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Women's Economic Empowerment in Sub-Saharan Africa

Recommendations for the Apparel Sector

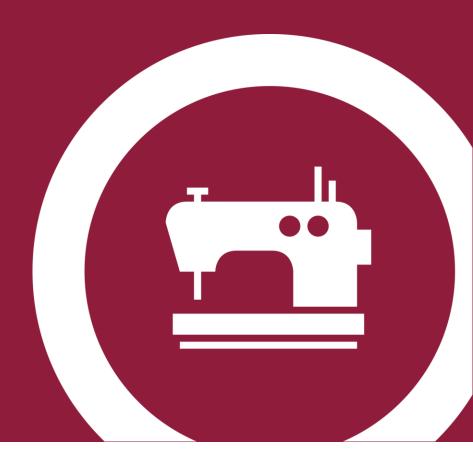








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About this Brief

This brief provides recommendations for apparel companies to advance women's economic empowerment in sub-Saharan Africa (SSA). This brief was developed alongside the BSR report "Women's Economic Empowerment in Sub-Saharan Africa: Recommendations for Business Action," which seeks to mobilize greater private-sector action to enhance women's economic empowerment in the region.

WHAT'S INSIDE

- » The Apparel Industry in SSA: Includes an overview of the apparel industry's role in SSA.
- » Impacts of Apparel Industry on Women in SSA: Shares key findings on the impact of the industry on women in SSA and some of the challenges women face in economic advancement as direct employees, participants in the value chain, and community members.
- » Recommendations for Business: Provides specific recommendations for apparel companies sourcing from the region using the Act, Enable, Influence framework illustrated on page 14. Most of the section is focused on recommendations for corporate brands that currently source from or are considering sourcing from the region. To develop these recommendations, we drew heavily from our knowledge of other regions with strong apparel sectors, learning from past mistakes and capitalizing on established best practices.

WHO SHOULD READ THIS BRIEF

This brief is intended for business leaders in CSR, corporate philanthropy, procurement, supply chain, human resources, and other functions at global brands sourcing from or with an interest in sourcing from SSA. However, many of the recommendations also are relevant for governments, development agencies, and international finance institutions.

ABOUT THE RESEARCH METHODOLOGY

The methodology for this research series included a literature review, key informant interviews, and primary research conducted in the field. While the research looked at SSA as a whole, the primary research focused on three key countries: Ghana, Kenya, and Tanzania. This brief also drew on concurrent BSR research in Ethiopia as part of a scoping study on the expansion of BSR's HERproject into that country's garment sector.

For additional information on our methodology, please see the Appendix.

ACKNOWLEDGMENTS

This brief was researched and written by Ouida Chichester and Jessica Davis Pluess, with input from Meghan Ryan, Lauren Shields, Alison Taylor, and Margaux Yost. Any errors that remain are those of the authors.

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Introduction

Africa has the potential to become a major global player in garment manufacturing. A massive labor pool, low wages, export incentives, and convenient access to both U.S. and European markets are helping make several countries in sub-Saharan Africa (SSA) increasingly attractive apparel sourcing destinations for many major brands. Capitalizing on the region's potential could transform national economies and create millions of formal job opportunities, particularly for women. To realize this potential, there needs to be a concerted effort to apply lessons from other regions and ensure that human rights, safe working conditions, and women's empowerment are priorities for brands, factories, and governments.

Rapid growth in apparel manufacturing in Asia over the last few decades demonstrated the incredible opportunity the sector presents for developing economies. The experience also revealed that if safeguards and investments to protect and empower workers are not established, the industry can present significant risks to workers' health, rights, and well-being. As an up-and-coming manufacturing hub, SSA has the potential to chart its own course as a modern, sustainable sourcing destination. In contrast to a decade ago, large global apparel brands are much more aware of the risks of outsource

manufacturing, and many have committed to responsible sourcing. It is clear that harnessing the apparel manufacturing industry can help drive economic and social development. However, brands must not use their expansion into SSA as way to avoid scrutiny of their practices. Rather, they need to apply the lessons learned from other regions and begin their sourcing relationships in SSA with clear expectations and support for responsible apparel manufacturing.

Our research revealed that the industry is already creating opportunities for women to enter the formal labor force and gain essential skills in SSA, particularly in Ethiopia, Kenya, and Tanzania. However, as the industry expands in the region, it faces many of the same challenges it has experienced in other regions, including poor working

How We Define Women's Economic Empowerment

We use the International Center for Research on Women's (ICRW) definition of women's economic empowerment: A woman is economically empowered when she has both the ability to succeed and advance economically, and the power to make and act on economic decisions. ¹

We understand that to succeed and advance economically, women need the skills and resources to compete in markets, as well as fair and equal access to economic institutions. To have the power and agency to benefit from economic activities, women need to have the ability to make and act on decisions and control resources and profits. ²

¹ Golla, et al., 2011.

² Ibid.

conditions, high turnover, and weak infrastructure. Like other women in the sector globally, women in SSA—who make up the majority of garment factory workers in the region—face risks of sexual abuse and harassment, few career-growth opportunities, and limited access to basic services. Given the lack of an entrenched garment manufacturing sector in the region, brands have a unique opportunity to change this.

The Apparel Industry in SSA

For more than a decade, Asia has dominated garment manufacturing, but with rising production costs in China, and major health and safety incidents in other manufacturing hubs like Bangladesh and Pakistan, apparel companies have been looking at new sourcing destinations over the past few years.

In 2013, the export value of clothing from Africa stood at US\$9.9 billion, but the majority of those exports came from countries in North Africa, such as Morocco and Tunisia, not SSA nations. While East Africa is experiencing growth, apparel exports from four of the key SSA manufacturing countries—Ethiopia, Kenya, Tanzania, and Uganda—are still relatively low, at US\$337 million in 2013. In contrast, China's apparel exports amounted to approximately US\$177 billion in the same year.³ At present, all of SSA accounts for less than 1 percent of global clothing exports.⁴

EMERGENCE OF THE INDUSTRY

The labor-intensive light manufacturing sector played a major role in the economic transformation of many successful developing countries. Many believe this industry will help drive Africa's development, especially given the large youth population.⁵

In the 1980s, SSA was somewhat similar to China and Vietnam in terms of development and skill levels. However, over the past three decades, the regions have taken very different paths.⁶ While there are differences across and within countries, overall, SSA had a strong textile and apparel industry in the 1960s through the 1980s. In Kenya in the early 1980s, the textile industry was the leading manufacturing activity in the country in terms of size and employment. In Tanzania in the 1960s and 1970s, the textile sector accounted for about 25 percent of the workforce. ⁷⁸

In the 1990s, the industry experienced a near collapse throughout the region, which many attribute to the huge influx of used clothes, known as *mitumba*, which increased competition from Asia, and an overall decline of the region's economies. Despite preferential trade conditions instituted in the mid-2000s, the global market downturn in 2008 thwarted the region's attempts to grow the garment sector.

³ Berg, Hedrich, and Russo, 2015.

⁴ Passariello, and Kapner, 2015.

⁵ Dinh, et al., 2012.

⁶ Ibid

⁷ PKF Consulting Ltd and International Research Network, 2005.

⁸ Kinabo, 2004.

However, this seems to be changing, particularly in East Africa. The region is becoming increasingly attractive for sourcing as major brands reassess their supply chain strategies and look to new markets in the face of rising labor costs, higher exchange rates, and other risks in existing markets. Hennes & Maurtiz (H&M) and PVH Corp. have been the most active global apparel buyers in Ethiopia and also have been sourcing from Kenya for nearly five years. Other multinational companies sourcing from the region include Asda Stores Ltd.'s George label, Belk, Gap, J.C. Penney Co., Levi Strauss & Co, PLC, Primark, Tesco, VF Corporation, Wal-Mart Stores Inc., and the German clothing company Kik Textilien. 10,11,12 It is important to note, however, that while sourcing from the region is expanding, it remains a small percentage of these brands' global purchasing.



