalized groups—especially women and youth—into the formal labor pool. Women are strongly represented in call center employment due to their perceived innate skills and characteristics, which are considered essential to customer service, including patience and voice qualities. Drawn by this targeted employment creation, the prospect of upgrading into higher-value offshore services, and the positive impacts on the local economy, developing countries around the world have sought to attract call center operations.

Women account for an important share of call center employment. Nonetheless, the role of gender in call centers is not well studied (Gray and James 2007). Moreover,

there is little gender research into call center value chain dynamics or into how upgrading impacts gender and vice versa. Hence, the integration of a gendered approach to the call center value chain will help identify gender constraints and how they affect, and are affected by, chain and upgrading dynamics (Barrientos 2007; Mayoux and Mackie 2007).

The inclusion of gender in the GVC analysis requires understanding how gender defines roles, responsibilities, and participation throughout the chain. Industry and social dynamics, firms' policies, and the institutional context produce differences in the participation of men and women; in their choice of education, jobs, and roles; in their positions and professional development; and in their access to networks within and outside of firms. A gendered GVC analysis disaggregates firms' activities to determine gendered jobs, opportunities, constraints, and the gender dimensions of economic upgrading. This chapter assesses the gender composition of call centers, gender constraints, and the two-way relationship between gender participation and upgrading in the chain. Finally, it sets out policy implications.

The remainder of this chapter is divided into five sections. The first examines the call center GVC and its economic upgrading trajectories. In the second, gender dynamics are evaluated throughout chain activities to identify gender composition, gender constraints, and the impacts of upgrading. The third section presents a case study of Egypt's call center industry and its gender dynamic. The country was chosen because Egypt recently emerged as a top destination for offshore services, and because of the industry's potential to increase women's participation in the labor force and upgrade into higher-value segments. The fourth section presents policy recommendations to further competitiveness and upgrading and to increase women's access to better-paying jobs. The last section offers conclusions.

The Call Center Global Value Chain

The global trade of services is a relatively new phenomenon that emerged towards the end of the last century. The information and communication technology revolution fundamentally restructured the way services can be provided and gave rise to the highly innovative, dynamic, and constantly evolving offshore-services industry. The call center business is one part of this growing industry. Call centers are an important starting point for many developing countries aiming to enter the offshore services industry. They are large enough to be studied in

isolation, given their competitive nature and their growth trajectories. However, it is necessary to first understand how they fit into the broader context of offshore services. The larger value chain provides the framework that describes upgrading paths and provides insight into why governments value call centers as means of entry into the knowledge-based services industry. This section briefly presents the offshore services value chain, followed by a more in-depth discussion of the call center value chain itself and an overview of its lead firms and markets. Potential upgrading trajectories pursued by firms within the sector and the challenges they face in doing so are discussed in the last part.

The Offshore Services Global Value Chain

The offshore services value chain is presented in figure 4.1 and includes ITO, BPO, and KPO services as well as industry-specific services. ITO services range from low to high value, BPO services are low value to mid-value, and KPO services are high value. Services that are specific to individual industries can range from low to high value.⁵⁸ Call centers are a subsector of the BPO⁵⁹ services segment and represent about 40 percent of BPO activity (Business Insights 2008). These services are comprised of all call handling, customer management, and customer support.⁶⁰ The BPO segment also includes other back-office functions that were previously considered core activities of the company, such as finance and accounting, payroll, and other human resources management functions. KPO functions include higher-value business functions than BPO services, such as market research, business analytics, and consulting.

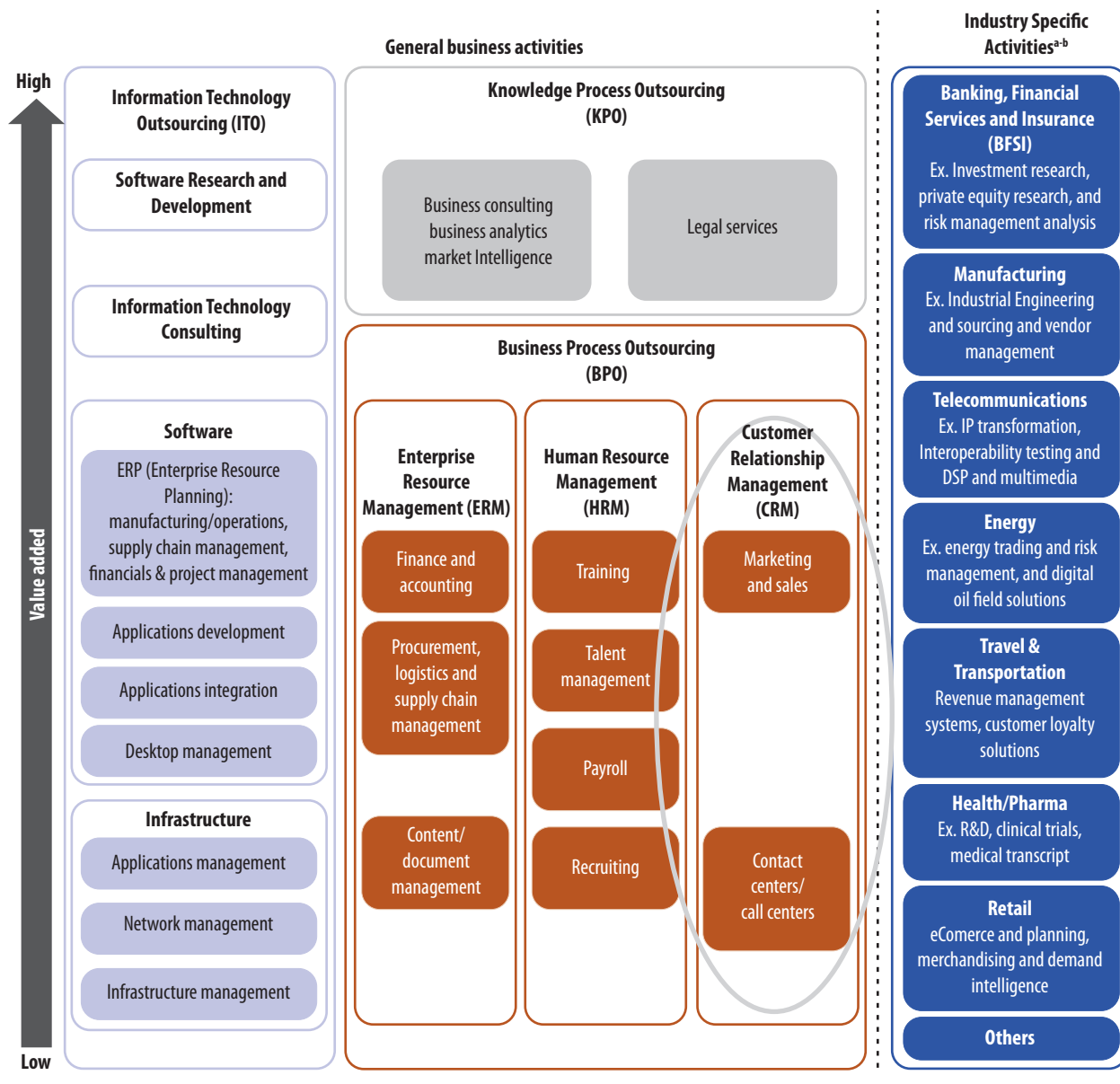
Structure of the Call Center Global Value Chain

Few studies specifically discuss the call center segment of the offshore services industry, and they generally do not apply a GVC framework. To analyze the call center GVC, we mapped the industry according to the typology of call centers, services they offer, and market segments they cover

⁵⁸ The value of different services in the chain is related to the level of preparation of the workforce required to provide the services at each stage (Gereffi and Fernandez-Stark 2010b).

⁵⁹ BPO is the delegation of firms' business processes to an external provider by leveraging information technology (Luo et al. 2010; Mohr et al. 2011).

⁶⁰ Call centers are also known as "contact centers," "customer care centers," "multimedia centers," and "service bureaus" (Business Insights 2008). Contact center is the most commonly used term to refer to the industry. In this report the terms call center and contact center are used interchangeably.

Figure 4.1 Offshore Services Global Value Chain

Source: Gereffi and Fernandez-Stark 2010a.

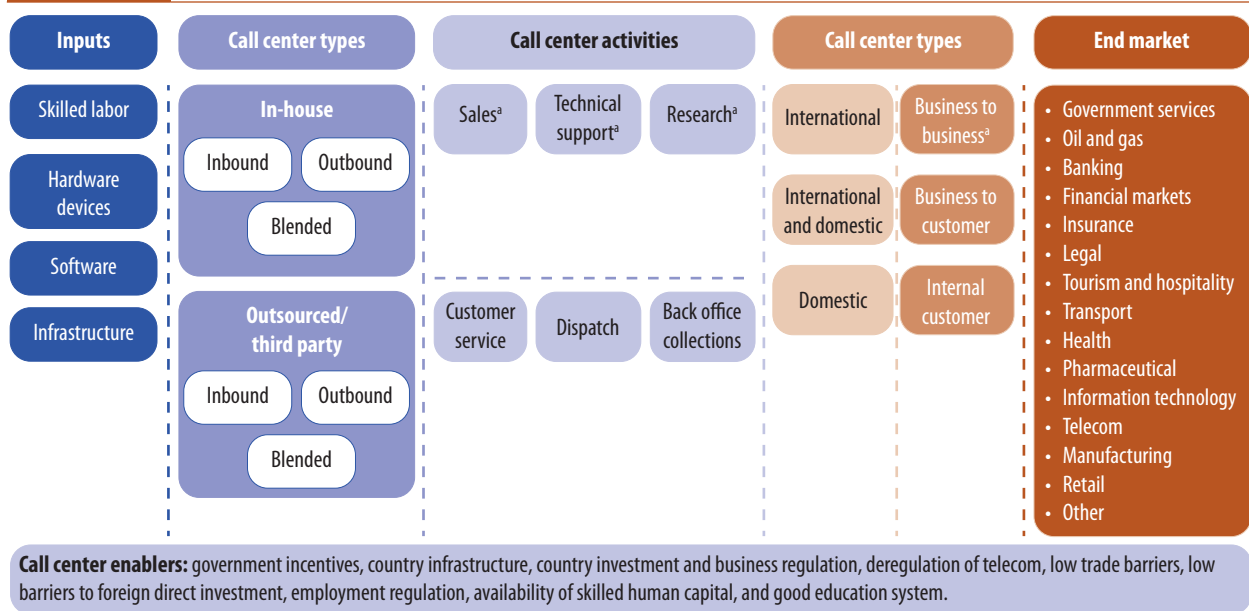
Note:^a Vertical activities—industry specific: Each industry has its own value chain. Within each chain are services that can be performed offshore. This figure captures the industries with the highest demand for offshore services.

^b This graphical depiction of vertical activities does not imply value levels. Each industry may include ITO, BPO and advanced activities.

(see figure 4.2). We discuss each of these elements of the value chain in the following sections. Higher-value services in the chain are tied to specialization and complexity of transactions in the vertical markets they serve. Lead firms operate in multiple segments along the chain and design their work organization according to their clients' size, products, and markets.

Call Center Types

Call centers are generally classified as in-house or outsourced/third-party providers. In-house call centers are captive operations that are part of the customer service division of larger organizations. These centers handle calls strictly for the parent company, control service quality and cost, and offer jobs with decision-making and problem

Figure 4.2 Call Center Global Value Chain

Source: World Bank.

Note: ^a There is a range of high- to low-value activities in these operations.

resolution competency (as opposed to strictly following a script). On the other hand, outsourced centers are independent third-party providers that handle calls and services on behalf of other organizations. Most centers began as in-house operations (Batt et al. 2009), but third-party providers have grown rapidly since the early 1990s; barriers to entry are low and off-the-shelf technology is easy to acquire. Outsourced call centers tend to make greater use of part-time and temporary workers, offer lower discretion jobs, have higher levels of performance monitoring, pay lower wages, and are less likely to be covered by union contracts (Batt et al. 2007, 2009).

Call centers function as inbound, outbound, and blended service providers (Batt et al. 2007; Beekman et al. 2004; Reynolds et al. 2003). Inbound call centers use automatic call distribution systems to receive calls and respond to inquiries from customers (Reynolds et al. 2003). They offer services such as helpdesk facilities, complaint services, and the provision of information. They are cost centers and do not generate revenue. On the other hand, outbound centers initiate calls to customers and prospects. They are profit centers that generate sales. Outbound services include telemarketing and catalogue sales. Unlike in-house call centers, outsourced centers are more likely to focus exclusively on sales and outbound, revenue-generating calls. Blended centers make and receive calls. They combine automatic

call distribution for incoming calls with predictive dialing for outbound calls along with other types of communication.

