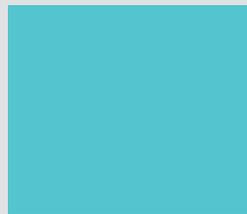
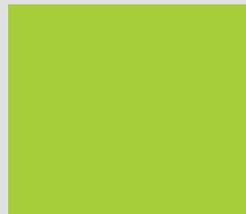


Social and Gender Survey Report



JICA
Project for Skills Development and Market
Diversification (PSDMD) of Garment Industry in Pakistan



Social and Gender Survey Report

JICA Project for Skills Development and Market Diversification (PSDMD) of Garment Industry

2016-2017

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The Social and Gender Survey Report (hereinafter called as “the report”) was produced as one of the outputs of an activity of Japan International Cooperation Agency (JICA)’s technical assistance project entitled “Project for Skills Development and Market Diversification (PSDMD) of Garment Industry in Pakistan”. The whole work prepared by the survey project team led by project members from the following organization.

- Ministry of Textile Industry (MINTEX), Pakistan
- Pakistan Readymade Garments Technical Training Institute (PRGTTI)
- Pakistan Knitwear Training Institute (PKTI)
- Female Exclusive Training Institute (FETI)
- Pakistan Readymade Garments Manufactures & Exporters Association (PRGMEA)
- Pakistan Hosiery Manufacturers & Exporters Association (PHMA)
- Faisalabad Garment City Company (FGCC)
- Japan International Cooperation Agency (JICA) Expert Team on PSDMD

The report would not have been possible without the valuable information provided from generous volunteers; female respondents in communities and respondents from apparel and textile companies. The survey project team wishes to acknowledge all the generous cooperation of coordination and support provided by Masood Textile Mills Ltd. and local NGOs; Lyallpur Development Organization, Humkhayal Organization and Roshan Pakistan Organization.

1. Research Objectives

The Social and Gender Survey (hereinafter called as “the survey”) was conducted in order to understand the current situation, needs and challenges faced by women regarding studying and working within the apparel and textile industry, as well as the challenges facing companies regarding the employment of women. The results of the survey will be utilized in the activities by Public Private Partnership Taskforce for Women Empowerment in JICA PSDMD Project to promote female participation across the industry and to enhance public and private collaborations.

The research objectives are as follows:

To find out:

- The motivation of females regarding study and work in the apparel/textile industry
- The challenges faced by women when they study and work
- The expectations of women from training institutes and apparel/textile companies
- How much access women have to information regarding training institutes and companies
- The channels and means used by women to access study and work information, and the channels and means used by companies for the recruitment of women
- Companies’ needs regarding female employment and human resource demands in the apparel/textile industry
- Challenges faced by companies in the apparel/textile industry regarding female employment
- About work environments, facilities and benefits provided by companies in the apparel/textile industry for female employees

2. Methodology and Samples

The survey has two dimensions. One is to understand the current situation, needs and challenges of women who can potentially be trainees for training institutes in the community. The other dimension is to understand the needs, challenges and current situation of the work environment regarding female employees of the companies in the apparel and textile¹ industry.

Firstly, the survey was conducted to interview 75 women as potential trainees for the training institutes who were selected by Pakistan Readymade Garments Technical Training Institute (PRGTTI) and Pakistan Knitwear Training Institute (PKTI) from Lahore, Female Exclusive Training Institute (FETI) and Faisalabad Garment City Company (FGCC) from Faisalabad. Women who live near the training institutes were selected from Lahore and Faisalabad, and ranged in age from 15-46. 42 women out of 75 were single and 33 women were married.

Table 1. Breakdown of Respondents by Area and Marriage Status

Training institutes	District	No. of single women	No. of married women	Total
PRGTTI	Lahore	18	13	31
PKTI	Lahore	9	12	21
FETI	Faisalabad	15	8	23
Total		42	33	75

Secondly, the survey was conducted to interview 67 small, medium and large apparel and textile companies, registered by Pakistan Readymade Garments Manufactures & Exporters Association (PRGMEA) and Pakistan Hosiery Manufacturers & Exporters Association (PHMA) in Lahore, as well as companies located within FGCC and registered and non-registered companies by PHMA in Faisalabad. The definition of a company's size is taken from the State Bank of Pakistan, that is, small: fewer than 50 workers; medium: 51-250 workers; and large: more than 251 workers. The interviews were mainly conducted with Directors, CEOs and Managers in HR including other departments such as Marketing and Production of the targeted companies.

Table 2. Breakdown of Respondent Companies

Associations	District	No. of large companies	No. of small and medium companies	Total
PRGMEA	Lahore	19	11	30
PHMA	Lahore	9	9	18
FGCC/PHMA/Others	Faisalabad	10	9	19
Total		38	29	67

¹ The majority of the surveyed companies are apparel industries, which includes garment and socks manufacturing, and some of the companies are part of the textile industry which includes home textiles such as bedding products.