HIGHLIGHT

Mitumba Second-Hand Clothes

Mitumba, a Swahili word meaning "bundles," refers to used clothing that arrives in Africa in bundles. The influx of cheap mitumba clothing is often credited for the decline of local textile industries throughout SSA. The second-hand clothing was first imported to the region in response to regional conflicts. In the 1990s, the used clothing ended up in the local markets, retailing at very low prices, rather than reaching their destination in the conflict zones.

While some of the clothing reached its destination, mitumba became a commercial enterprise, and it is now a lucrative business for many on the continent. A few stakeholders stated that starting a mitumba shop was the best income-generating activity available in Kenya, and if they had the capital, they would start one.

Today, charitable organizations in Australia, Canada, Europe, and the United States collect donated clothing and sell it to exporters/importers who transport it to Africa in bundles, where it is purchased by wholesalers and then sold to local retailers. The sale of mitumba clothing supports a range of informal workers, including transporters, steam-ironers, and clothes repair businesses.

Photo credit: Jonathan Torgovnik/Getty Images Reportage

A 2015 McKinsey survey of 40 chief purchasing officers in apparel companies listed Ethiopia as one of the top up-and-coming buying countries. It was the first time an SSA country made it to the top of the list. 13 Respondents expected to increase their sourcing share from the region from 0.3 percent to 2.8 percent by 2020. 14 According to brands and factory owners, Ethiopia is showing the most promise for

⁹ Passariello and Kapner, 2015.

¹⁰ Ibid

¹¹ Berg, Hedrich, and Russo, 2015.

¹² Cline, 2014.

¹³ Berg, Hedrich, and Russo, 2015.

¹⁴ Ibid.

developing garment production in Africa, but other countries, such as Kenya, Lesotho, Mauritius, Tanzania, and Uganda, are expected to gain in popularity among global buyers.

One reason the sector has re-emerged in these countries is that many governments have prioritized investment in textile and garment manufacturing industries, as a way to drive industrialization and growth. In Kenya, the government is trying to lure textile manufacturers with a substantial subsidy. Kenya is also slashing the cost of power from Ks18 (\$0.20) a kilowatt hour to Ks9 and injecting more than 5,000 megawatts of electricity into the national grid. ^{15,16} In 2014, Kenya's apparel industry was valued at US\$330 million a year and employed 30,000 workers. ¹⁷ It is not clear if government policies are taking into account the wider environmental and social impacts of growth in the sector and if they are establishing the needed protections, or if their focus on industrial job creation has eclipsed these other long-term concerns.

The textile industry's reinvigoration in SSA has not reached all countries equally. In Ghana, the industry has been gradually declining, with only about a dozen factories currently operating that employ less than 2,500 workers. ^{18,19} This is down from the 1980s, when there were more than 20 large-scale textile factories that employed more than 25,000 Ghanaians. Although the industry has potential in Ghana, which has many of the same characteristics as the East Africa countries where apparel manufacturing is growing, it has suffered from a lack of clear policy signals and incentives for buyers and factories.

COMPETITIVE ADVANTAGES OF SSA

The region is particularly attractive to labor-intensive garment manufacturing because of the large, unskilled and lower-skilled labor pool. According to UN projections, SSA will have the highest growth in working-age population anywhere over the next 20 years. By 2035, the working-age population in the region is expected to be as large as China's today—more than 900 million people.²⁰

Additionally, wages remain low, especially in Ethiopia. In 2015, the *Wall Street Journal* reported that a garment worker in China earned between US\$155 to US\$297 a month, and in Bangladesh a garment worker earned around US\$67 a month. By contrast, in Ethiopia, which has no legal minimum wage for the garment sector, a garment worker had a starting wage of US\$21 a month.²¹ BSR's research in Ethiopia found that line workers are compensated, on average, between US\$35 and US\$55 a month.²² While this may be one of the region's key attractions, the low wages are not sufficient to meet workers' basic needs and are seen as one of the main reasons for poor job satisfaction and rising employee turnover, which has reached 70 percent at some factories in Ethiopia.²³

The World Bank reports that workers in SSA are nearly as productive as workers in East Asia, including China and Vietnam.²⁴ However, based on anecdotal feedback during our research on Ethiopia, labor

¹⁵ Manson, 2014.

¹⁶ AGOA.info, 2014.

¹⁷ Manson, 2014.

¹⁸ Egu, 2009.

¹⁹ Bruce-Amartey Jr., 2014.

²⁰ Berg, Hedrich, and Russo, 2015.

²¹ Passariello and Kapner, 2015.

²² Yost and Shields, 2017.

²³ Cline, 2014.

²⁴ Dinh et al., 2012.

productivity is far behind the rates reached in Asia, with productivity listed as the top challenge for suppliers in the country. ²⁵ Low levels of productivity are likely due to low levels of education, training, and experience among workers. To address this, one factory manager we spoke with plans to bring in Sri Lankan operators to inspire increased productivity among his Ethiopian staff. ²⁶

Another advantage of SSA is duty-free and quota-free access to Western markets. Trade agreements such as the Africa Growth and Opportunity Act (AGOA), the Cotonou Agreement, Generalized System of Preferences (GSP), and Everything But Arms (EBA) allow apparel manufactured in many African countries to enter American, Australian, and European markets duty free or with dramatically reduced tariffs.²⁷ Although shifting political realities in the United States may affect trade agreements, the region currently enjoys tariff reductions of as much as 30 percent in American markets relative to Asian countries.²⁸ These trade preferences have led the industry to orient toward export markets, with most of the factories operating in special economic zones (SEZs)—some of which are designated specifically for export garment production. There also has been little effort to develop the local and regional market for locally produced garments. Presently, the region offers a limited variety of products, including readymade garments and high-volume bulk basics. Traditional textiles like Kente and wax prints also are produced but not exported in large quantities.

SSA is one of the few places where it is possible to have a vertically integrated value chain, from cotton seed to finished garment—a potential benefit given the high quality of African cotton and the increasing focus on supply chain traceability. Approximately 6 percent of global cotton production and about 18 percent of world cotton exports come from Africa, and much of the ecologically suitable land for cotton production remains unexploited. ²⁹ Despite this potential, most cotton lint currently produced in SSA is exported, and almost all of the factories we spoke with import their raw material, even in countries that have vibrant and growing cotton production. It is believed that weak institutional support, poor price transparency, and low utilization capacity in the ginning and spinning stages make vertical integration difficult. Trade preferences, which allow for some raw materials to be sourced from third-party countries, also do not incentivize local sourcing.

Although these factors make the region increasingly attractive, it faces many challenges to growth and is in significant need of investment. These challenges vary by country, but many countries experience unreliable or expensive power supply, weak transport infrastructure, outdated machines and equipment, a lack of knowledge about market requirements, a lack of trained workers, low productivity, and high rates of absenteeism and turnover. ^{30,31} This makes it difficult for factories in SSA to meet the rigorous quality and sustainability standards of global brands. One stakeholder described the situation: "A buyer from the UK has very high standards [and] can pay a little more. [However,] they want us to produce ethically. This takes money; we don't have funding."

²⁵ Yost and Shields, 2017.

²⁶ Ibid

²⁷ Ethical Apparel Africa, 2016.

²⁸ Ethical Apparel Africa, 2016.

²⁹ ODI, 2009.

³⁰ Omondi, 2015.

³¹ Berg et al., 2015.

Our research found that locally owned companies struggle to compete with foreign manufacturers in their domestic markets because they lack technical sophistication and strong business management.³² In Ethiopia, although there are a number of locally owned apparel factories, Turkish manufacturers dominate the space.^{33,34} With the construction of eight industrial parks that have been packaged for foreign development investors, the Ethiopian apparel landscape is increasingly shaped by an Asian presence.³⁵ In Ghana, apparel manufacturing is mostly controlled by small, locally owned factories and one joint-venture, Dignity/DTRT (DoTheRightThing).³⁶ In Kenya and Tanzania, the factories we visited were owned and run by foreign nationals, which we believe is the case with nearly all of the factories in the industrial parks.