Call Center Activities

Companies in the chain combine front-office (voice) and back-office work. Basic customer service can include credit card activation, travel reservations, or claims processing, among others. Technical support is one of the most popular services to answer questions, troubleshoot, and assist with using equipment, software, and IT networks. Call centers carry out sales and marketing activities through cold calling strategies, and increasingly, through live chat applications on company websites. Customers can be internal company employees (for example, benefits support) or external customers, who buy goods and services. Figure 4.3 illustrates the principal services that can be carried out by call centers, ranging from low to high-value services.

Due to the constantly evolving nature of offshore services, call centers may incorporate functions from other parts of the offshore services value chain. Specifically, call centers increasingly perform other BPO back-office work, ranging from low-skilled jobs to sophisticated, high-skilled jobs, like technical consultancy, web design and management (Mitter 2006) as well as KPO services such as market research and data analytics.

Figure 4.3 Call Center Activities

Source: World Bank.

Market Segments

Market segments are based on geographic coverage—international, regional, and domestic—and on customer type—business-to-business and mass market. Call centers use these market segmentation strategies to differentiate their product offerings and customer base and to take advantage of specialization in workforce skills. Most call center markets are not international, with about 86 percent of centers serving their regional or national markets and only 14 percent serving the international market (Batt et al. 2007). The exceptions to this pattern are countries that specialize in global outsourcing, such as India, the Philippines, Morocco, and Egypt. International market providers depend on a bilingual labor pool and offer intensive accent neutralization and culture training. International services follow patterns of linguistic ties, such as between France and Morocco, between the United Kingdom and India and Egypt,⁶¹ and between the United States and the Philippines (Batt et al. 2007; Willcocks et al. 2009).

Mass-market centers tend to be highly standardized, usually provide lower-value services, have the highest volume of service and sales transactions, and are cost-focused. On the other hand, business-to-business call centers tend to offer higher-value services with more complex transactions that require highly skilled labor. These centers often use sophisticated customer relationship technologies, offer better-quality jobs, pay higher wages, and employ a greater proportion of fulltime permanent staff. On average, almost 75 percent of call centers serve the general or mass market. Over 80 percent of the workforce is located in these centers (Batt et al. 2007, 2009).

End Markets

Call center services cover a broad range of industries, including the automotive industry, financial services, health care, government, manufacturing, telecommunications, and tourism, among others. The telecommunications and banking industries are the largest users of call centers. However, the travel and hospitality sector is projected to be one of the largest single vertical market, followed by energy and utilities and health care (Furness 2007b). Call

centers may service many industries simultaneously, or they may specialize in one.

Industrial Organization and Chain Governance

The global call center industry is considered young, with most offshore centers emerging in the last 10 to 14 years (Batt et al. 2007, 2009). Market dynamics such as globalization, shorter product life cycles, and the construction of “intelligent networks” that provide toll-free numbers, pushed the industry to take off (Richardson and Belt 2001). By 2007, industry revenues had reached US\$99.3 billion (Business Insights 2008) and are projected to reach US\$189.3 billion by 2015 (Global Industry Analysts 2010).

The industry is buyer driven, and the chain is governed by complex contracts that define the degree of integration of firms, services, and fees. Buyers are from different vertical markets (see “End market” in figure 4.2) and control the supply chain including the final market as well as the technology (Mitter et al. 2004). Buyers view these services as a strategic choice that allows them to shift some operations to outside providers, lower their operational costs, and focus on revenue-generating activities. Customers are primarily located in developed economies such as the United States, Canada, the United Kingdom, France, and Germany.

Lead service providers include 24/7 Customer, Accenture, Accretive Commerce, ACS, Aegis, Amergent, Convergys, Genpact, Infosys, SITEL, Teleperformance, Vodafone, and Vertex (Alliance Data) (Business Insights 2008; Datamonitor 2004; Gereffi and Fernandez-Stark 2010b; Global Industry Analysts 2010). These firms have significant market power because of their global agent capacity, strategic use of resources, technology expenditures, employee training, and pricing strategies (that keep

⁶¹ Egypt had colonial ties with France and England, which made French and English popular second languages in the education system. Moreover, Egypt had also other trade and political ties with European countries such as Germany, Italy, Spain, and Greece. This created demand for these languages and the development of language schools and academic courses.

costs low and maximize profit margins). Service providers develop specialized expertise and economies of scale to meet buyers' needs and criteria. Call centers in the chain adopt standardized processes, buyer-specific procedures, and flexible employment structures that put pressure on the autonomy of workers, job security, and wages (Flecker et al. 2009). Increasingly, smaller (and often newer) providers are exiting the market because they are unable to spread their fixed costs over a larger base of revenue-producing agents. This has led to significant consolidation (closings, buyouts, mergers, and acquisitions) in the global market of service providers.

Industry standards and certifications in the call center segment are voluntary, private standards adopted by lead firms to ensure quality and data security (see table 4.1). Although these standards are often not required by buyers, service providers use standards to improve processes, to differentiate themselves, claim an edge over their global competitors, and strengthen their relationships with their buyers. The Customer Operations Performance Center (COPC) standards and certifications are the fastest-growing industry-specific standards that provide

compliance parameters in areas such as client satisfaction, computer infrastructure, and accuracy of responses.⁶² The International Organization for Standardization (ISO) 27000 standard series are important for ensuring clients that their private information is well protected.

Call centers are relatively "footloose" and are not tied to locations close to their customers (Beekman et al. 2004). The industry uses the global delivery model, which gives buyers the flexibility to source services from cheaper locations. The availability of qualified, low-cost labor is one of the leading elements that determine location decisions of global companies.⁶³ In addition, language and culture constrain the location choices of

⁶² In 1996, the leading information technology enabled services (ITES) consumers such as American Express and Motorola created COPC standards and certifications.

⁶³ Market research organizations such as Gartner, A.T. Kearney, and Everest developed a country-rating system that analyzes and ranks locations. Each country's score is composed of a weighted average of measurements such as financial attractiveness, labor skills and availability, and business environment.

Table 4.1. Call Centers Standards and Certifications

Standards and Certifications		
Quality and performance standards	ISO 9001	International standard for implementing a quality management system. It is primarily based on principles such as customer orientation, employee involvement, leadership qualities, or continuous improvement systems.
	ISO 10002	International quality standard focused more strongly on customer satisfaction and complaints management. It stands for the recognition and expedient handling of complaints and evaluates complaints processes.
	COPC-2000	Customer service provider global standard that focuses on implementing contact center best practices to improve performance metrics in customer satisfaction and service, inbound and outbound sales, dispatch, collections, retention, remittance processing, fulfillment, and other related operations.
	COPC-2000 VMO	The standard for vendor management organizations (VMO) sets minimum requirements for buyers of third-party customer contact center services. These requirements include leadership and planning, key business processes, key people processes, and goals.
Data protection	Payment Card Industry Data Security Standard (PCI DSS)	The standard increases controls on financial services to protect consumer information against fraud. For example, call centers cannot record consumers' confidential information, such as security codes.
	ISO 27001	The ISO 27000 series of standards cover security. Best practices for privacy data protection include limiting access to personally identifiable information to only those who have a documented need to know, such as payroll personnel, and privacy protection training for individuals with access to that data.

Source: World Bank based on Rutrecht 2011.

corporations, creating a different global pattern of offshoring than manufacturing companies, where cost and access to markets are primary drivers (Batt et al. 2009). Liberal trade and investment policies, such as tax-free service and technology imports and exports, or free trade zones, are often leveraged by the call center industry to limit overall cost.

When these firms establish operations in new locations in developing countries, they have an impact on economic and social structures by creating relatively high-paying jobs (by local standards), connecting local agents to customers abroad, establishing linkages to a network of support services, and having spillover effects on domestically owned firms. Although strategic decisions are often taken outside host countries with national policy makers and employees having little or no say (Mitter et al. 2004), competition between (and within) countries is intense to attract these investments. This can largely be attributed to the considerable employment creation capacity of these centers (Richardson and Belt 2001) and that they are a common way to enter the offshore services value chain (Fernandez et al. 2011).

Countries such as India, the Philippines, and Egypt grew their call center industry through strong government support and the availability of low-cost, highly skilled labor. In these countries, governments introduced laws and regulations, implemented incentives, reduced trade barriers, deregulated telecommunications, liberalized financial markets, improved infrastructure, and invested in education to attract FDI in the industry. Today the leading offshore service provider locations include the Philippines, India, Egypt, Malaysia, Morocco, Tunisia, South Africa, Mexico, China, Poland, and the Czech Republic (Fernandez-Stark and Gereffi 2010). Table 4.2 highlights key factors that have enabled these countries to develop as leading call center locations.

Economic Upgrading Trajectories

Economic upgrading generally refers to moving from lower-value to higher-value activities to increase the benefits (for example, security, profits, value added, and capabilities) from participating in GVCs. In this section, we refer to the upgrading typology developed by Humphrey and Schmitz (2002) that includes functional, product, and process upgrading. However, it is important to note that these different types of upgrading are also frequently connected, particularly in a dynamic industry such as offshore services. Developing countries generally enter the global call center value chain by attracting FDI and upgrade when industry firms move from lower-value operations to higher-value, technologically sophisticated

and skill-intensive transactions. Upgrading trajectories are not necessarily linear, and firms may undergo multiple types of upgrading at the same time.

Market entry: This occurs when global firms such as Procter and Gamble and Convergys set up captive centers and offshore operations in lower-cost locations to service North American and European customers. Initial investments mostly include infrastructure, technology, and skills development. Attracting multinational call centers (captive and third-party providers) often has spillover effects in developing the capacity of local third-party providers in host countries as experienced in India, the Philippines, and Egypt. Exposure to FDI and market dynamics in these countries pushed local providers to leapfrog and experience functional and product upgrading within the BPO and other segments of the offshore services GVC.

Functional upgrading: Firms can acquire new functions in the chain, such as data analytics or market research services. This involves changing the inter-firm division of labor within the chain (Humphrey and Schmitz 2002) and requires the firm to hire employees with a different set of skills (Fernandez-Stark et al. 2011b). Call centers upgrade by moving from inbound services to blended services including both incoming and outgoing calls, handling several market segments such as national and regional operations, or the addition of new international markets,⁶⁴ shifting from mass market to business-to-business services, and taking on more complex activities. In addition, firms may upgrade into higher-value segments of the offshore services value chain, expanding beyond front- and back-office processes to engage in high-end, knowledge-intensive services in vertical markets such as investment banking, taxation, law, logistics, business consulting, and health care (Mohr et al. 2011).

Product upgrading: Firms can also upgrade by providing new products that generate more value added per employee. This can be achieved by a repositioning in the value chain to higher-value products (Humphrey and Schmitz, 2002). These include shifting from low value-added services such as repetitive customer service work to higher value-added services in technical support and data management. Many

⁶⁴ Operations are similar across countries in terms of markets, service offerings, organizational structure, and workforce characteristics (Holman et al. 2007). However, there are substantial differences in the organization of work and human resource practices that are influenced by the country-specific institutional and regulatory frameworks (Batt et al. 2007, 2009; Holman et al. 2007).

Table 4.2. Call Center Enablers

Call center enablers	
Dismantling of trade barriers	Lowering trade barriers, improving the business environment and implementing incentives by countries such as India, the Philippines, Malaysia, and others increased imports of technology products and private investments (local and foreign) in offshore services, especially BPO call centers.
Easing restrictions on FDI	FDI contributed to technology diffusion within developing countries. FDI can also have significant spillover effects on domestically owned enterprises. For example, leading call center companies from France and Spain paved the way for domestically owned and export-oriented call centers in Morocco and Tunisia.
Trade agreements	No specific trade agreements target the BPO sector and the call center industry. However, there are a number of international agreements that impact market entry of call center multinational firms and upgrading trajectories. For example, WTO negotiations have already seen commitments to further telecommunication and financial liberalization (Lam 2005); intellectual property rights under the WTO Agreement can benefit local and exporting BPO service firms (Lam 2005); and the Uruguay Round negotiations on the General Agreement on Trade in Services (GATS) are partially a catalyst for promoting trade in services (Lam 2005).
Deregulation of telecom	Deregulation in countries such as India, Egypt, Jordan, and Morocco lowered communication costs, increased investments in the telecommunications sector, and improved access to, and the provision of, services.
Financial system liberalization	Improving access to finance is critical to market entry of third-party providers and operation of multinational firms. For example, India entered the call center segment and upgraded by improving financial services, increasing credit, and lowering transaction costs.
Intellectual property and data protection regulation	Intellectual property protection is a requirement to upgrading FDI investments in higher value-added activities in the BPO and other offshore services activities.
Education	A strong education system and a multilingual skilled labor are critical to market entry and upgrading in the value chain. For example, India improved its engineering and information systems education to upgrade into higher value added technical support. Also, the Philippines improved language and technical training to offer competitive call center services.
Low-cost and skilled labor force	Cost and skill level of the labor force are lead drivers of location decisions. India competes in the call center global market based on its low labor cost. The Philippines is overtaking India's lead position by keeping labor costs low and improving skills.