3. Findings of the Survey

3-1 Survey of 75 Women in Lahore and Faisalabad

3-1-1 Women's Relationships within the Apparel and Textile Sector

21.3 % of 75 surveyed women in Lahore and Faisalabad had family members who are studying or have studied at apparel and textile training institutes. 9.3 % of the women had extended family members and 4 % of the women had friends who are related to the training institutes of apparel and textile (Figure 1).

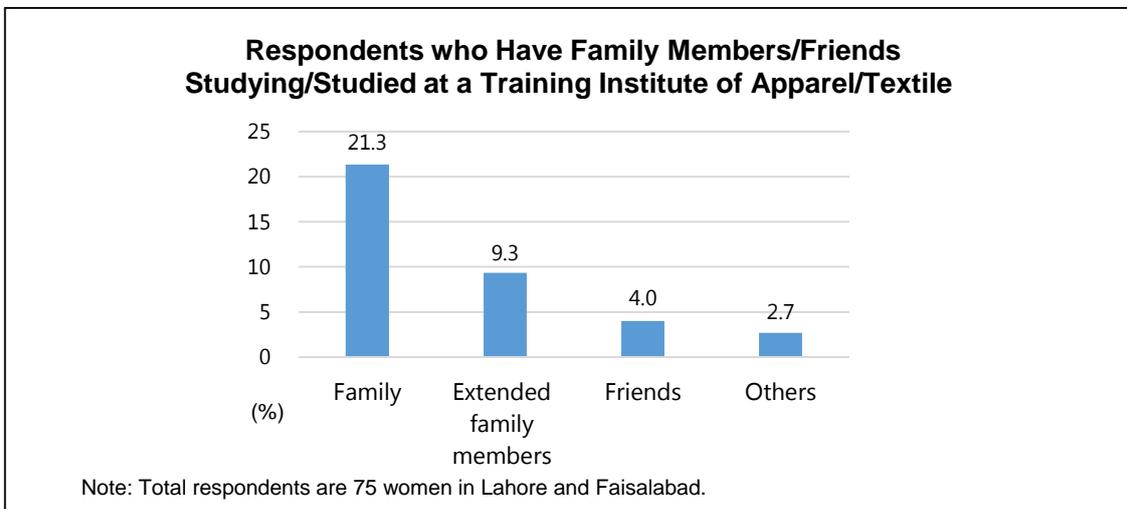


Figure 1. Respondents who Have Family Members/Friends Studying/Studied at a Training Institute of Apparel/Textile

30.7 % of the women had family members who are working or have worked in a company of apparel and textile and 16 % of the women had friends, and 10.7 % of the women had extended family members related to apparel and textile company (Figure 2). The majority of the women answered that their family members, relatives and friends work for garment factories. A few women answered that their family members own their boutiques and work from home on stitching.

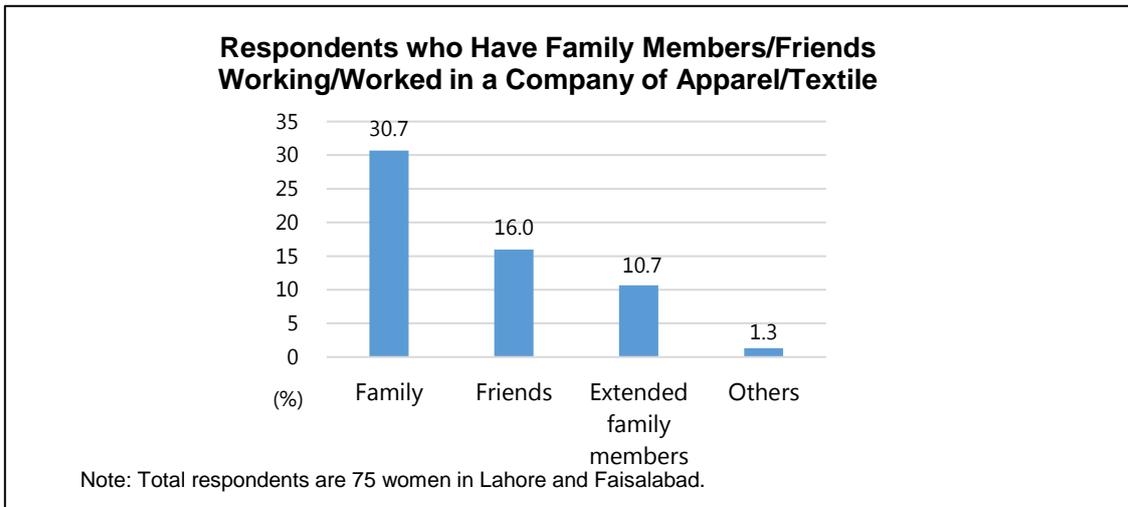


Figure 2. Respondents who Have Family Members/Friends Working/Worked in a Company of Apparel/Textile

3-1-2 The situation of Women in Studying

3-1-2-1 Women's Motivation for Studying

According to Figure 3, 96 % of the women in Lahore and Faisalabad showed interest in studying about the apparel/textile industry, while 4 % of women did not show interest. The reason why some women said they are not interested in studying in this industry was that it is difficult to study due to child and family commitments.