Local manufacturing companies face a difficult situation. They struggle to secure long-term contracts with buyers because they lack sophistication and qualified labor. But they need contracts in order to invest in upgrades and attract and train staff. Strengthening the capacity of local manufacturers to meet the demands of global brands will help the industry realize its potential as a driver of economic growth and employment.

³² Dinh et al., 2012.

³³ Yost and Shields, 2017.

³⁴ Anadolu Agency, 2014.

³⁵ Yost and Shields, 2017.

³⁶ DTRT Apparel, 2015.

Impacts of Apparel Industry on Women in SSA

For many women in developing countries, the apparel industry has been an entry point to the formal economy, providing a step toward financial independence and a path out of poverty. Women currently make up the majority of workers in global apparel supply chains, comprising as much as 90 percent of the industry's workforce in some countries. Most of these women are young, unmarried, and have low levels of education. They often migrate from rural areas to take advantage of these low-skilled, entry-level employment opportunities.

However, in many cases, these jobs have not been enough to improve their standard of living significantly and reduce their vulnerability. Poor working conditions and labor rights violations have been endemic within global apparel supply chains. This includes low wages, excessive overtime, health and safety risks, and workplace harassment, among other issues.^{37,38} While the issues facing workers in garment manufacturing outside Africa have been well-documented, little is known about the actual and potential impact of the sector on women in SSA.

Our research revealed that the industry is providing many women with opportunities to enter the formal workforce. For example, BSR's HERproject scoping study in Ethiopia found that most women had never worked before entering the garment manufacturing workforce. If they were not working in the sector, they would most likely be at home with no income and participating in farming activities.³⁹ Our focus groups and survey in Ghana found that 36 percent of workers were in school before taking their current job, and 68 percent of the workers were between 18 and 29 years old. In Kenya and Tanzania, there was a greater mix of women who had worked in other factories or similar businesses.

Our interviews and focus group discussions in all the countries revealed that, overall, workers appreciate a job with a stable revenue stream, but in many cases, wages are insufficient to meet their daily needs. Many women are expected to divide their salaries among family members, which places additional strain. As young women, many of whom are from poor households, workers struggle with basic necessities such as health care, housing, electricity, and food. Although formal employment offers an income, women are typically found in the lowest-level positions and thus are most affected by economic instability or rising costs of living in many SSA cities.

In addition to issues around wages, there is also evidence of gaps in compliance with labor standards on working hours, and with health and safety and protections of women's rights. We learned that workers are concerned with structural workplace challenges such as low wages and lack of grievance mechanisms, as well as social workplace challenges such as relationships with supervisors and peers. They also indicated that many factories and employers do not pay for sick leave, and that there are insufficient accommodations for nursing mothers. We were told that most women leave their jobs when they get pregnant. One stakeholder said, "They look at all of the options and realize it will be too hard." For those mothers who do come back to work, childcare is a major challenge.

³⁷ Oxfam, 2004.

³⁸ Fair Wear Foundation, et al., 2013.

³⁹ Yost and Shields, 2017.

There were also health concerns related to cotton dust, the lack of personal protective equipment, and general health issues. Unlike much of South Asia, most factories do not have on-site health clinics and are not required by law to have clinics. This can make it difficult for women to get the medical care they need. Many women who join garment factories are young, in prime reproductive age, and lack basic and reproductive health knowledge. They move to urban centers, leaving their family and social networks back home. Many lack awareness of the importance of health care, don't know where to seek care, or cannot afford services. In some countries, such as Ethiopia, patriarchy also severely limits access to sexual and reproductive health services and information.⁴⁰ In Ghana, which has a national health insurance scheme, many workers indicated that it doesn't cover a lot of medicines, and governments have weakened the scheme by not reimbursing hospitals in a timely manner.

In some countries, like Ghana, our research found job security, especially for contract workers, was one of the greatest concerns. They feared interruptions in the power supply or other business problems that could lead to layoffs. One worker said, "Sometimes, because of the economy now and light outages, you get scared that ... the company can collapse." In our interviews in Tanzania and Kenya, women expressed concerns about the fact that most did not have permanent, long-term contracts with their employers.

Across all of the countries, a big concern among workers was safe and affordable transport to and from work. Infrastructure is a persistent challenge in many parts of SSA and poses significant safety and logistics challenges for workers, particularly women. Late shifts and overtime work until well after dark are common and leave workers more vulnerable to harassment and crime. In many cases, there are not affordable alternatives to public transportation. This also contributes to absenteeism and turnover, especially for women with young children and mothers who may be unwilling to make the trip to a factory for employment if they must bring their children on public transportation or poorly maintained roads. Ethiopia and Ghana are also experiencing housing shortages and rapidly rising rents.

Very few workers envision a long-term career in the industry, and when asked about their aspirations, many wanted to go back to school or start their own businesses. One stakeholder in Ghana told us that "a lot of girls join garment factories if they are not good at school." Many of the women we spoke with dropped out of school and started working in the factory. In addition to gaps in basic education and literacy, many women lack job-specific skills. It is common for girls to learn how to sew, especially if they weren't doing well in school, but these aren't the same skills required for mass production. In contrast to Ethiopia and Ghana, our field research in Kenya and Tanzania revealed that many women had worked in garment manufacturing before their current job, and had some job specific skills. Although conversations with stakeholders indicated that on-the-job training is typically offered for workers, none of the workers in our focus groups in Ghana were given such training.

Gaps in skills and knowledge also can perpetuate low self-esteem and keep women from taking on more responsibility and rising in their careers. Research in Ethiopia by Enterprise Partners discovered one factory that provided a training program for women operating machinery to become supervisors, but no one pursued that opportunity. According to the authors: "They fear the responsibility that comes with supervising others, which also indicates a lack of assertiveness and confidence in themselves." ⁴¹ We also found this to be true in Kenya, and many women in Tanzania told us they lack self-confidence. As one woman put it, they prefer to "stay in a comfortable position rather than move up the worker

⁴⁰ Doody, 2016.

⁴¹ Katiyo, 2016.

hierarchy." The absence of real mentorship and supportive supervisors contributes to poor self-esteem and perpetuates the issue of more women stuck in low-level, low-paying jobs.

These challenges are exacerbated by gender power dynamics between workers and management that have negative impacts on the health and emotional well-being of workers. Many of the workers we interviewed complained of high-stress, demanding workplaces, and aggressive managers.

They also mentioned unwanted sexual advances from managers. Although very few women indicated that they experienced violence or abuse, more than 90 percent of women in our survey strongly supported the provision of harassment-counseling services. This is not surprising, given research showing that sexual harassment and gender-based violence is often underreported. Our focus groups confirmed that reporting is a problem. One woman consulted for this research told us that many women do not report sexual harassment violations because they fear gaining a bad reputation. She said that "if you complain or report problems, you will be seen as a bad person."

Given the sheer number of women engaged directly or indirectly in the apparel value chain, the industry is uniquely positioned to advance women's economic empowerment. But to do so requires commitment and collaboration on the part of apparel companies, governments, civil society organizations, and factories to address the challenges women face in achieving their full potential. Given SSA's nascent industry, there is an opportunity to embed responsible business practices in the apparel sector from the very early stages of development and prevent some of the challenges that have plagued other regions.

Key Challenges to Women's Economic Empowerment in the Apparel Industry in SSA

Poor remuneration in the face of rapidly rising living costs: Women workers are often from poor households and receive the lowest pay, which makes it difficult for them to meet basic needs such as health, housing, transportation, food, and energy.

Limited job security due to industry instability: Women lack job security given issues that affect the long-term sustainability of factories, including rising energy costs and lack of investments and buyer commitments.

Low education and skill levels: Most women workers are young, have low levels of education, and have limited work experience. They have very little access to external training or on-the-job training opportunities to help them advance in the apparel sector or build a career elsewhere.