Source: World Bank based on industry sources.

firms achieve this upgrading by responding to increased demands from clients looking to maximize cost savings and consolidate services in “one-stop shops.” As buyers gain confidence in their established service providers, product upgrading through the call center value chain can facilitate functional upgrading for the firm into other segments of the offshore services value chain, such as other back-office work, or even more sophisticated KPO market intelligence work.

Process upgrading: This upgrading occurs by transforming inputs into outputs more efficiently by reorganizing

operations or introducing superior technology (Humphrey and Schmitz 2002). In call centers, information technology plays a key role in executing end-user customer service, sales, and other business strategies. Both multinational and local firms regularly upgrade technology to increase productivity, response time, customer satisfaction, and quality of management to improve their overall competitiveness. Software solutions, such as customer relationship management (CRM) systems that support operations, are constantly advancing, and upgrades can significantly enhance a provider's performance. New technology, such as the video contact centers, allows agents to visually demonstrate a

solution to customers. Virtual worker technologies represent a significant expansion of call center functionality to nontraditional call center workers, by allowing agents to connect from remote locations.⁶⁵ Some specialized and captive call centers are also improving processes by upgrading agent work to allow more discretion, improve job quality, increase customer retention, and decrease turnover.

Access to skilled labor, capital, infrastructure, and regulation are among the key constraints to firm upgrading. These constraints require both firm and government commitment to be overcome. Large multinational firms, such as Xerox, IBM, and Infosys, are better positioned to face financial challenges and have effective internal training programs to overcome the shortage of skilled labor than smaller, local firms with limited access to capital markets and human capital. However, government policies and trade liberalization are crucial to firm upgrading regardless of size. National education systems are required to create a labor pipeline for the industry, while labor regulation should be sufficiently flexible to allow for round-the-clock service provision. Also, improved regulation to ensure access to affordable telecom services, tariff-free importation of the required technologies, and a simplified process for including new services for tax-free exports are essential to remain competitive.

Table 4.3 outlines upgrading trajectories and requirements and provides country-specific examples.

The Call Center Workforce

Prior to analyzing the gender aspects of the call center industry, it is useful to understand the industry workforce in general. This brief section provides an overview of the key characteristics of the call center workforce as well as highlighting certain key challenges faced by employees.

Call centers are generally flat organizations with agents and managers comprising about 75 percent and 12 percent of employees⁶⁶ respectively (Batt et al. 2007). The size of call center firms varies. Large operations can have thousands of workers. Small ones are a fraction of that size (Reynolds et al. 2003) but a minimum of around 100 workers is required to achieve economies of scale (Klenke 2011). Larger call centers have a higher volume of routine transactions and monitoring systems. In-house, specialized technical centers and business-to-business centers are usually smaller and have higher worker discretion compared to third-party providers. The majority of workers in the call center industry are young, single female agents working complex shift patterns that reflect peaks of customer demand (Beekman et al. 2004).

In many developing countries, jobs in the call center industry pay higher wages than other economic sectors,

which allows them to attract highly skilled workers. For example, wages of Indian BPO workers are nearly double the average wages in other sectors of the Indian economy (Messenger and Ghosheh 2010). Call center workers are often young university graduates. They are usually around 25 years old, speak multiple languages, and belong to the elite social strata in their countries. Firms use incentive pay in addition to base pay strategies to reward frontline agents and supervisors. Workers who have specialized technical skills in areas such as engineering and investments, speak multiple languages, and/or work night shifts make higher wages than others.

Labor skills vary depending on the call center's activities and markets. For example, some require highly skilled data mining and technical abilities, while others require multi-language skills (see table 4.4). Agents are expected to operate about eight software packages, navigate several knowledge systems, and demonstrate a high level of technical understanding. Training in soft skills and IT is particularly beneficial to call centers and is generally provided by colleges, private specialized institutions, and firms (Fernandez-Stark et al. 2011b). Few countries have developed public training courses or certification procedures for call center employees. Workers are trained to meet Western standards, suppress their foreign accent, and take on another identity by pretending to be from North America or Europe. New hires usually receive about two to three weeks of intensive training and experienced agents receive anywhere from 6–15 days per year (Batt et al. 2007).

Opportunities for promotion are often limited in the call center industry, including a move to management, quality assurance, and workforce planning positions (Klenke 2011). There is a top-down approach to management and collective bargaining is uncommon.⁶⁷ Managers use performance metrics technology to develop standardized requirements for employee behavior, work routines, and performance (Batt et al. 2007). Most centers focus on reducing the time per call in order to minimize labor costs. There is tension between cost efficiency and customer-oriented strategies, which makes maximizing call

⁶⁵ Virtual agents are regarded as a solution to high attrition rates in the industry. However, growth in virtual worker agent positions is predominately found in North America and Western Europe (Furness 2007a).

⁶⁶ The rest of the workforce is in executive, back-office support such as payroll and other support-type positions.

⁶⁷ Unions find it difficult to organize in call centers because they can easily relocate, they make considerable use of flexible workers, and there is a high turnover rate among employees (Batt et al. 2009).

Table 4.3. Call Center Economic Upgrading

Call center upgrading trajectories		Key constraints
Entering the value chain		
Market entry	<p>To attract FDI, countries establish infrastructure, implement economic reforms, deregulate telecom, upgrade education, promote the country, and provide investment incentives. Entering the value chain was initially characterized by multinational companies establishing captive centers to service customers in their primary markets—North America and Europe.</p> <ul style="list-style-type: none"> • India: In 1999 telecom deregulation reduced communication costs and supported the adoption of new technology. This stimulated FDI in inbound call and data processing centers. The early lead firms in India were American Express, GE Capital, and British Airways. • The Philippines: In the late 1990s, AOL was the first company to leverage deregulation and outsource e-mail support to a nonvoice call center. The service was performed in “real time” during U.S. daytime/Philippine nighttime hours (Kase et al. 2007) 	<ul style="list-style-type: none"> • Infrastructure (ICT and other) • Policy and regulation: telecom, banking system, education • Data privacy regulation • Availability of skilled labor • Cost of operation and labor • Investment in technology and labor
Functional upgrading		
Upgrading within the call center industry	<p>Call center type: By offering blended services (inbound and outbound), shifting from simple to more complex transactional operations.</p> <ul style="list-style-type: none"> • The Philippines: Two contact center companies were launched in the Philippines as inbound call centers, PeopleSupport^a and eTelecare, which now offer multichannel blended services.^b <p>Market segments: Expanding geographical and customer focus. Firms expand beyond national to regional and/or international markets. International lead firms expand offshore services to cover multiple countries. Firms expand customer focus by upgrading from mass-market customer service to business-to-business services.</p> <ul style="list-style-type: none"> • India: Aegis Communications, a subsidiary of the Indian conglomerate, Essar Group, offers multichannel customer contact management services with database management, analytical, and market intelligence services to clients across several industries. It operates 24 centers in 18 cities around the world. 	<ul style="list-style-type: none"> • ICT infrastructure • Investment in technology and training • Skilled labor • Cost of operations and labor • Demanding shift schedule (night shift work)
Product upgrading		
Upgrading in the BPO and ITES segments	<p>Upgrading to other BPO segments: Contact centers shift from established basic BPO operations such as customer service to new more complex transaction services including technical support and data management.</p> <p>This type of upgrade is often required to facilitate functional upgrading such as from mass-market operation to business-to-business operations. This requires higher skills and a more specialized workforce to handle complex transactions. Firms’ systems have to be integrated with their client firms and follow the same business cycles.</p> <ul style="list-style-type: none"> • The Philippines: Firms such as EBusiness BPO Inc. upgraded from call center basic customer services to other call center services. These firms now also offer a wide range of front- and back-office services including human resources, sales, finance and accounting, marketing, and administrative support. 	<ul style="list-style-type: none"> • ICT infrastructure • Investment in education • Highly skilled labor • Demanding shift schedule • Depth of product knowledge • Reliability and quality • Ability to outsource lower-value operations to focus on higher-value activities

(continued on next page)

Table 4.3. Call Center Economic Upgrading (*continued*)

Call center upgrading trajectories	Key constraints
Process upgrading	
<p>Upgrading within the call center industry</p> <p>Providers invest in information technology to help drive productivity and accuracy, especially in processes that require significant data entry and data referencing. Automation can improve productivity by about 8 percent for average call handle time for agent-based interaction, and significantly higher for nonvoice multichannel services, such as e-mail and Web chat (Singh et al., 2010).</p> <p>Call centers adopt multichannel voice and nonvoice technology: telephone and Web based support: e-mail, chat, voice-over-Internet, and cloud.</p> <ul style="list-style-type: none"> • India and the Philippines: Established technology parks to provide the infrastructure for technology development of the call center industry. Both countries established IT sector development agencies to facilitate sector upgrading. • Global firms operating in-country such as Convergys in Philippines, Accenture in India, and growth of captive centers, such as GE Capital in India, had a spillover effect in terms of industry knowledge and technical expertise. 	<ul style="list-style-type: none"> • ICT infrastructure • Adopting up-to-date software and technologies • Investment in training • Skilled, but low-cost labor • Improving processes and productivity and cutting costs

Source: World Bank.

Note: ^a People Support recently merged with Indian giant Aegis.

^b Both companies are also listed on NASDAQ.

ICT = information and communication technology; ITES = information technology enabled services.

volume and providing excellent customer service stressful in sales-oriented call centers.

Attrition is quite high in the industry—anywhere from 30 percent to 50 percent—and this impacts firms' competitiveness (Klenke 2011). Call center work is considered highly stressful with little opportunity for ad-

vancement. In contrast to jobs in other segments of BPO, work in call centers is often considered to be a stepping stone to a more "meaningful" career (Wichterich 2008). The intensification of the labor process by measuring the quantitative and qualitative productivity of workers; the constant monitoring, surveillance, and disciplinary-

Table 4.4. Example of Skills and Attributes of a Call Center Worker

Certification	Skills	Knowledge	Attributes
<ul style="list-style-type: none"> • College degree • Technical education • High school 	<ul style="list-style-type: none"> • Good communications • Effective listening • Language skills • Speed and accuracy of typing • Microsoft Office and other applications • Telephone etiquette 	<ul style="list-style-type: none"> • Customer service • Computer literate • Product and market knowledge 	<ul style="list-style-type: none"> • Ability to work under pressure • Assertive • Attention to detail • Courteous, friendly and helpful • Customer focus • Flexible • Team player • Patient

Source: World Bank.

based supervision; the fast-paced work structure; competition among teams for monetary incentives; and performance-linked remuneration all lead to high levels of stress (Ng and Mitter 2005). In addition, there is physical stress from continuous work with few breaks and night shifts, especially in third-party, outbound call centers (Ng and Mitter 2005).⁶⁸ The ILO recommends raising awareness of industry work routines and the redesign of work processes to allow workers more autonomy and to make better use of worker qualifications (Messenger and Ghosheh 2010).⁶⁹

Gender Dimensions in the Call Center Global Value Chain

According to Bain and Taylor (2000), the growth of the call center industry is the product of Western corporate strategies, which are shaped by political, economic, and social forces. The work organization of call centers replicates many of the gender inequalities experienced in developed countries, with expectations about workers' attitudes, behaviors, and interactions embedded in the transnational organization of the industry. This, in turn, impacts gender dynamics in host countries that enter and upgrade in the chain. At the same time, these chains are deeply influenced by the gender dynamics of the local cultural, economic, and social structures in which they are embedded. In many of the developing countries with call center operations, the traditional role of females lies in childcare and domestic responsibilities. We thus expect women to have significant short-term opportunities in the industry as it provides access to higher-skilled formal employment opportunities, but we also expect significant longer-term challenges for women's involvement and progress in the industry.

Call centers provide professional women in developing countries with higher-income jobs in the formal sector, which empowers them and increases their access to training and technology. Yet the feminized call center workforce is confined to mostly frontline and administrative positions. By using a gender lens to examine the call center value chain, we are able to identify and analyze its gender composition and constraints. Research on gender and women's work in offshore services is highly constrained by the lack of macro and micro data classified by gender, and by the scarcity of surveys that document the extent of women's and men's specific engagement in the sector in developing countries. The next section explores gender dimensions of the call center value chain to address some of the research gaps by analyzing the gender composition of the workforce in call centers, gendered

constraints in the call center GVC, and gendered impacts of economic upgrading.