Figure 3. Are You Interested in Studying Apparel/Textile?

Figure 4 shows that “Stitching” and “Fashion Designing” were women’s most preferred courses in Lahore and Faisalabad. 31 of these women preferred Stitching courses while 28 women preferred

Fashion Designing courses. Besides these two courses, Pattern Drafting and Grading, CAD-CAM and Quality Control courses were also mentioned, but were less popular amongst women. These three courses are highly technical courses. All of the women who mentioned these three courses have family members, relatives or friends who have either studied in a training institute or worked at a garment company. It is suggested that those courses which are less popular amongst women should be promoted and advertised more to help raise awareness and encourage greater participation.

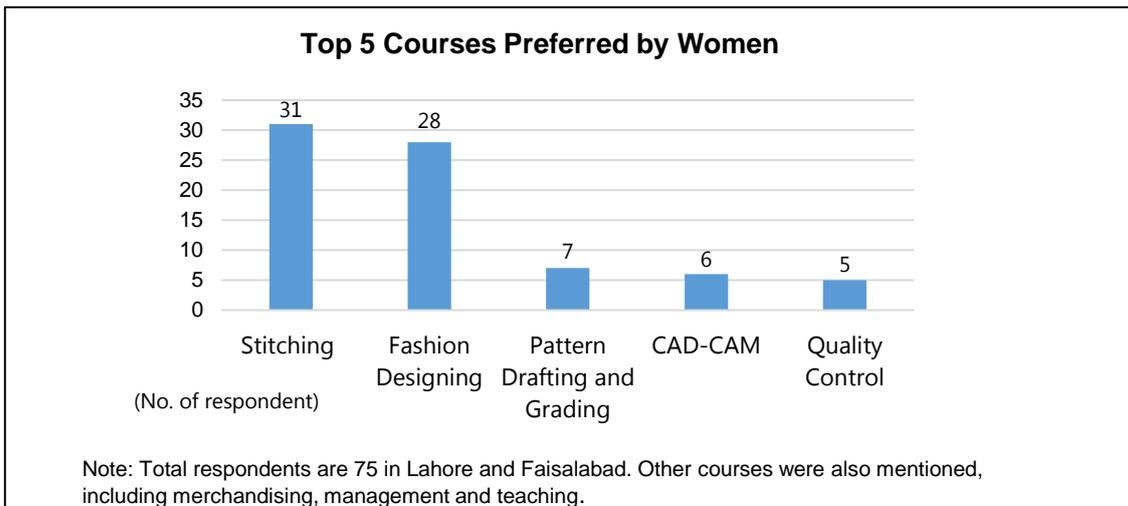


Figure 4. Top 5 Courses Preferred by Women

3-1-2-2 Challenges Faced by Women Wanting to Study

Figure 5 shows that transportation was the biggest challenge faced by women in Lahore and Faisalabad stopping them from benefiting from education and training. Distance was the second biggest challenge faced by the women. 85.3 % of the women faced the challenge of transportation while 76 % of the women faced distance. A number of women answered that they cannot afford the daily transportation costs. Several women answered that if transportation were provided by training institutes, this would encourage them to get training. Regarding the distance, the majority of women stated that it would be acceptable if it takes approximately 15 to 30 minutes' drive to commute for studying, which shows the women prefer to go to nearby training institutes from their homes.

Around half of the women faced challenges such as not being able to afford school fees, concerns about security and inappropriate study environments. 57.3 % of the women faced the challenge of school fees, 50.7 % of the women mentioned security issues, while 48 % of the women highlighted the study environment as being a challenge. A number of women answered that they face the challenge of security both inside and outside the training institute. Several women answered that they are concerned about long distances and are worried about using public transportation due to security issues. Some other women answered that they feel insecure if male students are in the same

classroom as they are used to studying in a separate environment from males. These results show that women are likely to face a variety of security issues. Regarding the study environment, some women answered that they prefer female trainers, while the others answered that they do not have any problem with male trainers if male trainers are competent enough and well trained.

Surprisingly, 13.3 % of the women faced the challenge of opposition from their families which is comparatively lower than the other challenges mentioned above. A few women answered that they face resistance from their parents against studying, especially in a co-education environment.

The survey highlights how women face challenges regarding transportation, school fees, the study environment, distance and security. The result implies that improving transportation and other challenges faced by women wanting to study is a crucial key to encourage women to obtain education and training.