Lack of supportive supervisors and limited opportunities for promotion: Unclear paths forward, absence of necessary skills and education, lack of social support and self-confidence, and high turnover rates make it difficult for women to advance in their jobs.

Lack of health knowledge and limited access to services: Many young female workers lack knowledge of basic and reproductive health needs and face challenges in accessing services in areas where national health systems and facilities are weak.

Difficulty balancing work and care duties, especially childcare: Even in factories that provide maternity leave, many women quit when they get pregnant. For those who return to work, there are few, if any, affordable, quality childcare options.

Gender-based violence at home and unwanted sexual advances in the workplace: Domestic violence persists and affects women's health, well-being, and ability to contribute fully at work. Gender power dynamics between management and workers often lead to sexual harassment.

Recommendations for Business

Global buyers' expectations—from audit requirements to deadline pressures—shape the actions and decisions of other actors in the value chain. This, in turn, has real implications for workers, especially the women who are often found in the lowest-paid, lower-skilled positions. While brands are not the only actors, through their policies, practices, and influence, they can drive change both within factories and in the broader operating environment.

Most brands are aware of the human rights challenges affecting supply chain workers and understand that they have a responsibility to identify, address, and mitigate adverse human rights impacts with which they may be involved through their business relationships. Most companies already have policies, protocols, and procedures in place to communicate and enforce these expectations across their sourcing countries. The recommendations that follow are designed to go beyond these basic expectations and focus on what companies can do to help women in SSA achieve their full economic potential.

This section provides recommendations for global brands/buyers to advance women's economic empowerment through their relationships with suppliers in SSA, and through engagement with other actors and governments. Our recommendations are focused on SSA country operations but are also relevant for global corporate strategy. We use the Act, Enable, Influence framework illustrated here to describe the different levers companies can use to drive change. We have prioritized the levers and recommendations where companies have the greatest opportunity for positive impact.



Given that women play such a key role as factory owners and workers in global supply chains, the recommendations focus on steps brands can take to advance empowerment of these women. When we refer to women in the supply chain, we include indirect suppliers to factories, such as providers of catering, cleaning, or security services. We did not include upstream cotton and fabric production in the scope of this project, so women working in these areas of the supply chain are not included.

SUMMARY OF BUSINESS RECOMMENDATIONS

				1
Recommendations		Act	Enable	Influence
1.	Inclusive Supply Chains	Responsibly source from SSA to generate good employment opportunities for women. Equip procurement professionals with knowledge and tools to make sourcing decisions that positively affect wages and working conditions. Promote positive relations with suppliers through dialogue and gender-sensitive, less burdensome assessments and audit approaches.	Incentivize suppliers to advance women's economic empowerment. Strengthen access to finance, particularly for female factory owners.	Participate in industrywide efforts that advocate for responsible, inclusive sourcing, and share best practices.
2.	Gender-Sensitive Workplaces and Benefits		Promote mechanisms for women's voices to be heard and improve workermanagement relations.	Advocate for the creation of an adequate minimum wage for the sector.
3.	Education and Training		Invest in supplier capability- building and workplace training and empowerment programs.	
4.	Freedom from Harassment and Violence	Strengthen harassment policies, communication, enforcement, and accountability mechanisms.		
5.	Inclusive Communities		Partner to enhance women's economic empowerment through advocacy and access to products and services.	

1. Inclusive Supply Chains

ACT

Responsibly source from SSA to generate good employment opportunities for women.

While there are several factors to consider when determining a sourcing location and relationship, brands looking to increase their sourcing from SSA can help the sector grow responsibly by avoiding the mistakes made in Asia. This will provide a clear direction to governments and suppliers that they should invest in the skills, tools, and facilities to meet buyers' expectations. Factory owners told us that in order to grow, they need momentum, which can be provided by securing significant contracts with major players. This, in turn, can promote benefits through the region. However, it is important that the focus is not on "growth at all costs," which could have long-term effects on workers, the environment, communities, and the wider economy. Brands can encourage and mandate a more inclusive approach to growth by including women's economic empowerment in their expectations of suppliers.

Beyond signals and sourcing more from the region, brands can take a partnership approach to their engagement with suppliers. This starts by understanding the region's unique benefits in terms of design inspiration and fabric-dying techniques, as well as the untapped potential of SSA as a manufacturing power and driver of economic opportunities. Acknowledging the potential of the region, PVH is establishing long-term partnerships with suppliers to "help build a best-in-class apparel manufacturing industry in Ethiopia." As highlighted in the case study on page 19, PVH has convened a private-public collaboration with suppliers, the Ethiopian government, and donor groups to establish an industrial park in the small southern city of Hawassa. The vision is for it to be a win-win development opportunity, for both SSA and the apparel industry. 43

Equip procurement professionals with knowledge and tools to make sourcing decisions that positively affect wages and working conditions.

Procurement and sourcing professionals—including category managers, buyers, merchandisers, and supplier-relationship managers—are critical to the translation of corporate policies into practical implementation in the supply chain. Brands have an opportunity to enhance their knowledge of the issues facing workers, particularly women. By demonstrating how women are affected by procurement decisions, brands can help these professionals make more informed decisions that take gender into account. Practices including downward pricing pressure, increased quality demands, shorter time pressures, last-minute changes to product design or the order volume, and cancellation of orders all contribute to the industry's poor labor conditions, which disproportionately affect women. ⁴⁴ For several years, Primark has been providing its buyers with ethics training that is tailored to different sourcing regions. It also has clear procedures on supplier selection, which includes ethical standards that need to be met. ⁴⁵

There is a growing body of research on the relationship between product design and purchasing practices and labor-rights compliance, which can help inform sourcing decisions in SSA. One study by As You Sow features several brand practices that are helping drive improvements in wages and working conditions. Some of these practices start at the design stage. Companies like Gap and Timberland are simplifying

⁴² PVH, 2017.

⁴³ Ibid.

⁴⁴ Jurewicz, 2010.

⁴⁵ Primark, 2017.

design and reusing base fabrics and styles for several years to cut down on product changes that could lead to overtime. Some companies, like Nordstrom, are also setting clear, transparent deadlines for its own communication with suppliers on order volumes and committing to pay for lost time if they don't meet those deadlines.⁴⁶

Companies also are giving suppliers clearer expectations on minimum wage compliance and working with suppliers to meet those expectations. In countries like Ethiopia, where a minimum wage for manufacturing workers does not exist, some companies, such as H&M, are specifying a minimum wage for all factory workers.⁴⁷ In line with human rights due diligence, it is important that companies also consider whether set minimum wages allow people to meet their basic needs.

Additionally, brands have the opportunity to support suppliers in digitizing wage payments. This can capitalize on the already significant number of women using mobile money, while reducing risk and inefficiencies for suppliers and workers. BSR is working with the Bill and Melinda Gates Foundation to digitize wage payments for low-income workers in global supply chains, and these lessons could be applied to the region.⁴⁸

Promote positive relations with suppliers through dialogue and gender-sensitive, less burdensome assessments and audit approaches.

Brands can make an effort to build more trusted relationships with suppliers through more frequent visits and conversations about challenges and opportunities. This shifts the relationship with suppliers from one focused on risk mitigation to one focused on partnership and mutual goals. The factories we visited said this allows brands to gain a deeper and more personal understanding of factory conditions and the local communities, which can improve communication and problem-solving.

Most experts agree that the current audit system has failed to improve factory wages and working conditions significantly.⁴⁹ Moreover, typical codes of conduct and compliance systems do not include a gender dimension, which means many brands fail to understand the critical issues affecting large numbers of workers. Many SSA factories are smaller than their Asian counterparts, which means conducting audits for each potential buyer can be labor intensive and costly, and these audits do not always give brands the information they need to help suppliers improve working conditions.

While changing the system will take time, brands can take some practical steps to improve the audit system, making it more effective and cost efficient. To complement or replace audits, brands can employ approaches to assess and understand the local and factory conditions. One example is Social Accountability International's (SAI) social fingerprint process, which helps companies measure and improve social performance.⁵⁰ Companies such as Disney's licensee factories and Timberland use this process. Some of the factory owners we spoke with indicated that some brands have been willing to use other existing audits to reduce duplication and costly inefficiencies. Ethical Apparel Africa, as highlighted

⁴⁶ Jurewicz. 2010.