Gender Composition

Call center work is often defined as female work. Hiring-managers believe women naturally possess better social skills than men, which makes them better suited for call center work (Ng and Mitter 2005; Ng and Yong 1995). Female participation in the chain is concentrated as employees, particularly at the agent level, with limited representation in management and as business owners. Figure 4.4 illustrates female participation in the chain. Notably, gender bias is strong in the distribution of roles by content matter. Technical and analytical roles are dominated by males, while traditionally feminized fields such as nursing, customer service, and office administration have heavy female participation.

The main gender characteristics of the call center value chain are as follows:

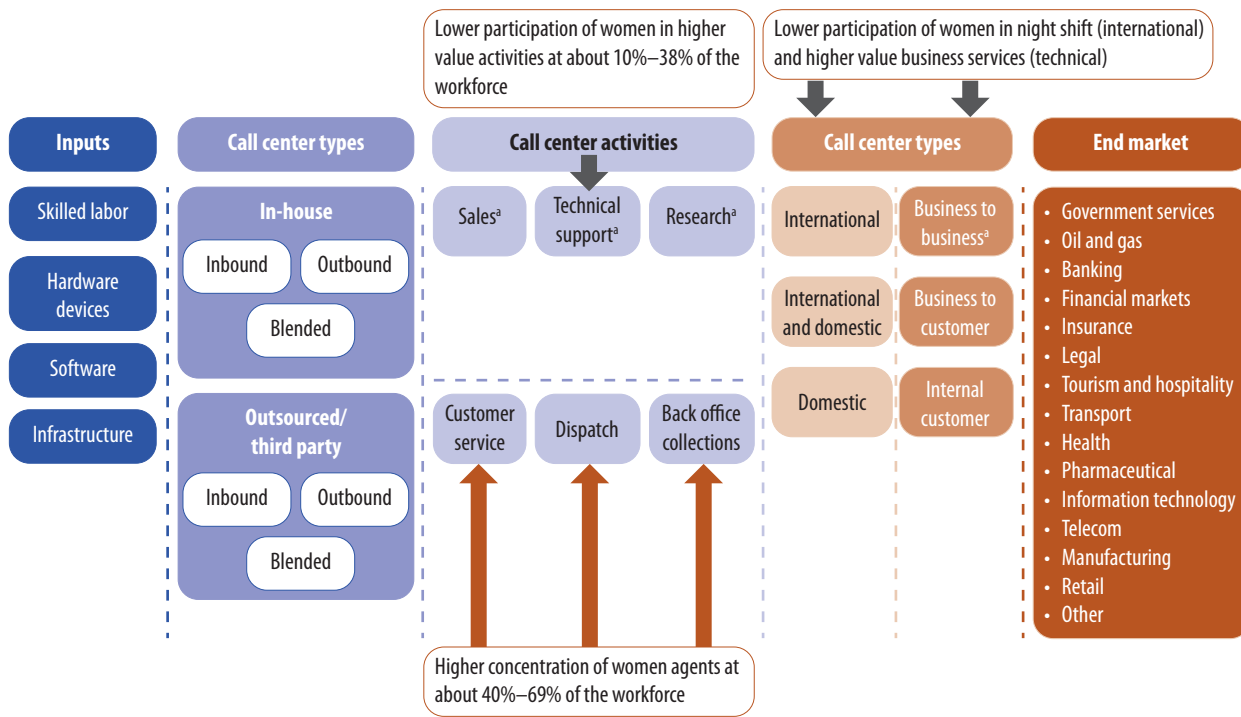
Agent-level positions are feminized and technical roles are not. Women face few barriers in accessing entry-level positions. In a typical call center, women are about 69 percent of the work force (Batt et al. 2007, 2009). Female workers are likely to be in agent and administrative positions (see figure 4.4) and remain as call handlers longer than men (29 and 20 months, respectively) (Scholarios and Taylor 2010). Men tend to migrate faster from customer-facing roles to technical or strategic positions or leave the industry for higher-paying jobs. Female participation lags behind their male counterparts in higher-value technical roles such as help desk and design (about 69 percent) and stock brokerage (about 59 percent) (Scholarios and Taylor 2010). In India, for example, women represent 11–19 percent of the employees working in software engineering support call centers (see table 4.5) (Basi 2009). On the other hand, female participation is high in traditionally feminized fields. For example, in the Philippines, female nurse call center agents make up about 70 percent of the workforce (Payscale 2011).

Few women are in supervisory or managerial positions. Research suggests that men tend to monopolize supervisory and management positions (Bain and Taylor 2000). Few women progress internally beyond the supervisor or team leader positions because of the flat organizational

⁶⁸ Negative health effects are emerging such as lack of sleep or rest, sleep disorders, and backache (Keitel 2009).

⁶⁹ Industry workers in developing countries are college graduates who are performing tasks that are usually performed by high school graduates in call centers in developed economies.

Figure 4.4 Gender Mapping of the Call Center GVC



Source: World Bank, based on industry interviews and a literature review. Note: a. There is a range of high- to low-value activities in these operations.

structures and high competition for these jobs (Scholarios and Taylor 2010). Figure 4.5 highlights the gender roles in call centers.

Female participation is low in night shift work. Night shift workers in developing countries in Africa, the Middle East, and Asia service customers in North America and are paid higher wages than for regular shifts. Call centers

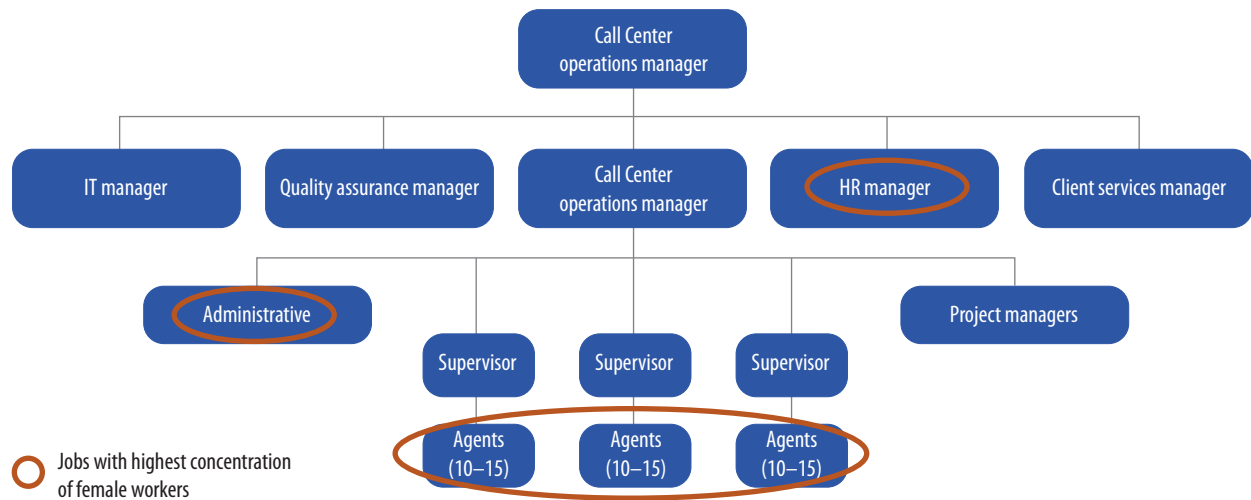
favor employment of males in night shifts because of difficulties in transport logistics, regulation, and the stigma associated with female employment in night shift work. It is common for male participation to reach 100 percent in these shifts.

In-house call centers offer women more advancement opportunities. There is little difference in the composition

Table 4.5. Gender Composition and Wages in Call Centers in India, 2011

India	Position	Gender of workers (%)		Annual salary (2011 US\$) (1–20 years experience)		Critical factors
		Female	Male	Female	Male	
		Call center agent	55–70	20–45	3,591–9,571	
Executive	19	81	2,137–4,580	2,690–4,759	Education, professional development, experience, access to social and business networks, mentoring	
Software engineer	16	84	4,720–11,824	5,051–15,634	Education, professional development, experience	

Source: Payscale 2011.

Figure 4.5 Gender Roles in Call Centers

Source: Author.

of the labor force between third-party providers and in-house call centers. However, in-house call centers are more likely to have better working conditions, higher pay, and more opportunities to be transferred, redeployed, or promoted to other departments within the organization (Ng and Mitter 2005). These centers generally have a higher proportion of females in team leader and upper management positions than third-party providers. In-house call centers that provide inbound services are less stressful, have lower turnover rates, are smaller, and focus more on employee retention than outbound third-party call centers (Ng and Mitter 2005).

There are call centers that hire women only. Countries that emphasize segregation between men and women, such as the United Arab Emirates, overcome social constraints to women’s employment by developing “women-only call centers” that hire women exclusively (see box 4.1). These centers increase the employment of women and provide them with opportunities for training. Migrant female workers, especially from India and the Philippines, dominate other call centers in the United Arab Emirates, particularly in lower-value segments such as customer service, appointment setting, and back-office operations.

Gender Constraints

The following section highlights the gender-intensified constraints that restrict participation, limit access to higher segments in the call center value chain, and put workers at risk of exploitation and casualization. These include social, embedded, and institutional constraints. Social constraints

are beyond the chain and impact the gender roles and work, education, and career decisions of women; embedded constraints exist within the chain; and institutional practices and regulations exist in the context of the competitive call center industry.

Social Constraints in Gender Roles, Education, and Night Shift Work

Traditional gender roles. Women continue to bear their traditional domestic responsibilities while also working outside the home. Regardless of having a job, women’s additional or even primary responsibilities are in unpaid domestic work, including child-bearing, family care, and meal preparation (Patel 2005). Because their earned income is often considered supplemental, they are more likely than men to leave their jobs to marry or take care of the family. The multiple demands on women’s time affect career decisions, increase turnover, and contribute to social pressure to exit the job market. For example, India’s women, especially those brought up in traditional families, struggle to combine their domestic responsibilities and jobs outside the home, and 54.5 percent of women versus 15 percent of men leave their job to take care of children or elderly parents (Basi 2009). Young women tend to take a call center job to save enough money to get married, and then they leave. In other countries, such as Tunisia, Morocco, and Jordan, women are expected to opt to leave their jobs once they have children as they continue to solely bear the burden for domestic responsibilities. The lack of daycare facilities in many developing countries also excludes many women from the industry.

Box 4.1 ■ Women-Only Call Centers in the United Arab Emirates

The United Arab Emirates is the second top offshoring and outsourcing destination in the Middle East and North Africa region (MENA). The country leads in headquarters functions and services that support multinational corporations in MENA (Peterson et al. 2011). Outsourced support is the largest segment the country hosts; it provides opportunities for women's employment and training (Jackson et al. 2010). Women from the United Arab Emirates are highly educated and are estimated to represent 59 percent of the national workforce (United Arab Emirates 2010). Almost 40 percent of women work in the public sector, 18 percent in the private sector, 29 percent work as representatives of various organizations, 7.6 percent are self-employed, 7.3 percent participate in partnership ventures, and 6 percent work in business. Barriers to women's employment are mainly cultural, such as the preference to work in women-only facilities. The Al Ain Contact Centre, established by Etihad Airlines, opened its first women-only call center, which is staffed by more than 80 Emirati women trained by industry specialists as call center agents and team leaders (Etihad Airways 2011). In 2011, the Central Bank of Abu Dhabi, one of the emirates, also opened its first women-only call center. Women account for more than 67 percent of the United Arab Emirates employees in the local banking sector, which prompted the bank to open the call center (Emirates 24/7 2011).

Sources: See citations in box text.

Access to education. Women tend to specialize in socially acceptable fields that will not conflict with their domestic roles (Patel 2005). As a result, fewer women at choose to pursue education and careers in engineering,⁷⁰ design, and financial investments, which prepare them for higher-value positions. Their education in some of these fields is discouraged, and their career pursuits are considered temporary until they get married. In countries such as Egypt and India, many women exclude themselves from education or training requirements and opportunities when it involves travel or evening hours because of social pressures and domestic obligations.

Night shift work is discouraged for women, due to social stigma and concerns about safety (Keitel 2009). In India, women face resistance from their families, neighbors, and society and struggle with perceptions about women who work “the hooker shift” or that “call center equals call girl job” (Basi 2009). The safety of employees, male and female, during night or dawn commuting is one of

the most contested issues surrounding night shift work (Keitel 2009).