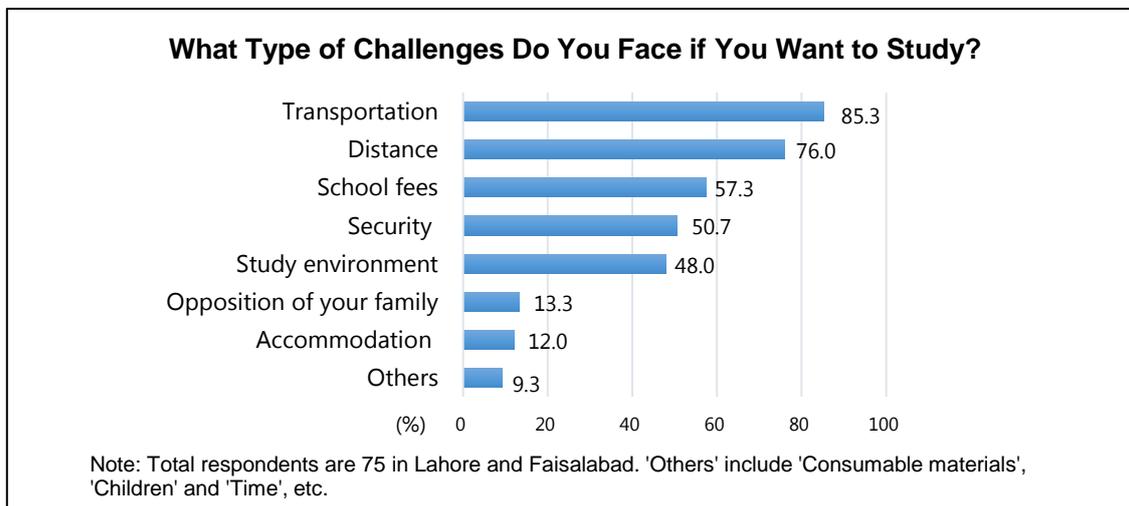


Figure 5. What Type of Challenges Do You Face if You Want to Study?

In the comparison between single and married women in Lahore and Faisalabad, the survey highlighted that single women are more likely to face opposition from their families, inadequate study environments and concerns about security in comparison to married women when they study. 19 % of single women faced the challenge of opposition from their families, while only 6.1 % of married women faced the same challenge (Figure 6). 54.8 % of single women, in comparison to 45.5 % of married women, faced the challenge of security. 54.8 % of single women, in comparison to 39.4 % of married women, faced challenges regarding their study environment. On the other hand, 9.5 % of single women faced challenges regarding their accommodation, while around 15.2 % of married women faced the same challenge. More married women than single answered that for financial reasons, they preferred to receive a contribution towards their housing and rent.

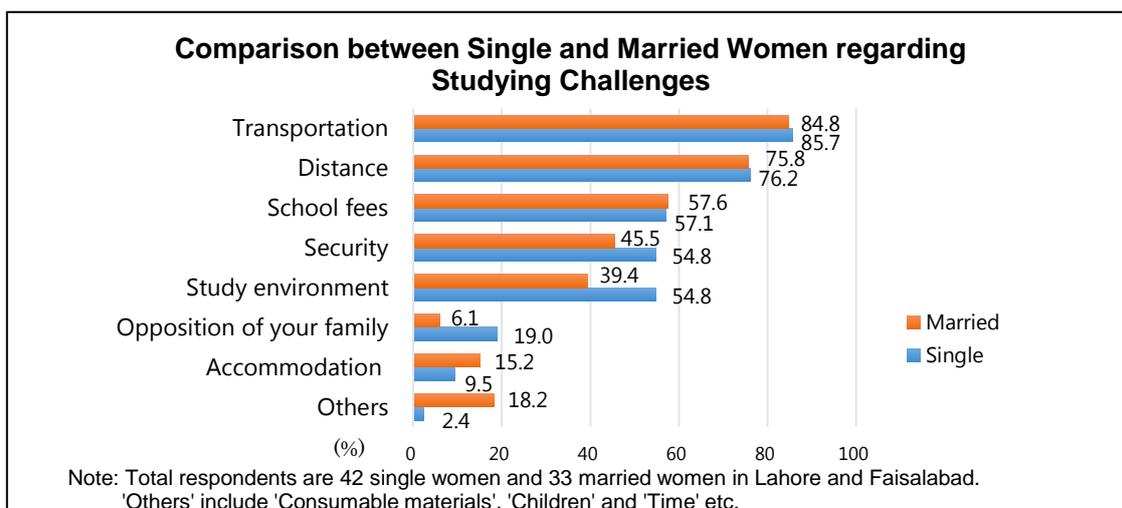


Figure 6. Comparison between Single and Married Women regarding Studying Challenges

In the comparison between the women in Lahore and Faisalabad, Figure 7 illustrates that women in Faisalabad are more likely to face the challenge of security, study environment, school fees, distance and transportation in comparison to the women in Lahore. 87 % of the women in Faisalabad whereas 34.6% of the women in Lahore faced the challenge of security, which shows a remarkable distinction between districts. 65 % of the women in Faisalabad, whereas 40.4 % of the women in Lahore, faced the challenge of their study environment. By contrast, 4.3 % of the women in Faisalabad and 15.4 % of the women in Lahore faced the challenge of accommodation. As for the opposition shown by their families, women in Lahore and Faisalabad showed a very similar response, at around 13 %.

A number of the women from Faisalabad are more likely than those from Lahore to answer that they feel insecure in accessing training because of security concerns. Several women in Faisalabad answered that they would like to benefit from training; however, they are worried about security issues when they go out. This may suggest that there are no training institutes near the surveyed communities and the women are likely to have less access to information about the opportunities. For example, the results of the survey in 3-2-2-4 show that the women in Faisalabad are more likely to have less information about the stipends of training institutes in comparison to the women in Lahore.