⁴⁷ Cline, 2014.

⁴⁸ HERproject, 2017.

⁴⁹ IndustriALL Global Union, 2015.

⁵⁰ SAI, 2017.

in the case study on page 17, has been working with factories in Africa to meet global brand standards on production quality and social responsibility.

Brands also can use audits and assessments to identify barriers to women's economic empowerment, better understand the specific needs of women workers, and provide tailored recommendations to factories. This can be done by including issues that affect women into their assessments and by developing post-audit improvement plans. This includes providing maternity leave and accommodations for pregnant and breastfeeding women, and addressing issues that affect workers outside of the factory walls, like lack of affordable housing or access to basic household products. Companies also can request gender- and age-disaggregated data from suppliers.⁵¹ Buyers can include incentives that encourage suppliers to incorporate gender into their assessments and decisions. For example, Levi Strauss created a supplier scorecard that includes whether a facility is participating in worker well-being programs. By expanding the scope and approach to audits, and by including additional brand visits to factories, companies can better protect women workers, uncover opportunities to serve their needs, and unlock greater productivity and well-being.

Implementing gender-sensitive auditing also will take training, which brands can support. Auditors will need to know how to spot gender issues and ensure that women's voices and experiences are accurately reflected in audit results. In 2016, BSR began working with six sustainability networks to develop a gender code guidance that companies can use to advance women's empowerment in global supply chains.^{52,53}

⁵¹ Chichester, 2013.

⁵² At the time of this report's publication, the gender code guidance was expected to be released in mid-2017.

⁵³ Wright, 2016.

CASE STUDY

Ethical Apparel Africa

Ethical Apparel Africa (EAA) is working to create a network of exceptional factories that deliver quality, cost-competitive products while empowering employees across Africa, proving that ethical and cost-effective production are not mutually exclusive. EAA currently operates in Benin and Ghana, and has plans to develop in Ethiopia and Kenya.

EAA identifies African-owned factories that have the potential to be models of best practices—factories that manufacture efficiently while putting their workers first. EAA uses a "beyond compliance" approach that involves taking the factory through a four-stage improvement plan that starts with a baseline assessment and the formation of new standard operating procedures to achieve export-standard qualities. EAA technical experts work in factories on a daily basis to tailor their plan to the factory size, product type, worker capabilities, and more, relying on input from workers, as well as middle and senior management.

This approach helps the factory develop lean principles like reducing waste and optimizing energy use, while becoming socially and environmentally conscious and remaining competitive. As the factories' revenues and exports grow, they are required to reinvest in their workers, providing higher pay, access to health care, and education. As workers experience these benefits, absenteeism falls and productivity grows. This, in turn, increases the overall efficiency of factories and creates a virtuous cycle of sustainability in the supply chain.^{54,55,56}

ENABLE

Incentivize suppliers to advance women's economic empowerment.

Brands should set expectations with their suppliers that women's rights are to be respected and championed. Specifically, brands should expect suppliers to: create and use channels for worker feedback that are gender sensitive; create spaces for women's voices to be heard; guarantee maternity leave; provide accommodations during pregnancy; and provide support for breastfeeding workers and mothers of small children, including supporting the availability of childcare in communities or in factory-based facilities. These expectations could be included in updated codes of conduct and companion supplier communications documents.

Apparel companies also can encourage more attention to women's challenges by providing incentives to suppliers that demonstrate a commitment to women's economic empowerment. These include tangible benefits like growth in business (e.g., increased order volumes or numbers), long-term contract commitments, preferential financing to incentivize better overall social and environmental performance, and the reduction of audit frequency. Other intangible benefits include granting preferred supplier status or awarding supplier awards or recognition.

⁵⁴ Ethical Apparel Africa, 2016.

⁵⁵ Ashoka Changemakers, 2016.

⁵⁶ Ashoka, 2016.

Strengthen access to finance, particularly for female factory owners.

Many of the small- and medium-sized suppliers in developing countries struggle to finance their operations. Many of these companies sit in the "missing middle"—too large to access microfinance but too small to be attractive to commercial lenders. Moreover, the commercial prime lending rate in many SSA countries is more than 20 percent.⁵⁷ This makes it difficult to invest in and upgrade facilities, equipment, and employee skills. Lack of capital also has proven to cause some factory owners to cut corners on worker safety and benefits, all of which affect women.

The problem of accessing finance is particularly acute for women. The IFC's "Women, Business, and the Law" report found that in SSA, only one country (South Africa) prohibits discrimination in access to credit. 58 Other barriers outside legal frameworks also restrict women's access to credit, including cultural norms and women's education levels.

Brands can help provide potential lenders with the confidence to lend to factory owners. One innovative approach is being employed through a partnership between Levi Strauss and the World Bank/IFC. Levi Strauss seeks to incentivize its suppliers to operate more responsibly by facilitating access to a sliding scale of lower-cost financing arranged by the IFC. Factories need to demonstrate improved performance across a number of sustainability metrics to access the financing.⁵⁹ This model can be adapted to ensure that women specifically have equal access to finance.

CASE STUDY

ANN INC.: Supplier Engagement to Improve Gender and Health Outcomes

Low-income working women often struggle to reach their full potential due to a lack of knowledge of and access to health and financial services and products. For a number of years, ANN INC. has been working to strengthen empowerment programs in its supply chain. A few years ago, ANN INC. and BSR partnered to embed women's empowerment more deeply into the company's supply chain practices and tools. This included integrating gender and health into ANN INC.'s supply management tools, including codes of conduct, supplier scorecards, KPIs, and audit protocols. ANN INC. also implemented BSR's HERhealth and HERfinance factory programs, with a commitment to reach 100,000 women in its global supply chain. Fifty percent of ANN INC. apparel is now sourced through partners trained in HERproject curriculum. By focusing on supplier engagement rather than risk mitigation, ANN INC. has strengthened its supplier relationships while having a positive impact on women in its supply chain. ⁶⁰

⁵⁷ CIA, 2016.

⁵⁸ World Bank Group, 2015.

⁵⁹ Kourabas, 2015.

⁶⁰ BSR, 2014.

INFLUENCE

Participate in industrywide efforts that advocate for responsible, inclusive sourcing, and share best practices.

The challenges facing SSA cannot be solved by one single company. Greater collaboration among industry peers is needed to strengthen the industry and develop an ecosystem for responsible, inclusive garment production in SSA—one that is rooted in gender sensitivity and equality. By working together, companies can help the region avoid the pitfalls that have affected other regions and help SSA become a modern, ethical garment-manufacturing hub.

Some good examples of this include PVH's work (highlighted earlier and in the case study below), as well as a partnership formed between H&M, the International Labor Organization (ILO), and the Swedish International Development Cooperation Agency (SIDA). This partnership aims to contribute to socially responsible development of Ethiopia's textile and garment industry. The project (funded by H&M and SIDA) will create regular forums for governments, brands, workers, and suppliers to tackle common and urgent problems.⁶¹

By working together, companies can help shape the conversation and strengthen their advocacy in host and home countries to support policies that help the industry grow and support women's economic empowerment. Companies can work through existing industry collaborations like the Sustainable Apparel Coalition to develop common standards, share best practices, and collectively voice support for investment in women's empowerment in the region. BSR HERproject and Better Work also have been active in convening brands to discuss common challenges and collective solutions.

CASE STUDY

PVH: Socially Responsible Country Entry in Ethiopia

PVH aims to create a vertical, scalable, and sustainable apparel supply chain in Ethiopia. To help fulfill this goal, it has convened a private-public collaboration with apparel suppliers, government stakeholders, and donors in Ethiopia. These stakeholders have come together to develop the Hawassa Industrial Park for PVH's apparel manufacturing. PVH estimates the park will create 40,000 to 60,000 new jobs, along with many more indirect economic opportunities for the local community.