Chain-related Constraints to Participation through Gender-Defined Roles, Human Resources Practices, Wage and Benefit Policies, and Training

Gender roles. The feminization of the workforce facilitates women's access to call center jobs in frontline work and lower-value segments of the chain. Female workers are likely to be in customer-facing agent roles, such as credit card activation or claims processing (see table 4.6 for gender segmentation of work). Industry firms consider customer service work as “women's work” and develop job profiles that favor women (for agent-level work) (Scholarios and Taylor 2010). Women's appropriateness for the work is based on gendered traits that are deemed most suitable for frontline positions such as their perceived “natural ability to be calm and diplomatic during heated discussions” (Basi 2009). Employers emphasize the importance of soft skills and believe that qualities such as “caring, patience, empathy and making people feel good” are more exclusive to women, and are learned through social interaction. These skills are, however, not generally associated with certifications or wage premiums.

Human resources practices. Promotion and job-related decisions are based on gender-defined roles influenced by the corporate culture of many transnational firms. When promoted, women are offered opportunities in gendered roles, such as human resources, that favor female workers. Recruitment networks for senior managers tend to be gender-biased and are likely to exclude women, which curtails their professional development and their ability to transition to other jobs. Furthermore, the large number of young women who consider the job temporary (Scholarios & Taylor, 2010) and leave the workforce to take care of family duties tends to keep them in lower organizational levels (Patel 2005). Talent management programs in developing countries are uncommon and rarely track gender participation. This limits firms' abilities to understand gender dynamics and implement interventions.

Wage discrimination and gender-sensitive employee benefits. Disparities in wages are due to slow career

⁷⁰ The number of female engineers will vary depending on specialization. The number of female engineers in some developing countries, such as India and Egypt, tends to be higher than developed economies. Many female engineers in developing countries do not, however, pursue work in that field.

Table 4.6. Gender Segmentation of Clerical, Office, and Service Jobs

Gender segmentation of back-office services	
Routine: requiring only basic skills—female dominant	<ul style="list-style-type: none"> • Data capture and processing • Customer call centers—for routine queries, order taking, and referrals • Hotel or rental car reservations • Virtual service centers (for example, home delivery pizza companies)
Discretionary: requiring technical training and problem solving—female dominant	<ul style="list-style-type: none"> • Data verification and repair (for example, optically scanned documents) • Claims processing • Mailing list management • Remote secretarial services. • Customer call centers—account queries, after-sales support.
Specialized: requiring specific expertise and managerial authority—male dominant	<ul style="list-style-type: none"> • Accounting, book keeping, payroll processing • Electronic publishing • Website design and management. • Customer call centers—problem/dispute resolution • Technical transcription (for example, medical, legal) • Medical records management • Technical online support • Indexing and abstracting services Research and technical writing

Source: Mitter 2006. Human resources practices.

development for women and wage discrimination. Women's wage growth is considerably slower than men's because of their overrepresentation lower-status, feminized jobs. In the Philippines, young Filipinas earn 13 percent less than male colleagues (Messenger and Ghosheh 2010). Policies around grievance management and the creation of an inclusive work environment are missing in many companies (NASSCOM and MERCER, 2009). Gender sensitive benefits and social protection, such as maternity leave and flexible scheduling, are not always implemented. For example, in Morocco, some call centers require women returning from maternity leave work additional hours to make up for lost time (ILO 2009). These benefits are critical for facilitating women's work and advancement and for employing valuable talent for industry upgrading.

Training programs. In India, call center training links customer service attitudes with social perceptions of mothering and servitude that affirm traditional gender roles inside

and outside the organization (Mirchandani 2005). There are few opportunities, if any, for women to receive professional development and training in leadership outside the realm of customer service. These constraints keep women in frontline work longer, limit their growth, and contribute to higher turnover rates.

Institutional Practices

Countries compete on the basis of access to highly skilled, low-cost labor. This strategy helps countries enter the chain, but it becomes problematic with regard to working conditions. Moreover, highly skilled labor in many developing countries is leaving call center work with increasing frequency as they discover the jobs are monotonous and offer limited skill development. Wage burdens encourage firms to hire temporary and part-time workers, which increases the vulnerability of workers in low-value segments of the chain. Temporary and part-time workers are often women. Labor regulation frequently fails to protect employees from

the challenges of flexible work, because governments may be hesitant to limit the country's competitiveness and curtail employment opportunities.

Gender-bias regulation. There are regulatory inconsistencies that impact women's participation in night shift work (which typically pays more) for international markets. In some countries, such as the Philippines, prohibition of night shift work for women excludes them from higher-value segments of the industry (see box 4.2). In addition, some call center firms prefer to hire men to avoid protective social regulation, such as long maternity leave, demanding childcare requirements, and transport for women who work night shifts. The industry has a footloose strategy, which makes protecting workers through regulations and organized labor difficult. Even though the institutional framework in many countries promotes at least limited workers' rights and gender equality, adequate monitoring is often lacking.

Gendered Impacts of Economic Upgrading

Understanding the relationship between economic upgrading and gender dynamics is critical in the development of firms' strategies, government's policy interventions, and development programs to ensure competitiveness and

upgrading opportunities. This understanding also is vital to ensure equitable access to the chain, better distribution of gains, and reduce risks, such as the exploitation or casualization of the workforce. The composition of the workforce and the constraints discussed above clearly show gender-intensified constraints that have potential consequences for upgrading; but upgrading also impacts gender outcomes. Generally, upgrading impacts on gender have been mixed (see table 4.7).

Entry into the chain favors female employment and increased earnings, and provides them with transferable skills. For many women, employment in the call center industry is the first time they have had access to formal employment. However, the feminization of the workforce appears to be limited to the lower-value positions and is replaced by a more male dominant workforce as the industry upgrades. For example, functional upgrading into new international markets necessitates night shift work. Due to the social challenges in hiring women for night shifts, male workers typically dominate these higher-value jobs. In addition, complex functional and product upgrading, such as business-to-business logistics or help desk support, favors male rather than female employment. Product upgrading into higher-value areas in the call center chain requires specialized technical skills and also appears to favor males in masculine professions, such as investment banking and data analysis. This partly reflects the gender bias of the industries they serve, but it is more likely the result of limited female education and training in these fields.

The consequences of these gendered outcomes and gender-intensified constraints may ultimately limit a country's ability to remain competitive and upgrade in the call center industry. As the call center and the broader offshore services industry evolve, a global war for talent is emerging whereby a country's core competitiveness is beginning to be defined by the size of its skilled labor force (Fernandez-Stark et al. 2011b). Gender-intensified constraints can reduce available labor. Limited availability of male labor due to other economic opportunities can significantly impede the industry's ability to compete and upgrade, particularly in countries with a smaller labor force.

Table 4.8 summarizes upgrading activities in the call center industry, its general impacts, and gender implications.

Box 4.2 ■ Women's Work in the Philippine Call Centers

There are about 200 business-process-outsourcing (BPO) companies in the Philippines, from small to very large; about 70 percent of them are foreign-based. The Philippines now employs 350,000 people in call centers compared with India's 330,000. Young Filipino women hold about 60 percent of BPO jobs. Most of the call centers have a larger night shift to service Europe, the United States, and other countries. Legal and social constraints limit women's work in the sector. For example, there are two conflicting Philippine laws: the prohibition of night work for women and the guarantees of equal opportunity in employment. Night work prohibitions remain the law, casting uncertainty on the future of the industry. There is now a proposed amendment, led by the Business Process Association of the Philippines, for the government to lift the ban on women working the night shift, which has prevented BPO companies from hiring more females. Under the proposed amendment, employers will be required to ensure a work environment that protects women from "fear of danger and violence in relation with working at night." There is a 30 percent night differential on top of the regular salary.

Table 4.7. Gender Impacts on Call Center Upgrading

Gender mapping	Female workers are mostly in lower-value segments of the chain.
	Feminization of the workforce is in the agent and nontechnical positions (except for specialized services that are traditionally feminized, such as nursing).
Structure of employment networks	Call center specialization and education shows gender bias. For example, call centers that hire nurses in the Philippines have higher female participation. On the other hand, call centers that use financial analysts have higher numbers of male workers.
	Captive/in-house centers offer more opportunities for training and skills upgrading. These centers tend to have less gender bias and better internal policies because they focus on retention and quality.
	Third-party providers focus on cost and offer women less training and limited upgrading potential.
	Social and cultural dynamics have an impact on women's participation in call centers that service North America (night shift). Marital and parenthood status affects turnover rates, with female workers opting to exit the job market whereas male workers opt to find higher-value employment.
Market access	Equal access for entry level but then uneven gender-biased promotion opportunities.
	Unequal in specialized call centers such as help desk because of lower number of women university graduates in technical/scientific fields.
	Unequal access to higher-value positions due to lack of professional experience and in some cases cultural constraints.
Distribution of gains	Unequal: higher female participation in lower levels of the chains and at the agent level of the organization.
	Unequal upgrading creates uneven job and wage growth.

Source: World Bank.

Country Case Study: The Arab Republic of Egypt

Egypt is the most populous country in the Middle East and the second in Africa (after Nigeria) (Euromonitor 2011).⁷¹ The country struggles with high unemployment of about 9 percent (ILO 2010)⁷² particularly among educated urban youth and female university graduates (Ahmed 2010). The country was selected as a case study because it recently emerged as a top destination for offshore services. The industry offers women significant job opportunities and the possibility of upgrading into higher-value segments. The country scores consistently well in global rankings of locations for offshore services because of its low wage rates, large supply of multilingual talent, and location. In 2010, Egypt was named "Offshoring Destination of the Year" by the European Outsourcing Association, ahead of rivals such as the Philippines, Colombia, and Sri Lanka. More recently, the A.T. Kearney Global Services Location Index

for 2011 ranked Egypt the fourth most attractive offshoring destination worldwide and number one in Europe and the Middle East and North Africa (MENA) region, up from sixth place in 2009 (Peterson et al. 2011).

The Call Center Industry in Egypt

In 2010, Egypt's offshore services industry grew about 50 percent, raising its workforce to about 28,400, with over

⁷¹ Egypt's population is estimated to be over 82 million (WDI 2011). It has the fourth largest economy in MENA after Saudi Arabia, United Arab Emirates, and Algeria (Economist Intelligence Unit 2008). Egypt has also one of the most diverse economies in MENA (Datamonitor 2010; Euromonitor 2011; GAFI 2011). In 2008/09 the industrial sector accounted for 16.6 percent of GDP, while information and communication technology, tourism, and financial services accounted for 10.2 percent, retail 11.5 percent, and agriculture 13.7 percent, respectively (GAFI 2011).

⁷² Egypt's unemployment problems and high proportion of youth population (over 40 percent under 24) made job creation one of the government's top priorities (UN Population Division 2011).

Table 4.8. Call Center Economic Upgrading and Gender Implications

Economic upgrading		Impact	Gender implications
Entering the value chain	<ul style="list-style-type: none"> Multinational firms establish captive centers Local third-party providers emerge 	<ul style="list-style-type: none"> Increase number of jobs available for college graduates More opportunities for higher-paid jobs in the formal sector Training opportunities 	<ul style="list-style-type: none"> Perception of better social skills favors feminized workforce
	<ul style="list-style-type: none"> Offer blended services 	<ul style="list-style-type: none"> Firms expand operations and create more jobs Increased pressure especially in sales (outbound) focused centers 	<ul style="list-style-type: none"> Women continue to be mostly in the lower segments of the chain Skill development is mostly in customer service
Functional upgrading	<ul style="list-style-type: none"> Complex transactions Expand geographic and customer focus 	<ul style="list-style-type: none"> Increased pay Higher skills are needed Night shift work expanded Higher monitoring Training opportunities for new technology, products, and markets serviced 	<ul style="list-style-type: none"> Higher number of men in night shift and more technical operations Women lag in management and other skills that would allow them to move into higher-wage segments
	<ul style="list-style-type: none"> Higher-value services 	<ul style="list-style-type: none"> Firms expand operations into skill intensive, higher-value segments Transactions are more complex Focus is on technical, analytical, and problem solving skills Higher worker discretion Increased pay Training opportunities for new technology, products, and markets serviced 	<ul style="list-style-type: none"> Higher-value products favor male employment due to lower availability of qualified female candidates Firms may follow gender segregation in vertical markets serviced
Product upgrading	<ul style="list-style-type: none"> Information systems upgrade 	<ul style="list-style-type: none"> Higher monitoring Increased call volume intake Higher skills in using multiple technologies to answer customer queries Training opportunities for new technology 	<ul style="list-style-type: none"> Gender neutral Virtual assistance and other processes favor both female and male workers Allows for flexing the workforce, which impacts more women

Source: World Bank.