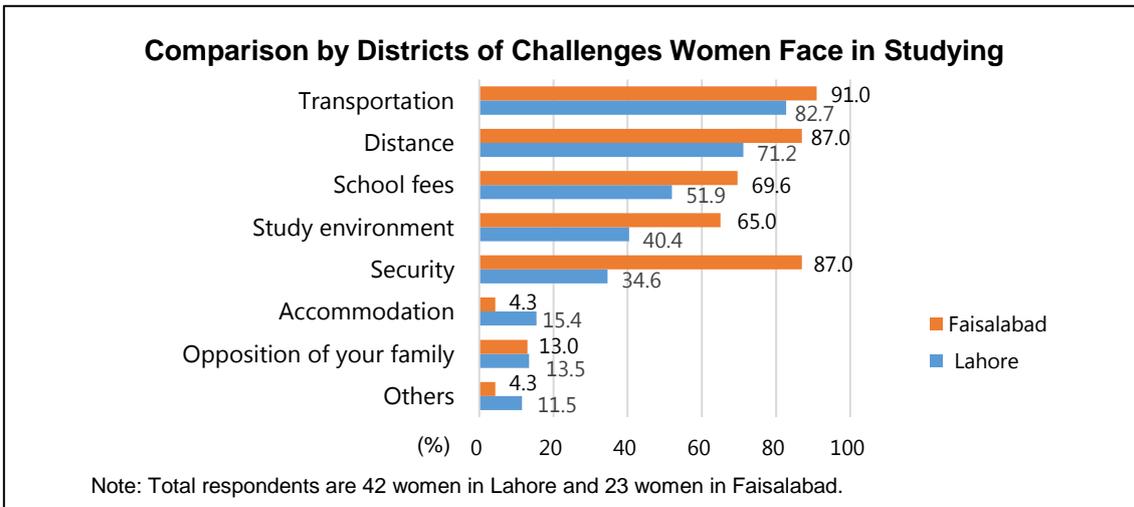


Figure 7. Comparison by Districts of Challenges of Women Face in Studying

3-1-2-3 Expectations of Women regarding Studying

Transportation was the most expected provision among the women when they study. Free training was second. 86.7 % of women expected transportation and 74.7 % of the women expected a free training from a training institute (Figure 8). Several women answered that they cannot afford the daily transportation costs and school fees, highlighting their economic needs. 60% of the women expected internship programmes and support with employment. 50.7 % of the women expected suitable study hours, 41.3 % of the women expected day nursery and 40 % of the women expected student loans. 34.7 % of the women expected to be taught by female teachers. Some of the women answered that they do not have any family members or relatives who can take care of their children and so need to access day nursery provision within the training institutes. A number of the women expected student loans to start their own business, as well as employment support in order to make good connections with the industry and to acquire a better job. Several women answered that they may feel more comfortable and relaxed if they receive training from female trainers, while a few replied that this is not issue.

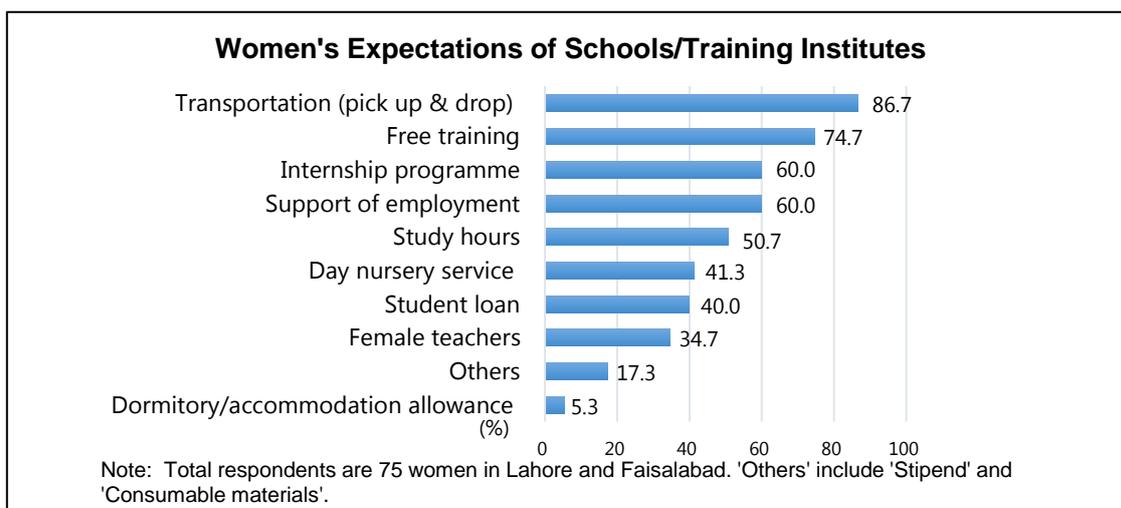


Figure 8. Women's Expectations of Schools/Training Institutes

In the comparison between single and married women in Lahore and Faisalabad, the survey highlighted that single women are more likely to expect more system support from training institutes, such as internships and counselling, while married women are more likely to expect facility and financial support.