Expanding into Ethiopia has included challenges. PVH has enlisted the support of Development Finance International, an independent consultant, which is matching public and private donors with sustainable development projects near the park. Some projects include vocational and life-skills training, transport infrastructure, and waste-management systems.

PVH also is partnering with suppliers and engaging with national and local governments to investigate trade prospects across the region. Ethiopia has significant agricultural and manufacturing potential and could attract additional brands interested in an integrated vertical supply chain. This could include all stages of apparel production, from growing cotton to dyeing fabrics to sewing the final garments. ⁶²

⁶¹ ILO, 2016.

⁶² PVH, 2017.

2. Gender-Sensitive Workplaces and Benefits

ENABLE

Promote mechanisms for women's voices to be heard and improve worker-management relations.

Our field work surfaced some examples of factory owners who have tried to get to know workers' concerns both inside and outside the workplace. Taking the time to listen to the workers has helped boost worker self-esteem and helped the owner collaborate with workers to solve problems. As one factory owner told us, "I've come to realize it isn't about handing out money; it is about listening and providing guidance—a word of advice. Help them with how to take care of their children. It has really worked. They feel like there is someone who listens and cares. It makes a huge difference." Establishing open-door policies with human resources or implementing informal feedback channels can help build trust and address problems before they escalate. A good example of open consultation practices is Nalt Enterprises in Vietnam (see case study on page 23).

In partnerships with suppliers, industry peers, and local organizations, brands can help establish channels for worker feedback that are gender sensitive and create spaces for women's voices to be heard. This could include access to confidential grievance mechanisms, implementation of digital worker feedback tools (e.g., Labor Link, Labor Voices), or the formation of women's committees. Women's committees can be in addition to formal unions, if they exist, and especially where they do not.

Ensuring women have a voice in decisions that affect them is also an important part of creating positive worker-management relations. Better Work analysis identified specific changes in management systems and incentives that can help reduce the prevalence of harassment and build more positive worker-management relations. This includes things like aligning pay for workers and supervisors so they have the same incentives and pay structures, which minimizes opportunities for abuse of power; introducing skills training to improve the management abilities of line supervisors; promoting communication across all levels of the factory; and establishing clear policies and training staff on those policies to ensure implementation and enforcement.⁶³

For these mechanisms and incentives to be effective, management also needs to be receptive to feedback and have the ability to respond to worker needs. Improving management's capacity to deal with grievances adequately is important in reducing tension between workers and management, as it helps gain workers' trust.

⁶³ Truskinovsky, et al., 2014.

CASE STUDY

Nalt Enterprise, Vietnam: Improving Worker-Management Relations through Open Communication

Nalt Enterprise, a Vietnamese garment factory, implemented a series of initiatives to improve working conditions for women and establish a family-friendly working environment. The factory took a number of steps: It built a kindergarten next to the factory, offering free school for workers' children; it initiated a program to support workers' children who have reached school age by paying annual school fees, up to and including university; it built an accredited health clinic for workers and their families; and it created an effective means of providing workers with a direct line to management through regular meetings between factory workers and the company director. The benefits from these programs have included reduced costs for the factory due to lower turnover rates, a steady downward trend in worker absenteeism, and prevention of strikes through good employee relations.

One of the most important lessons Nalt has learned is the value of listening to workers. Nalt places considerable emphasis on communication and dialogue with its 85 percent female workforce. This approach has paid off: In the factory's nine years of existence, there have been no strikes, while other local factories regularly faced lost production as a result of "wildcat" (unofficial) industrial action.

Nalt has established a series of mechanisms for consulting with workers to understand and address their concerns. In addition to identifying a regular liaison with the factory's trade union representative, the managing director holds monthly staff meetings to tell workers about the factory's upcoming orders and general business performance and provide advance notice of likely overtime hours. Workers can raise issues during the staff meeting, or they can take advantage of the human resources department's open-door policy to discuss more personal matters. Supervisors may also raise workers' issues with senior management during daily production meetings. Workers appreciate this approach, which contrasts strongly with the purely production-focused approach adopted by many other factories.⁶⁴

INFLUENCE

Advocate for the creation of an adequate minimum wage for the sector.

Brands can also advocate for host country governments to establish and/or increase minimum wages for manufacturing workers. ⁶⁵ Our HERproject scoping study in Ethiopia found that wages contributed significantly to poor job satisfaction. Low or nonexistent mandated minimum wage standards are often used to attract buyers seeking low-cost labor. But this has serious implications for workers.

⁶⁴ IFC, 2013.

⁶⁵ Center for American Progress, 2013.

One of the ways brands can encourage better wage standards is by supporting collective bargaining, which allows employers, employers' organizations, and trade unions to address work-related issues together and negotiate an agreement. There are a few successful examples of these agreements in the apparel sector. In May 2013, a collective agreement covering all workers in Jordan's apparel sector was made to regulate working hours, wages, and health and safety. Thanks to the

How We Define Adequate Wage

In this report, we refer to an "adequate wage" as one that provides the financial means required to purchase the goods and services needed to achieve a basic standard of living.

agreement, the number of industrial disputes has been reduced, bringing greater stability to the sector. Better working conditions have resulted in a reduction in staff turnover, which has increased productivity and allowed Jordan's garment sector to grow rapidly.⁶⁶

One promising initiative that could be applied in SSA is ACT (Action, Collaboration, Transformation). An initiative that includes international brands, manufacturers, and trade unions, ACT aims to improve wages by establishing collective bargaining in key garment and textile sourcing countries, supported by world-class manufacturing standards and responsible purchasing practices.⁶⁷

3. Education and Training

ENABLE

Invest in supplier capability-building and workplace training and empowerment programs.

Research by ICRW, BSR, Levi Strauss, and others has shown that female factory workers globally have significant knowledge and skill gaps around three key areas that can be effectively met through workplace-based programs: health and wellness, financial literacy, and professional-advancement opportunities. Evaluations of training programs targeting women have demonstrated that effective workplace programs in these areas also deliver business benefits, including increased productivity, reduced absenteeism, and improved employee satisfaction.^{68,69}

Brands can develop or join existing industrywide programs that seek to strengthen basic literacy and education, as well as job-specific and life skills for workers. These programs include Better Work, Ethical Apparel Africa, and BSR's HERproject.^{70,71}

Our Ghana survey results revealed that women in the garment industry are interested in continuing their studies and would want to receive financial aid for studying outside the factory, night or weekend training outside the workplace, or unpaid study leave. Overwhelmingly, the women noted that they needed additional education to advance in their careers in apparel and that existing on-the-job training was insufficient. It also revealed that some of their most valuable skills have come from informal mentorship

⁶⁶ ILO, 2015.

⁶⁷ IndustriALL, 2015.

⁶⁸ Yeager, 2011.

⁶⁹ Nanda, 2013.

⁷⁰ BSR, 2017.

⁷¹ HERproject is a collaborative initiative that strives to empower low-income women working in global supply chains. Bringing together global brands, their suppliers, and local NGOs, HERproject drives impact for women and business via workplace-based interventions on health, financial inclusion, and gender equality.

programs (see highlight box on page 25). Brands should explore opportunities to advance women's educational opportunities in partnership with their sourcing factories. This can help build the talent pipeline of designers, human resources professionals, and managers who can lead a world-class apparel industry in SSA.

HIGHLIGHT

Beyond Training: Helping Women Achieve Their Potential

While formal training and education programs are important, our research revealed that this is not the only way (or in many cases, enough) to help women gain the skills and confidence they need to advance and realize a career in apparel manufacturing. Skills training should be coupled with mentorship and one-on-one "counseling" between workers and their superiors, or with a dedicated human resources team. These relationships can be used to build workers' confidence and help identify high-potential women.