16,000 people working in contact customer and technical centers (ITIDA 2010; Klie 2011). These centers range from small operations with about 50 agents to large ones with over 2,500 agents. Firms include a mix of foreign-owned captive centers, such as HSBC's; global service providers, such as Teleperformance; and large Egyptian-owned firms, such as Xceed. Buyers are mostly North American, European, and Arab firms, such as Microsoft, Oracle, IBM, Google, Vodafone, Intel, HP, and Novartis (Hashem 2011). Buyers come from various sectors, such as government services,

tourism, manufacturing, banking, information technology, and others. Most call centers offer customer service and technical support to customers of multinational firms in the United Kingdom, France, Germany, the United States, Canada, and a few Arab countries. Call centers are concentrated in Cairo. Recently, Sutherland Global Services⁷³ opened the first call center in Alexandria. Table 4.9 provides a summary profile of call centers in Egypt. Today, all call center types exist in Egypt and operate in multiple markets.

Egypt became a desired destination for call centers because it offers a low-cost workforce of young educated people who are fluent in multiple languages, such as English, French, German, Italian, Spanish, Greek, Russian, and Portuguese, as well as infrastructure (Gartner 2010; Peterson et al. 2011). Call centers in Egypt operate at about 54 percent of the cost of U.S. inbound voice-based customer care agents and provide lower labor costs than in other growing locations, such as Eastern Europe, Canada, and Mexico (Klie 2011). The country's location works in its favor—a flight from Europe to Egypt takes only three or four hours. Time zone similarities with Europe mean that Egypt's working hours are akin to Europe's (Klie 2011).

The industry is heavily supported by the government. Lead firms and government agencies are highly organized and collaborate on strategy, policy, workforce development, and marketing (see box 4.3). The country has actively pursued the development of information and communication technology (ICT) to attract FDI and generate employment, particularly since the turn of the century (Ahmed 2010). In 1999, Egypt established the Ministry of Communication and Information Technology (MCIT). In the early 2000s, the government developed a national ICT plan, provided tax incentives to attract multinational firms, and worked with the private sector and educational institutions to develop the offshore services industry, especially in the BPO segment. In 2006, it set up the Information Technology Industry Development Agency (ITIDA) as a quasi-governmental organization focused on improving competitiveness and developing Egypt's human capital in the sector.

Upgrading Trajectories in Egypt's Call Center Industry

The call center industry in Egypt started in the late 1990s when Vodafone UK (and its partner at the time, US Airtel) entered the market and trained workers in "customer care" (Moneim 2011). At that time, call centers were mostly captive operations that serviced the mobile telecommunication industry (Moneim 2011). In 2004, call centers started targeting the outsourcing market (Danish 2011; Moneim 2011). Egypt has been successful in the call center and BPO segment, in particular, by attracting leading transnational firms and developing Egyptian third-party suppliers (see table 4.10). Two milestones mark Egypt's call center growth: First, in the early 2000s, transnational captive call centers began outsourcing some of their customer care functions. Vodafone brought the model to Egypt, identified local third-party providers, and trained staff. These providers began serving a range of large transnational firms

Box 4.3 ■ Public Private Partnership in Workforce Development

EduEgypt started in 2007 to support undergraduate training, using soft skills, language abilities, and technical competence; it enhances the skills of university graduates and prepares them for local and global marketplaces. This effort is part of a workforce development initiative aimed at reducing the gap between student readiness and employer expectations. The initiative produced 3,000 graduates in its first year and aimed at supplying the market with 40,000 graduates per year by 2011. Female participants accounted for about 60 percent of total trainees (MCIT 2011). Leading call center firms, such as Xceed, Teleperformance, Raya, and Vodafone participate in the program and hire its graduates.

Source: ITIDA 2011.

and have continued to grow. Second, in 2003, Xceed was started as a government-owned captive center to service Telecom Egypt's customers and its IT arm. Within a year, the center was spun off from Telecom Egypt and became a third-party provider with 70 percent of its business in the export sector (Danish 2011). This center trained a large number of professionals who went on to lead other large call center operations in Egypt.

The sector upgraded rapidly, and firms have successfully moved into additional offshore services segments, achieving product, process, and functional upgrading. The sector moved beyond customer care into higher-value products, adopted new technologies to improve the efficiency of agent response, and used the workforce's linguistic strengths to expand into multiple international markets. Today, most lead firms are ISO 9000 and/or COPC certified and use international key performance indicators to monitor performance. Call centers developed corporate social responsibility programs by partnering with the government, nongovernmental organizations (NGOs), and training institutions to provide literacy training, information technology training, and to participate in community development services (Danish 2011; Shawky 2011).

Egypt has a competitive advantage in developing processes and systems in the Arabic language that are needed in the region. Local third-party providers are expanding outside Egypt by opening operations in Morocco, Saudi Arabia, and the United Arab Emirates. Moreover, Egypt is becoming a hub for the regional service

⁷³ US based global lead firm in BPO services.

Table 4.9. Egypt's Call Centers Profil

Location	Mostly in Cairo
Infrastructure	Developed communications and transport systems. Deregulated telecommunications and privatized firms. Two major technology parks in Cairo: Smart Village Cairo and Maadi Park (projected to open in 2012).
Ownership	Multinational foreign and regional firms from countries such as the United Kingdom, France, Japan, India, United States, the United Arab Emirates, and Saudi Arabia. There are also a large and growing number of Egyptian-owned companies.
Call center age	Young. On average 4–5 years old. Early entrants are a little over 10 years old.
Organizational structure	Call centers are flat with most positions at the agent level. Organizational titles are: agent, team leader, Supervisor, Senior Supervisor, Operations Manger, and Service Delivery Director.
Certifications	Centers usually have one or more certifications such as COPC 2000, ISO 9001, ISO 14001, and ISO/IEC 27001.
Call center type	Inbound, outbound, blended
Services	Voice, nonvoice, Web, e-mail, and text. Technical, nontechnical, back office, front office, sales, customer support, data mining, engineering, medial, and others.
Market segment	International, regional (MENA), and domestic. Mass market and business-to-business services.
Recruitment	Multichannel recruitment including job fairs, Internet job posting, newspaper advertising, company websites, referrals, and universities. Hiring is based on qualifications and job requirements.
Employment contracts	Full-time contracts. Both direct and subcontract full-time employment contracts are common.
Wages	Entry-level positions are usually US\$222–US\$285 a month or more. Wage determinations are based on years of experience, languages, skill, and shift.
Workforce characteristics	Workers are mostly young university graduates ranging from 22 years of age to early 30s with the majority in their early 20s. University graduates hold degrees in fields such as computer engineering, business administration, finance, tourism, literature, and medicine. Workforce is multilingual with good command of English, French, and other languages. At the agent level female workers are usually between 30–60 percent of the workforce and about 20 percent of management teams. Night shifts are mostly males. Females usually holding the top human resources and recruitment executive and management positions.
Performance measurements	Uses automated performance measurement systems, which are regularly shared with workers. Key performance indicators are used to monitor performance. Technical contact centers measure performance by customer satisfaction and problem resolution ratios.
Promotion	Limited because of flat organizational structures. Promotion opportunities exist within headquarters management and technical positions. Industry upgrading is creating higher value-added jobs in quality control, complex client transactions, training, and new company regional and global locations.
Turnover	Generally high and can reach about 30–40 percent among third-party providers that service mass markets. However, it is much lower in captive centers and technical support centers. Some centers have a 2 percent turnover rate. Tenure in centers can be 10+ years.
Training and certifications	Multiple times a year with course completion and technical certifications provided to indicate skill and proficiency level. Certifications are highly valued.

Source: World Bank, based on in country research and industry interviews.

Table 4.10. Selected Lead Firms in the Egyptian Call Center Value Chain

Company	Ownership	Locations	Regions supported	Employees	Certifications	Call center type/ services ^a / market segments
Egyptian Contact Center Operator (ECCO)	Egypt	Egypt and Saudi Arabia	North America, Europe, Middle East	1,300	COPC 2000	<ul style="list-style-type: none"> Inbound, outbound, data management, and nonvoice
Teleperformance	France	Americas, Europe, Africa, Middle East, and Asia Pacific	North America, Europe, North Africa, Middle East	1,020	ISO 9001–2000 (in the process of certifying)	<ul style="list-style-type: none"> Market research, customer acquisition, customer care, collections, technical support, outsourcing, and so forth. Business-to-business, and mass market
Wasla Contact Center (Vodafone subsidiary)	Egypt	Egypt	North America, Europe, Middle East	1,000+	COPC 2000	<ul style="list-style-type: none"> Inbound, outbound Call center consulting, market research, technical support, HR outsourcing, finance and accounting
Vodafone International Services	United Kingdom	Global with 3 locations in Egypt	Australia, Egypt, New Zealand, UK.	1,736+	ISO 9001 ISO 14001	<ul style="list-style-type: none"> Blended Sales and marketing, back office, data analytics, technical support, data management, account management, and so forth. Business to business and mass market
Xceed Contact Center	Egypt	Egypt and Morocco	France, US, UK, Italy, Spain, Belgium, Luxembourg, Germany, Portugal, Greece, Israel, Arabian Gulf	2,000+	COPC 2000 ISO 9001 ISO 14001 ISO/IEC 27001 Information Security Standard	<ul style="list-style-type: none"> Blended Customer acquisition, product services, database management, helpdesk support, order management, logistics outsourcing, and so forth Business to business and mass market
Sykes	USA	Global	Europe, the Middle East, Africa and the United States	85+ (400 seats ready; just opened)	N/A	<ul style="list-style-type: none"> Technical support
Orange Business Services	France	Global	North America, South America, Europe, Asia, Middle East	1,440+	N/A	<ul style="list-style-type: none"> Captive center Research and development, technical support

Source: World Bank, adapted from ITIDA 2010.

Note: ^a The services listed here include call center services, as well as other BPO and offshore services. COPC = Customer Operations Performance Center; ISO = International Organization for Standardization.

centers of international companies. For example, Cisco recently established an international contact center for its customer support (Danish 2011); Nokia also opened a new regional maintenance center in Cairo’s Smart Village in partnership with a Raya Holding subsidiary. LG is to open a regional technical support center in Egypt to offer services to other countries in the region. In addition, the country is investing in upgrading into high-value research and development services and has attracted in-

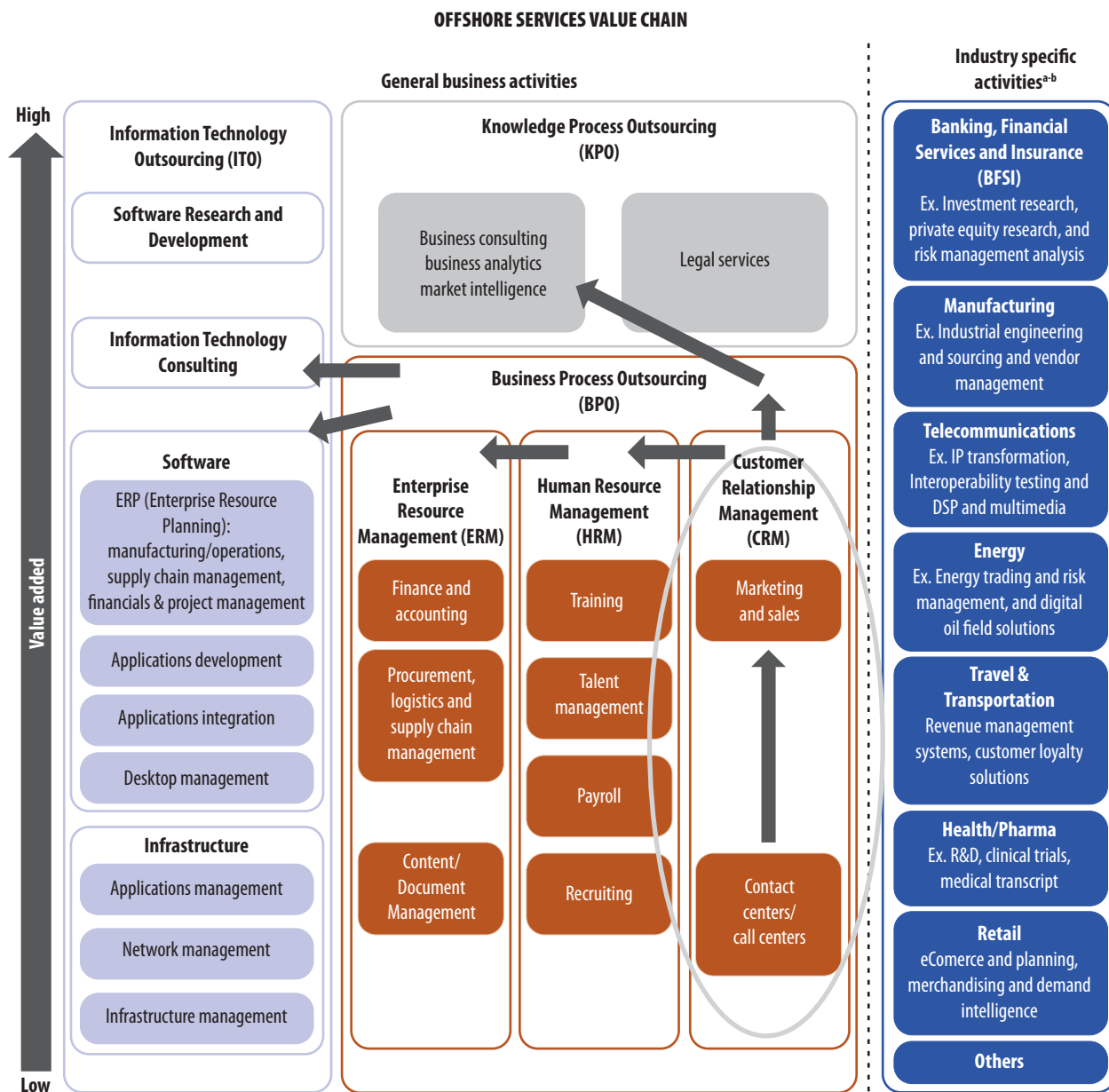
vestments from firms such as Microsoft, IBM, Orange, and Valeo (ITIDA 2010).