In comparison to married women, single women were more likely to expect internships, support in finding employment, favorable study hours, student loans and female teachers from the training institutes (Figure 9). 73.8 % of single women expected internship programmes, while 42.4 % of married women expected the same, which shows a remarkable difference between the groups. Some single women expected an internship programme as they wish to develop connections within the industry for work. Several single women answered that if they received employment support from training institutes, this would be a considerable incentive to access training. A number of single women answered that they prefer to study for a short time, such as two to five hours, as they also need to continue with their housework and support their families.

Married women were more likely to expect transportation, free training, day nursery care and accommodation in comparison to single women. 81.8 % of married women in comparison to 69 % of single women expected free training. 51.5 % of married women expected day nursery service while 33.3 % of single women expected the same. Several married women stated that they expect transportation, school fee subsidies and accommodation allowance due to limited family budgets as they have to spend money on their family. In addition, some married women answered that they would like to use a day nursery service as they do not have any family members to take care of their children. The results shows that married women are more likely to expect facility and financial supports from training institutes.

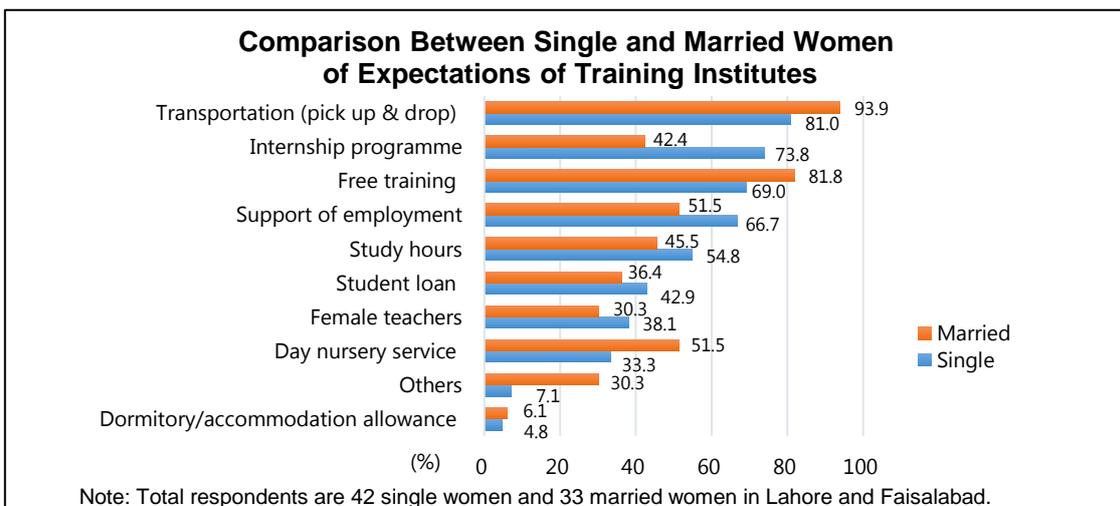


Figure 9. Comparison Between Single and Married Women of Expectations of Training Institutes

3-1-2-4 Women's Access to Information about Training Institutes

In the comparison between the women in Lahore and Faisalabad, 58 % of the women in Lahore had access to subsidy information about training institutes' school fees and transportation provision², while only 30 % of women in Faisalabad had such information (Figure 10, 11). During the survey, a large number of women in both districts answered that had they known about this information, they would have applied for admission to the training institutes, as well as expressing an interest in studying in the future. Thus, if accessibility to information grows amongst women, it is expected that the number of women who apply for the training institutes will increase.

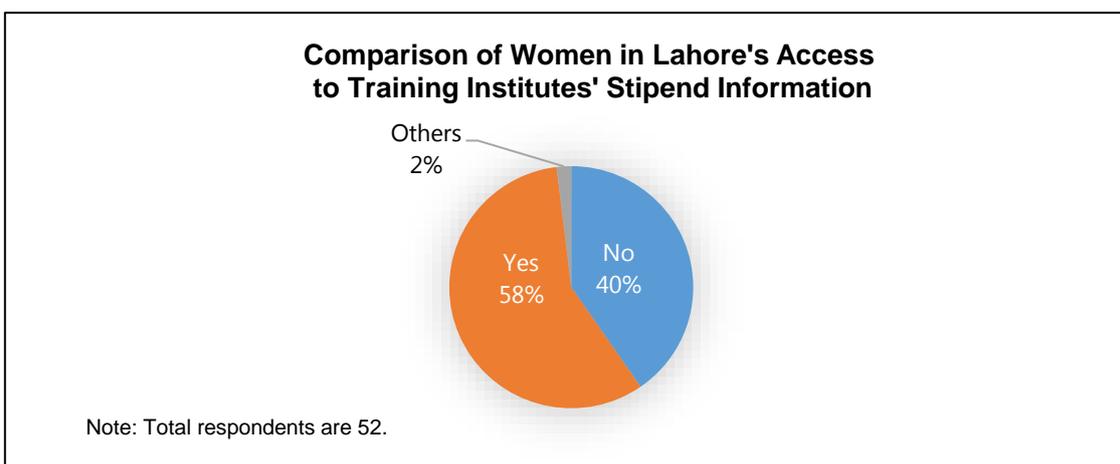


Figure 10. Comparison of Women in Lahore's Access to Training Institutes' Stipend Information