Given the high pressure and difficulty of balancing work with household demands, not all women are interested in or able to take on more leadership responsibilities. One factory owner in Ghana told us that she identifies workers with potential and gives more responsibility to build their natural capabilities. "Some people are not leaders," this factory owner told us. "It is important to look for leadership qualities and then seek out special training for high-potential workers to rise in their jobs."

4. Freedom from Harassment and Violence

ACT

Strengthen harassment policies, communication, enforcement, and accountability mechanisms.

Brands can help prevent sexual harassment and ensure proper remediation if it occurs by communicating and enforcing no-tolerance policies, helping factories establish anonymous reporting mechanisms, and working with factories and community partners to provide referrals to counseling services. Cultural norms that sanction certain behavior toward women can be difficult to overcome. Thus, it is important that any efforts to improve policies and enforcement are coupled with awareness-raising and educational campaigns in the workplace and, in some cases, in communities.

While many factories have sexual harassment policies, women involved in our research indicated that factories need to do a better job communicating a clear policy and disciplining employees who violate the policy. Brands can help ensure that policies are communicated, understood, and enforced. This includes clarifying their own no-tolerance policies and accountability procedures with suppliers. Of the women we surveyed in Ghana, 96 percent indicated that clear policies and the discipline of employees who abuse or make unwanted advances to women would be very helpful. Additionally, 88 percent indicated that hotlines to report abuse or unwanted sexual advances in the workplace, and access to counseling for women who have been abused at work or home, also would be very helpful.

Some women said they feared reporting harassment. One woman noted: "If and you go and report it, it might seem like you are complaining too much. So, I just feel like keeping quiet, praying over it, and then ignoring it." Companies can ensure a functioning grievance-reporting system and include written anti-retaliation clauses in the reporting system, whereby workers can report retaliation, seek investigation, and obtain redress.⁷²

However, one-way communication is not enough. It is also important to train workers on how to navigate their workplace systems and policies, and to ensure that management responds to issues raised. This can be done through training and other forms of engagement with management. One example of workplace-based efforts to address sexual harassment include work by the Fair Wear Foundation to set up antiharassment committees and violence-prevention systems in various export-oriented garment production sites in India and Bangladesh. It included training for management and workers on violence against women, and the launch of antiharassment committees run by workers. The project also builds community networks and supports worker helplines and other services.⁷³ Brands can encourage the launch of similar committees in SSA.

5. Inclusive Communities

ENABLE

Partner to enhance women's economic empowerment through advocacy and access to products and services.

Brands can pursue partnerships at the local and global levels to address the specific challenges facing workers, particularly women. Supporting local and global organizations can build an enabling environment and network of actors for women's economic empowerment. It also can help address key gaps in skills and access to goods and services for workers, while addressing some of the cultural barriers that hold women back.

Our field research revealed that financial resources to secure housing is one area of need. Stakeholders in Ghana told us that landlords typically require a rent deposit covering between six months and two years, which is difficult for factory workers. One factory owner in Ghana allows new employees (many who come from far away) to stay in a factory-owned apartment for six months so the employees can save enough for other accommodation. Yet this may not be feasible for every factory. Brands can facilitate partnerships with microfinance institutions to provide loans to workers to access safe and affordable housing. The Center for Affordable Housing Finance in Africa could provide an entry point to interested, credible lenders.⁷⁴

Company foundations or charitable-giving arms can play a powerful role in building grassroots advocacy organizations and service providers that can help women workers by shaping societal expectations of women and men. This also should include support for organizations that engage men in tackling gender inequality.

⁷² Human Rights Watch, 2015.

⁷³ Fair Wear Foundation, 2015.

⁷⁴ CAHF, 2017.

For instance, the Levi Strauss Foundation supports organizations focused on human rights, social justice, and worker rights and well-being. The foundation has supported organizations such as Sociedad Mexicana Pro Derechos de la Mujer, which provides technical and capacity-building assistance to organizations supporting women's labor rights in Mexico. It also has supported the Association Maria Elena Cuadra Movement of Women Workers and Unemployed Women to develop training on labor rights and responsibilities, and health and asset-building for women apparel workers in Nicaragua. The foundation also supports women's human rights around the world through grants to organizations like the Global Fund for Women and Urgent Action Fund for Women's Human Rights.⁷⁵ Similar organizations focusing on women's, labor, and human rights exist in SSA, and brands can support their efforts.

⁷⁵ Levi Strauss, 2016.

Appendix

Research Approach

PURPOSE

The purpose of the research was to understand the major issues holding back women in SSA from achieving their full potential, and to identify practical actions companies can take to advance women's economic empowerment. To do so, we investigated the barriers to women's economic empowerment in the region, and how business interacts with and affects women who serve as employees, participants in value chains (including direct suppliers, distributors and

GHANA

entrepreneurs, and customers), and members of communities where companies operate. Our analysis takes into account the wider economic, social, cultural, and political conditions of SSA that help or hinder women's advancement.

SCOPE

While the research looked at SSA as a whole, we focused on three countries—Ghana, Kenya, and Tanzania—to provide greater depth and specificity, as well as to test and validate the more general findings. We

selected these countries in part for their geographic diversity (spanning western and eastern SSA), differences in GDP per capita (just over US\$1,300 for Ghana and Kenya, but under US\$900 in Tanzania),⁷⁶ and differences in women's status in society (Tanzania lags behind Ghana and Kenya, especially in terms of high rates of child marriage and violence against women).

To develop the broader recommendations for business, we investigated commonalities and differences among three key industries: apparel, mining, and mobile telecommunications. We chose to focus on these industries because of their current or potential importance to the region's economies, their strong representation among BSR member companies, and the differences in levels of maturity among the industries in the target countries.

These three industries have very different histories and growth forecasts in SSA and in individual countries in the region. Due to their businesses models and activities, their value chains look different, as does the way they impact and contribute to society.

⁷⁶ World Bank, 2015.



Apparel: SSA's apparel manufacturing industry experienced a steep decline after the 1980s, but, recently, East Africa, particularly Ethiopia, Kenya, and to a lesser degree, Tanzania, has received a boost from international brands that are interested in expanding sourcing from the region. In other countries, like Ghana, the apparel industry continues to struggle to attract international buyers.

Mining: The mining industry has been operating in many SSA countries, including Ghana, South Africa, and Tanzania, for decades. Mining contributes significantly to those countries' GDP; however, in Kenya, the mining industry is just getting a foothold. Across the continent, most of the industry's activity is in the exploration, construction,

and production phases, with just a small portion of natural resources being sold for local consumption.

Mobile telecommunications: The mobile telecommunications industry is a newer industry that has seen rapid growth, with more than 100 percent mobile phone penetration in some countries due to multiple phones per user. While it is growing throughout SSA, the industry is particularly strong in Kenya, which has been called the "Silicon Savanna." The industry is rapidly evolving, with new mobile products and services and expansion into rural markets in the face of growing competition in cities and in traditional middle- to high-income demographics.

Although some research has been conducted on how these industries are affecting women globally, little of this research focuses on SSA, and not much research at all looks specifically at women who are directly employed by these industries. While we focused our research primarily on women employees, we also explored how business can strengthen opportunities for women engaged in the value chain, including direct suppliers or contractors, distributors, entrepreneurs, customers, and community members.

CORE FRAMEWORKS

In this report, we use two frameworks: the building blocks of a holistic approach to women's economic empowerment and Act, Enable, Influence.

This report builds on previous research by BSR and other organizations, which established that effective business strategies to women's economic empowerment require a holistic approach that addresses underlying systemic issues, including economic, social, cultural, and political barriers to gender equality and women's empowerment.⁷⁷ These factors affect all members of society, but they often have a disproportionate effect on women in SSA because of their lower economic and social status, overwhelming presence in lower-paying jobs, limited access to finance, and position as the primary caregivers for children and family members.

⁷⁷ Davis Pluess and Pruzan-Jorgensen, 2016.

As a basic framework, we use eight building blocks to a holistic approach to women's economic empowerment developed by the ICRW, Dalberg Global Development Advisors, and the Oak Foundation.⁷⁸ We added to that framework the contextual factors we found relevant to SSA.