Figure 4.6 and table 4.11 outline the upgrading trajectories of Egypt’s offshore services industry, particularly call centers.

Gender Dimensions in Egypt’s Call Center Industry

The call center industry in Egypt is growing, and wages are generally higher than in other sectors (Gawiche 2011).

Figure 4.6 Egypt’s Upgrading Trajectory in Offshore Services



Source: Adapted from Gereffi and Fernandez-Stark 2010a.

Table 4.11. Egypt's Call Center Upgrading Trajectories

Call center upgrading trajectories	
Market entry	<p>Entering the global value chain</p> <p>Egypt entered the value chain by providing front-office and back-office customer support. The call center industry leapfrogged from providing basic services to providing more complicated transactions, such as IT technical support.</p>
Upgrading within the call center industry	<p>Functional upgrading</p> <p><i>Call center type:</i></p> <ul style="list-style-type: none"> • Contact centers shifted from responding to incoming calls to provide blended services (inbound and outbound). • Captive centers were sold or spun off as third-party providers gained access to a broader market. • There are few multinational captive centers, such as Orange, which expanded beyond call centers through the offshore services chain to provide complex technical support and business consulting globally. <hr/> <p><i>Market segment:</i></p> <ul style="list-style-type: none"> • Third-party providers emerged and are working with large multinational firms serving their customers in multiple international markets. • The industry is now servicing local, regional, and international markets in the business-to-business and mass marketing segments.
Upgrading into higher-value call center services	<p>Product upgrading</p> <ul style="list-style-type: none"> • Product upgrading by lower-value call center services helped foster functional upgrading for contact centers, which now provide marketing, data mining, and consulting services for call center customers. • Third-party, Egyptian-owned contact centers provide customized software development and systems design as well as technology consulting services for customer relationship management (CRM) and marketing. This is an important opportunity for Egypt in the development of Arab content packages for customer management in the region. • Contact centers have adopted multimodal communications: telephone, e-mail, text, and Web based.
Upgrading in call centers	<p>Process upgrading</p> <p><i>Information Technology Upgrade:</i></p> <ul style="list-style-type: none"> • The industry uses sophisticated internet protocols, CRM, and other technologies. • Call centers are using data analytics and other customer and employee management systems to improve performance, track problem resolution rates, and increase quality and quantity of responses.

Source: World Bank.

The call center workforce is comprised of young university graduates, usually 22–27 years of age (Sorour 2011). Because of this, call centers tend to have a college campus-type atmosphere. Female participation is high, particularly if compared to other formal sectors, and ranges from about 30 percent (in technical centers) to over 60 percent (Hashem 2011). Most women working in the sector come from urban areas. Women who work in the international segment are fluent in a foreign language, well educated, and usually come from the elite segments of society. Female workers generally do not work the night shift because of gender

roles, and they tend to leave the workforce when they get married or have children because of the uncertainties of the shift schedule. Neither women nor men generally think of their call center jobs in terms of gender, which is different from other sectors, such as manufacturing and construction, that are dominated by males and are perceived as men's work. Generally, the availability of jobs in the sector can empower women by encouraging them to pursue IT education and training and increasing their access to technology (Badran 2010). The gender composition of jobs

in the industry and gendered impacts of upgrading are neither measured nor tracked.

Gender Composition

Women account for about 60 percent of the workforce in most call centers. In technical support centers, which place a premium on engineering backgrounds and language skills, the Egyptian industry appears to improve the gender balance and women can account for 25–30 percent of the workforce. Females largely work as agents but can be found in supervisory and management positions, although women in senior management positions are likely to be in human resources and recruitment roles. Few women work in technical positions.

Gender-Intensified Constraints

Women in Egypt's call center industry face similar social and work structure constraints to those experienced in other countries and other segments of the economy. These constraints include levels of education, foreign language skills, time, geographical location of call centers, social and cultural norms, and management skills. These constraints limit women's access to networks and participation in higher-value activities in the chain (Mandour 2009). Government agencies in the call center industry are generally concerned with job creation and country competitiveness through FDI, but not with gender dynamics. Research on gender and women's work in offshore services in Egypt is exceedingly limited by the lack of data classified by gender. Gender participation is not tracked, employment information is not disaggregated by gender, and no explicit policies or programs to encourage female participation in higher-value activity.

Social Constraints in Gender Roles, Education, and Night Shift Work

Gender roles. Egyptian women are expected to carry out household chores and family duties after work. Although some women are able to transfer a portion of their household responsibilities by hiring domestic help, many women cannot do so. Furthermore, in some cases, women who work after marriage are stigmatized. They are expected to be less committed to their work and leave the job market once they get married or have children, which has implications for their professional development and wage growth. For example, female workers complain that men receive better treatment because they are able to work longer hours and stay late if required, as opposed to women, who frequently are unable to work overtime, especially if they are married. They also felt that additional working hours affected their family relations, and they emphasized that

“it is difficult for women to find a compromise [between work and private life] due to the burden of responsibilities on both sides” (Kärkkäinen 2010). Lack of social services, such as low-cost daycare facilities, and transportation issues further discourage some women.

Access to education and social class. Female workers in call centers are usually from the urban elite who graduated from prestigious schools and speak multiple languages. Women employed in call centers reported that developing connections and networking in the ICT field were critical to getting a job. They also mentioned the importance of obtaining skills such as language, communication and presentation skills, and résumé writing, in addition to acquiring advanced IT skills (Sorour 2011). Women who did not go to these schools and belong to lower social strata are likely to be excluded from call center employment. These women often face more complex economic burdens and are less likely to have access to networks that help them find suitable higher-value work. A small number of firms, such as Teleperformance Egypt, have developed language and other training programs in order to recruit educated women from rural areas and lower economic classes.

Night shift work is stigmatized for women. Night shift work is considered inappropriate for women, and in some call centers, no women worked the night shift. Call centers that service North American customers, in particular, often employ only males.

Chain-related Constraints to Participation through Gender-Defined Roles, Human Resources Practices, Training, and Wage and Benefit Policies

Gender roles. The frontline workforce in call centers is predominantly female. Some call center firms are trying to increase the number of male workers in frontline work, although turnover is higher among male workers, who are more likely to pursue higher-value opportunities. Firms believe female workers are likely to leave once they get married so their career commitment is lower than their male colleagues (Morsy 2011). Although women represent about 60 percent of computer engineering graduates, they are more likely to be in positions such as customer service agents or low-complexity technical support positions. Lack of services, such as career development, and little awareness of women's careers in the offshore services industry limit women's opportunities to participate in higher-value segments.

Human resources practices. Call center firms generally have policies to promote equal opportunity, but they neither track gender differences nor have programs to improve gender

balance in higher-value segments. Most locally owned firms do not have talent identification and management programs, and gender disparities in professional development target women. Women's suitability for management and leadership positions is culturally questioned, which discourages them from pursuing certain organizational roles (Kärkkäinen 2010; Morsy 2011). Mentorship programs and networks that increase women's access to higher organizational positions are generally absent.

Gender sensitive wages and benefits. Men are more likely to be promoted from customer service and agent positions to more technical roles that pay better. Also, men are more likely to work the night shift, which pays better than regular shift work. Both men and women are offered the same pay for entry-level positions. Some employers in the sector consider that labor regulation makes hiring women costly and creates organizational difficulties (Morsy 2011). For example, the labor code requires companies to provide door-to-door transportation for females from 9 PM to 6 AM (Sorour 2011). To bypass these regulations, some firms try to decrease the number of females they hire.

Access to training. Call centers invest in their workforce through intensive training and largely consider themselves gender neutral. However, a lack of gender-sensitive programming in their training practices can limit female opportunities for training and advancement. For example, one large third-party provider schedules training at night, even though management recognizes night training is difficult for women to attend because of their household duties.

Institutional Practices

Marketing Egypt as a low-cost location with highly skilled labor is a limitation. Industry institutions are marketing Egypt as a low-cost location, which puts negative wage pressures on industry workers, especially females, and increases turnover. Moreover, engaging highly skilled labor in the low-value segments of the industry increases frustrations among youth and does not fully engage their innovative capacity. This strategy is helpful to enter the BPO value chain and helps university graduates gain professional experience, but eventually leads to high turnover, which increases cost and impedes competitiveness and upgrading.

Regulation and hiring female workers. There are regulations that employers regard as burdensome and problematic, such as maternity leave, providing transport for female workers that staff the night shift, and providing access to daycare if they employ more than 100 women. Firms in the industry avoid these regulations by keeping the number

of women low (below 100), by using subcontractors, by ignoring regulation, or by simply preferring to hire male workers. The government rarely monitors gender policies and practices in firms and does not have mechanisms in place to work with the private sector to address these regulatory issues.

Gender Impacts of Economic Upgrading

Gender-intensified constraints to female participation in the call center industry encourage women to leave the workforce, negatively impact women's professional development and motivation, and discourage some call centers from hiring women. However, they also impact call centers' upgrading possibilities. Table 4.12 outlines gender participation in the chain in relation to economic upgrading.

Policy Recommendations

Offshore services GVCs have increased the number of skilled jobs available in developing countries. Expanding trade in the call center industry has generated substantial higher-wage employment opportunities for women in the formal economy, provided them with transferable skills, and increased their access to education and technology. However, a gendered GVC analysis indicates that women's roles are often limited to the lower-value segments of the industry. Women face significant gender-intensified constraints in pursuing careers in the industry, stemming from both entrenched social norms in their home country, the male-dominated corporate culture of transnational firms, and institutional practices. These constraints have implications for female workers and for the call center industry as a whole, because these constraints may limit firms' competitiveness and upgrading opportunities. Overcoming these constraints requires policies and practices from a range of stakeholders. In this section, we outline policy recommendations for a gendered approach in the call center industry to promote competitiveness and economic upgrading and to ensure that women can access the related benefits.