² Nacional Vocational & Technical Training Commission (NAVTTTC) is an apex body at national level to regulate, facilitate and provide policy direction in Vocational & Technical Training. Punjab Skills Development Fund (PSDF) is a provincial body to provide funds to private, public and not-for-profit sector training service providers that deliver quality training in various employable trades for the individuals. NAVTTTC and PSDF provide training expense and some stipend to trainees to cover their transportation cost. The training cost covers all expenses of training including administrative cost, training material cost, utilities, teachers, overheads etc. in short, trainees of their funded programs are not required to pay anything to training institutes.

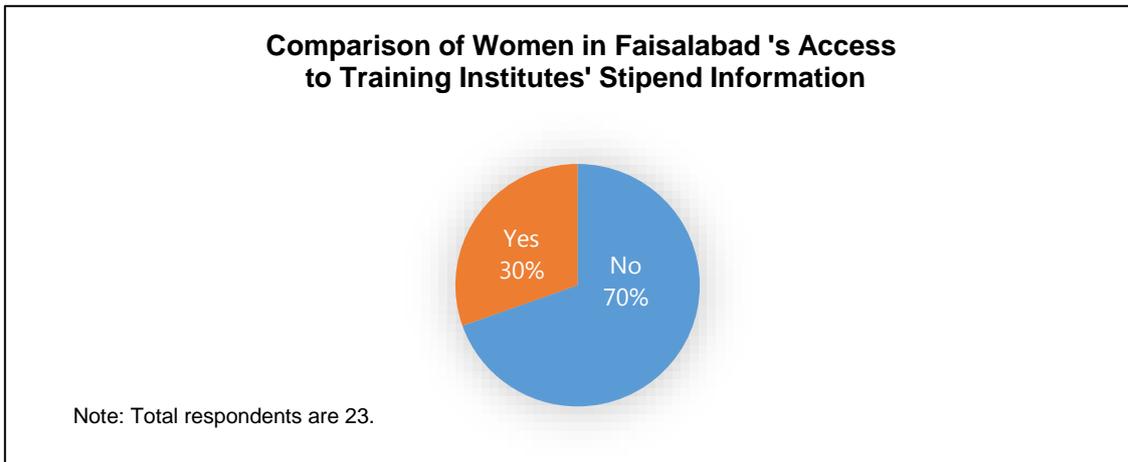


Figure 11. Comparison of Women in Faisalabad's Access to Training Institutes' Stipend Information

Figure 12 shows that 74.7 % of women obtained information about school/training institutes through their personal connections, which is the highest channel. 34.7 % of the women used newspapers and around 22.7 % of the women used television to acquire information. Women were most likely to obtain the information through personal connections such as friends, family, relatives and neighbours. Some women answered that they also acquire information through their communities, especially from female community leaders.

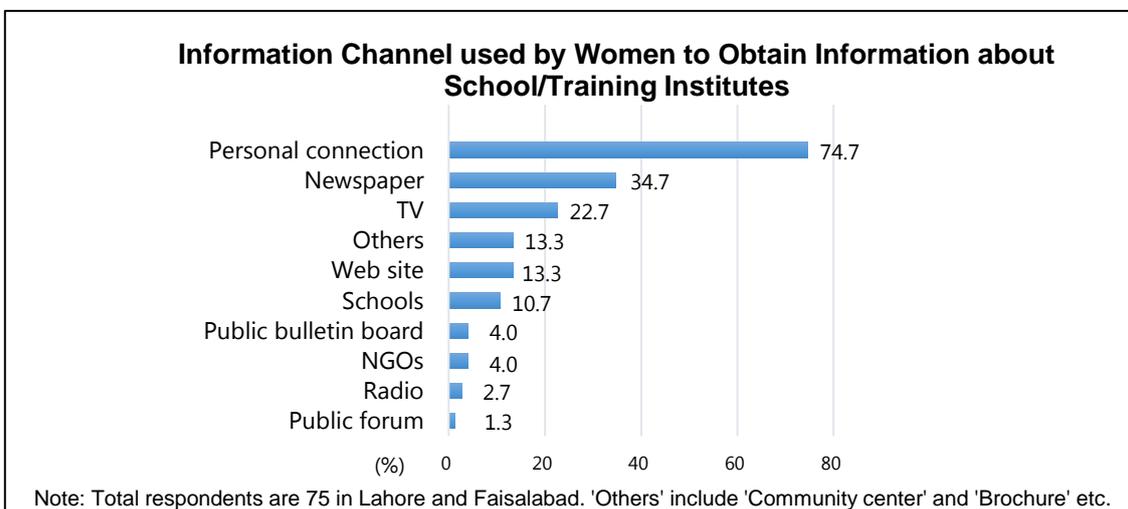


Figure 12. Information Channel used by Women to Obtain Information about School/Training Institutes

3-1-3 Situation of Women in Work

3-1-3-1 Motivation for Work

Figure 13 shows that 98 % of surveyed women in Lahore and Faisalabad have a desire to bring

about change in their socioeconomic status. The majority of the women answered from an economic perspective, that they would like to support their families. A small number of women answered that they would like to be independent and have their own career, and some others answered that they would like to empower their communities.