Our research recognizes that companies can pursue many different strategies to drive change. Every company can take action in areas under their direct control, and they can also enable and influence actions by others by providing incentives, partnering, and communicating with other companies, partners, individuals, and policymakers. In recognition of this, our recommendations are based on a framework for business action that features three elements: Act, Enable, Influence. In this report, we have prioritized the areas where companies are likely to have the greatest impact on advancing women's economic empowerment.

We developed our recommendations by considering the barriers to women's economic empowerment in SSA, the specific challenges faced by women in the focus industries, and the most powerful actions companies could take to affect change.

Methodology

Our research methodology included three main components: literature review, expert interviews, and primary research conducted in the field. This triangulation of methods allowed us to capture the viewpoints of a range of experts and individual stakeholders in order to identify relevant recommendations for companies operating in SSA to advance women's economic empowerment. It is not intended to forecast the impacts of the industry on women or the implications for women of changes in these industries.

LITERATURE REVIEW

The research began with a review of existing studies by academia, national agencies, and international and African development organizations on the challenges and opportunities facing women in the region. We focused on the economic, cultural, and social conditions at the regional level, with specific attention given to Ghana, Kenya, and Tanzania. We also reviewed relevant corporate sustainability reports and other reports on business engagement in women's economic empowerment to establish a foundation of knowledge and assumptions on the risks and opportunities for business in promoting women's economic empowerment. Here again, we applied a specific emphasis on SSA and the three focus countries.

We also conducted a more focused review of literature and perspectives on apparel manufacturing, mining, and mobile telecommunications, including their presence in the region and impacts on society and women. We also reviewed literature that highlighted industry best practice from other regions, including Latin America and Asia, to provide insights into feasible recommendations for the three focus industries.

We conducted extensive desktop research and based our research on BSR's experience of women's economic empowerment, credible third-party sources, and existing knowledge of SSA. However, our research does not provide a comprehensive assessment of all public record resources available. In addition, our analysis is based on data covering SSA, with a particular focus on Ghana, Kenya, and

⁷⁸ The building blocks framework was first introduced by ICRW, Dalberg, and the Oak Foundation in "The Business Case for Women's Economic Empowerment: An Integrated Approach." BSR expanded on this framework in another report, "Building Effective Strategies for Women's Economic Empowerment," and in "Women's Empowerment in Global Value Chains," in partnership with Women Deliver and the Ministry of Foreign Affairs of the Netherlands.

Tanzania. When data for SSA were unavailable, we used statistics from Africa more broadly. While an historical perspective is important to understand progress made on women's economic empowerment over time, our findings focus on the current situation of women in SSA.

EXPERT INTERVIEWS

We engaged three different groups of experts in interviews to validate our literature review, provide additional insight on challenges and opportunities, and inform our primary research questions and approach. In total, we conducted more than 20 interviews with experts from these three groups:

- » Civil society: This included representatives of development agencies and NGOs that are active in promoting women's rights and empowerment. Many interviewees had expertise in SSA and/or specific focus countries and/or they have worked with women engaged in or affected by specific industries. These interviews surfaced common challenges and success cases in the region and/or industries and identified a number of key stakeholders for the primary research.
- Companies: To complement the literature review, we also engaged representatives of the apparel, mining, and mobile telecommunications industries to understand current activities in the region, as well as barriers and areas presenting opportunities for companies to drive greater action on women's economic empowerment generally and in SSA.
- » BSR experts: This included BSR industry and issue experts who provided global lessons and industry-specific challenges and opportunities to promote women's economic empowerment.

PRIMARY RESEARCH

Our primary research sought to uncover specific and empirical insights into the experiences of women who work in, have business relationships with, or are otherwise economically affected by the apparel, mining, and mobile telecommunications industries in Ghana, Kenya, and Tanzania. We conduct semi-structured interviews with people in companies from these industries that are operating in our focus countries. Where possible, we engaged companies that have operations across the region for a cross-country comparison. We conducted additional semi-structured interviews with women's empowerment organizations, international development NGOs, international finance institutions, and other agencies with a focus on women. With these groups, we focused on the underlying issues that prevent women from succeeding and achieving economic empowerment. In total, we conducted more than 40 stakeholder interviews across Ghana, Kenya, and Tanzania.

Our on-the-ground research in Ghana with local women employed in the apparel, mining, and mobile telecommunications industries used two data-gathering techniques: qualitative (focus groups), followed by quantitative (surveys). We targeted women who were directly employed by these industries, as well as women in the direct supply chain, including women who provide direct services to the industries (such as cleaning and catering services). We worked closely with two local Ghanaian firms and Charney Research.

For the qualitative phase, we conducted four focus groups, with a total of 28 working Ghanaian women, between May 23 and 25, 2016. We conducted two groups in Accra: one with seven women in the ICT sector, and another with 10 women in the garment manufacturing sector. We held the other two in Tarkwa, a mining center 180 miles north of the capital, with seven and four women working in the mining sector. The discussions were two hours long and were preceded by short surveys that addressed topics not covered in the groups. A local Ghanaian research firm recruited and moderated the focus groups. We

provided standard research incentives for participation: about \$25 for managers and executives, and about \$20 for factory workers and food and cleaning services personnel.

For the quantitative phase, we spoke with 50 women from each of the three focus industries—150 women total. Between May 27 and June 24, 2016, the local Ghanaian research conducted in-person surveys among employees of firms in the relevant sectors. They interviewed ICT and apparel employees in Accra and interviewed mining employees in Tarkwa. We set two additional quotas to ensure that we covered a representative sample of women in these industries: 50 percent direct employees (from 37 companies) and 50 percent supply chain (who provide service to 32 companies), and 16 percent management and 84 percent rank-and-file workers within each of those categories.

We supplemented this detailed information from Ghana with additional focus groups in Kenya (two with women in the apparel sector) and Tanzania (one with women in the apparel sector and two in the informal sector) to validate or contradict what we found in the detailed surveys and focus groups. In Kenya, we conducted these interviews and focus groups with BSR's native Kenyan consultant and a BSR staff member, and in Tanzania, we conducted the focus groups with a local contact. We also drew on a parallel study conducted by the BSR HERproject in Ethiopia to inform our work in the apparel sector.

RESEARCH LIMITATIONS

While we used Ghana, Kenya, and Tanzania as illustrative examples of wider trends throughout SSA, it is important to recognize that the individual country context varies. As a result, there are limitations in applying the findings and recommendations to every context within SSA.

We conducted our fieldwork over the course of three weeks, with one week spent in each country. Given the industries selected and the research we conducted, this report primarily focuses on women in urban areas, except in the case of mining. Coverage of mining areas was limited to the focus groups and surveys in Ghana. Much of the experience of rural women was not taken into account in this report. Our report focused on adult women, not on girls or adolescent girls.

Our approach did not include direct fieldwork with communities, aside from engagement with women employees and workers in the supply chain who shared views on the communities. As a result, the findings on communities drew heavily from existing literature rather than primary research.

The team composition for the fieldwork was based on relevant background and experience in women's empowerment, and it included BSR team members who are not from SSA. The in-country interviews (excluding the focus groups and surveys in Ghana) were not conducted by local nationals, with the exception of our local Kenyan consultant, who supported the research in Kenya and Tanzania.

The workers for the qualitative focus groups were not recruited using a statistically random sample, such as is used in polls; therefore, the qualitative results of this study are not directly projectable to the working population at large. Nevertheless, the findings elaborate on the quantitative data and offer deep insight into the minds and daily lives of these Ghanaian women workers.

With the quantitative data, the sample size of 150 was relatively small; the margin of error for the full sample is 8 percent, and for each sector subsample (50 participants), it is 13.9 percent, at a 95 percent confidence level. The results offer a detailed view of women workers in these three industries in Ghana. Although the data cannot offer a definitive picture of African women workers in other industries within and

outside of Ghana, it offers useful indications of their lives, experiences, and challenges, and what they want from employers.

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