Traditional gender roles limit long-term female engagement in the industry as many women leave the workforce to take on childcare and domestic responsibilities. This leads to high turnover rates, and discourages private firms from investing in training for female employees. Although the call center industry typically employs young, single university graduates who do not yet require childcare facilities, leveraging the experience of these individuals is important for upgrading. Gender-based policies aimed at reducing the burden of these reproductive responsibilities are needed to free up women to allow them to participate

Table 4.12. Gender Impacts of Economic Upgrading in Egypt

Gender mapping	<ul style="list-style-type: none"> • About 65 percent of agents are females. • Night shift involves low and sometimes 0 percent female participation. • Higher male participation in quality assurance, supervisory, and technical positions. • Females account for just 10–20 percent of executives and are mostly in human resources and recruitment. There are no females in the top leadership position. • In some technical support call centers, such as Orange, female participation can be as high as 35 percent.
Structure of employment networks	<p>Export-oriented, foreign-owned captive centers:</p> <ul style="list-style-type: none"> • Offer higher salaries and more opportunities for training and advancement. • These centers tend to have less gender bias and better internal policies as they focus on retention and quality. Turnover is lower. <hr/> <p>Third-party Providers:</p> <ul style="list-style-type: none"> • Focus on cost and offer less training and advancement potential. • Some firms explicitly target males for agent positions and night shifts. <hr/> <ul style="list-style-type: none"> • Employment networks and connections are important to access employment. • Access to networks depends on factors such as social status, education, and access to the Internet and career fairs. <hr/> <ul style="list-style-type: none"> • Female workers exit the job market when they get married or have children. • Turnover among male workers is high, driven by their search for higher-value opportunities. • Employment networks are more structured towards men in the workplace.
Market access	<ul style="list-style-type: none"> • Limited in higher-value positions. • Transport services to and from call centers is a problem for women. • ITIDA does not track or monitor women's involvement in the sector. <hr/> <ul style="list-style-type: none"> • Unequal access to higher-value positions in the chain due to lack of professional experience and in some cases cultural constraints. • Most firms do not have a talent management program or programs that increase women's participation in the chain.
Distribution of gains (for example, access to training)	<ul style="list-style-type: none"> • Unequal. Higher female participation in lower levels of the chains and at the agent level of the organization. • In one firm, women did not participate in training because courses were held after 7 PM.

Source: World Bank, based on industry interviews.

in productive activities. These should include facilities such as childcare and care for elderly relatives, as well as work programs that adapt to women's schedules. These programs can be taken on by several different stakeholders in the value chain, including the private sector, industry associations, and the government. For example, Infosys India incorporated flexible schedules, part-time work, telecommuting, and sabbaticals to help women cope with the demands of their productive and reproductive work. Between implementing the policy in 2006 and 2009, the company increased the percentage of women returning

to work following maternity leave from 59 percent to 83 percent (Schomer 2010).

Career alternatives: Many women continue to opt for “socially acceptable” degrees rather than enter more male-dominated programs, such as engineering. By opting out of these programs, women often limit their career opportunities. Long-term strategies to shift social attitudes regarding career alternatives include raising awareness of advancement opportunities in the call center industry for women with technical degrees. To more quickly increase the number of women in the sector, gender-based scholarships to study technical subjects could be offered. These

programs can be promoted both within the private sector and more broadly such as by development agencies. For example, the German International Cooperation Agency (GIZ) is currently implementing the Women in Egypt at Work Program that uses photography to promote women's work in unconventional fields, including mechanical engineering. The program increases the visibility of women who tend to be overlooked because their occupations and attitudes are beyond the stereotyped "female roles," which shows the diverse career options available to women (Egypt at Work 2011). In the private sector, Orange Business Systems is attempting to increase women's participation in technical fields by developing a shadowing program for girls to encourage them to pursue careers in engineering (see box 4.4). These programs can raise awareness early on among young women about their education and career choices to increase their participation in higher-value activities. Other initiatives should take a shorter-term approach, such as easing the job search process for women graduating in these fields by actively recruiting them. For example, in India, Accenture recruits directly from women's engineering colleges and hosts women-only recruiting events. Recruiters also receive an incentive bonus for every female they hire (Wadhwa et al. 2008)

Night shift work is discouraged for women, often limiting them from access to higher-paying jobs.⁷⁴ Social constructs that prevent or limit female work at night are often deeply rooted and difficult to overcome. Nonetheless, the private sector could be encouraged to raise awareness of the type of work carried out during night shifts, which would highlight the limited differences between day and night work in call centers. This information can help shift negative social perceptions and encourage female workers to volunteer for night shifts. For example, in India, where middle-class families still shelter their daughters, family days and sports activities are organized; family

Box 4.4 ■ Orange's Shadowing Program

For several years, Orange has been committed to developing a "shadowing" program. The idea behind the program is straightforward: a schoolgirl follows a female engineer for a day to see what a scientific career is like. One of the short-term objectives of shadowing is to counter young women's preconceived ideas about the technological sector and its career paths and encourage them to pursue scientific studies.

Source: Orange 2011.

members are invited to interact with the management to reassure them that their daughters may be working unconventional hours, including night shifts, but are engaged in safe, decent, and socially accepted work (Ng and Mitter 2005). By raising awareness about night shift work, employers address negative perceptions, which can improve women's access to these jobs, lower turnover, and increase available staff.

Gender bias in role assignment in firms is common in the call center industry. The perception that women have superior social skills to men has concentrated female employment in agent work and customer and employee relationship management positions while limiting their numbers in other management and technical positions. This bias creates significant challenges for promotion and retention of female talent. In different developing countries around the world, several industries, including the BPO sector, are beginning to circumvent these challenges through the implementation of skills certification programs (see box 4.5).

Human resource practices: In addition to skills perception challenges, there are gender-intensified constraints for female employees, in particular related to promotion to management positions. Women typically do not have access to the information and support networks used to recruit and hire senior managers as these networks are typically male dominated. Policies and practices that encourage women to build their networks, such as professional women's associations and mentorship programs, can help better position women within these organizations (see box 4.6). IBM India, for example, hosts women-only recruiting events, pairs high-potential women with senior executive sponsors, and runs formal one-on-one and group mentoring for female employees (Schomer 2010).

Discrimination in wages and access to training: In many countries where the call center industry is developing, the gender gap in wages tends to be a smaller in the industry than in the broader economy. However, women in the industry face slow wage growth, which is closely linked to the tendency for women to remain in lower-paying positions for longer periods. This is partly due to the gender bias in

⁷⁴ In India and the Philippines, for example, due to time differences, the night shift serves the higher-value United States market. In other countries, such as Egypt, where the day shift serves the high-value European market, or in Latin American countries that serve the United States market during the day, this difference may not be as noticeable.

Box 4.5 ■ Philippines Association National Competency Test

In 2010, the Business Processing Association of the Philippines (BPAP) established a new National Competency Test. Interested participants complete an online test covering basic skills, English proficiency, and computer literacy, as well as behavioral competencies required for successful participation in the industry. Results are published in a hiring database available to firms in the industry to diminish both recruiting costs and to help sustain the significant demand for new employees. In multistakeholder initiatives, the BPAP has opted to share information from the National Competency Test with educational institutions to help them ensure their curriculum meets global industry requirements. The government supported this initiative through the Commission for Information and Technology by providing financing for the first 10,000 applicants to take the test for free (Valermo 2010). This system has dual benefits for upgrading: first, companies have access to gender-blind competency information about potential candidates, increasing the size of the available talent pool; second, by sharing the results of the tests with educational institutions, BPAP is ensuring that students receive better and more appropriate training prior to entering the industry. These factors will allow the industry in the Philippines to respond more quickly to demands from clients for new services.

Source: Adapted from Valermo 2010.

role assignment as described above. But it is also due to limited access to training. Given the higher rate of women leaving the industry to manage childcare and other domestic

Box 4.6 ■ NASSCOM IT Women Leadership Summit

The NASSCOM IT Women Leadership Summit provides a networking community, insight into nonconventional growth leaders in organizations, and effective training in skills and competencies for IT and BPO women professionals. The experience aims at empowering them to move forward in their careers and achieve leadership positions in their respective organizations. The Summit also highlights policies and best practices to promote gender inclusivity in the IT-BPO workforce; strategies to create women leaders; reasons why successful enterprises create and support women's networks; and how aspiring women leaders can equip themselves to reach higher positions.

Source: NASSCOM and MERCER 2009.

responsibilities, firms have lower incentives to invest in female training. Limited access to training prevents women from upgrading their skills and moving into higher-value positions. Several firms, such as Tata Consultancy Services in Chile, use comprehensive online training platforms to ensure that all employees have access to the required training tools for skills upgrading. All employees are required to complete a certain number of hours of training during the course of each month (Fernandez-Stark et al. 2010; Wadhwa et al. 2008). These systems not only circumvent challenges for scheduling training, but also minimize the marginal cost of training employees. This can help mitigate local social challenges to providing access to training for female employees and ensure that the company can develop the required human capital to upgrade into higher-value service provision.

Gender-sensitive benefits: These benefits, which include maternity leave, childcare facilities, and transport, are often considered additional costs, and many firms avoid hiring women if they can. However, the analysis of the industry reveals that female employees tend to be more loyal than male employees, and female attrition is largely attributed to the need to attend to reproductive responsibilities. Providing women with these services on site can help reduce attrition and overall cost of recruitment and training. Companies such as Accenture regularly conduct research to evaluate gender constraints in the organization globally (see box 4.7). Public provision of such public services also would be important, as discussed above.

Short- versus long-term cost/benefit analysis of social protection and gender equality. In recent years, governments around the world have sought FDI for call centers as a means of entry into the high-revenue-generating offshore services value chain. As countries have competed to attract large multinational service providers, they have offered low cost, skilled labor, tax incentives, subsidies, infrastructure, and employee training, among other benefits. This FDI attraction policy has altered the relationship between governments and the private sector, with the former becoming somewhat reluctant to lose job-generating FDI to other countries by enforcing existing social legislation or implementing new laws to protect the rights of their labor force. However, as the industry grows, the depth of the skilled-labor pool shrinks, and continued promotion of the industry leads to upward pressure on wages and working conditions. Achieving a balance between cost-based competitiveness and decent working conditions is crucial for sustainable, long-term competitiveness, skill development, and upgrading.

Box 4.7 ■ Accenture's Programs for Women's Engagement, Promotion, and Retention

Flexible work arrangements: Supports the unique needs of professionals in the workplace, encouraging a balance between work and personal priorities.

Maternity returners program: Helps ease the transition for new parents back into the workforce by providing career guidance and support for finding ideal reentry roles.

Women's mentoring programs: Pairs female executives with senior executive mentors, includes virtual workshops, and provides networking tips to help ensure the advancement of women at Accenture.

Research: The company regularly conducts studies on various topics that have an impact on women in business.

Diversity training: Raises awareness and helps develop women leaders. For example, in the Developing High-Performing Women course, female role models help managers evaluate requirements to reach the next stage in their careers. To date, more than 550 women from 23 countries have participated in the program.

Source: Accenture 2011.

Create a gender council that serves in IT, investment, and trade offices. The development of councils that deal with issues such as the environment, fair trade, workforce development, and work conditions helps bring attention to the issues and promotes their inclusion in program design, trade agreements, and so forth. Developing a council to work on gender issues in offshore services, specifically call centers, can promote women's participation in higher value-added activities. An effective gender council can provide guidance on gender dynamics and work with industry organizations to increase women's participation in higher-value segments of the chain. The council can also raise awareness about constraints women face, help design solutions to these constraints, provide guidance on gender-sensitive policies, and monitor firms' practices. The council can develop a code for best practices in collaboration with industry to promote competitiveness and address gender constraints in areas such as transport, hiring policies, and training.

Conclusions

Call centers are a young and growing industry that has captured the attention of developing countries seeking to participate in the new knowledge economy, such as India, the Philippines, and Egypt. Governments in these countries have offered incentives to attract FDI to the sector to create employment and provide an entry point into the global offshore services industry. The industry is particularly attractive as it offers higher wages and formal employment to previously marginalized groups, in particular, skilled women.

In emerging economies such as India and Egypt, the call center industry is indeed facilitating women's entry into professional jobs. In these countries, the workforce is comprised predominantly of young female university graduates. Working in a call center is often their first job. In Egypt, although jobs in the sector are not specifically considered female work, they can lead to female empowerment by increasing women's access to technical education and their participation in the workforce. However, this chapter shows that generally in the industry, as well as in Egypt as a whole, women are concentrated at the agent level, while men dominate higher-value positions in management and particularly in technical segments of the chain. There is a relatively strong gendered composition of employment in the global call center sector, sustained by gender-intensified constraints on female participation. These challenges have the potential to limit a country's access to higher-value segments of the chain in the longer term.

Because call centers in developing countries need to tap into the female workforce to address skill gaps in higher-value segments, they must address these gender-intensified constraints. Improving awareness of gender dynamics in the industry, improving human resource practices, and monitoring gender performance can increase women's engagement and skills. This in turn will enhance competitiveness and facilitate economic upgrading.

Key stakeholders—such as the public sector, private sector, industry associations, NGOs, international development organizations, and local women's associations—can drive policy changes to mitigate these constraints. Some firms and governments have already taken steps to increase women's participation. Such measures include collaboration between sector actors to identify and address barriers, improve firms' policies and practices, develop women's networks, promote mentorships, revise regulatory constraints, raise awareness, increase women's access to education, and infrastructure constraints.

Although gender constraints help drive cost competitiveness in the lowest segments of the value chain, governments need to look beyond market entry and attracting

FDI to developing the necessary factors to seize upgrading opportunities and improve access to higher-value segments.

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