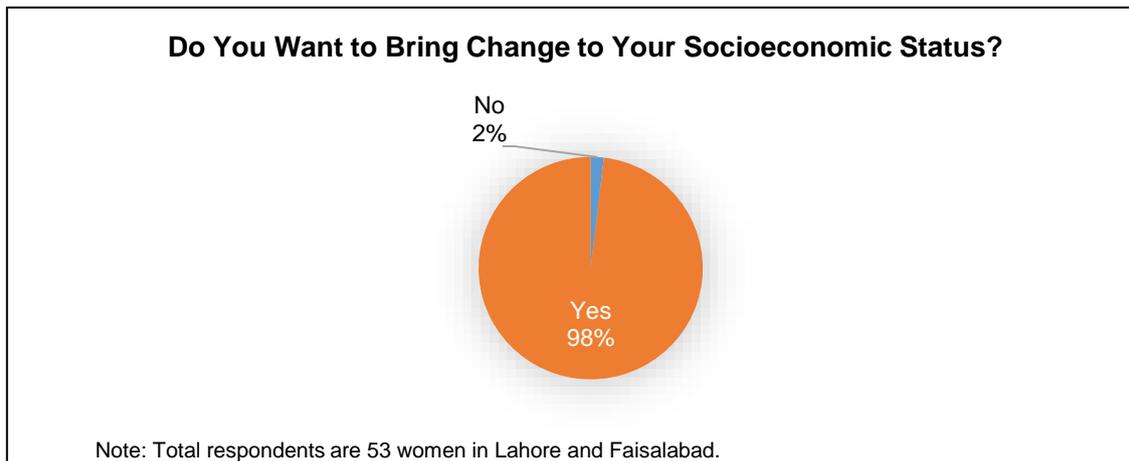


Figure 13. Do You Want to Bring Change to Your Socioeconomic Status?

Figure 14 illustrates that 93 % of the women in the districts showed interest in working. A number of the women showed their interest in working in the apparel/ textile industry, being self-employed and engaging in home-based work. Several women answered that they hold a view that the industry offers good opportunities to help them support their families and develop their independence.

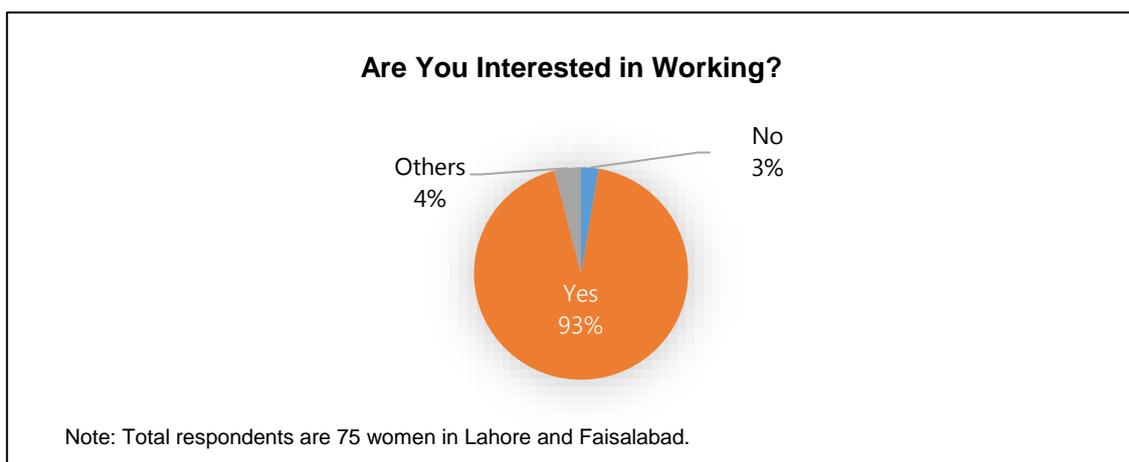


Figure 14. Are You Interested in Working?

76 % of surveyed women in Lahore and Faisalabad showed their interest in working in an

apparel/textile company (Figure 15). The majority of women answered that they prefer to work in fashion designing and stitching. A small number of the women would like to work in boutique and management work. 20% of the women showed no interest in working in a company as they would like to work from home and be self-employed. A number of the women answered that they would like to work at home or be self-employed and some of them expressed that they need to stay at home because of their small children. The result suggests that not only company employment, but also home-based work and self-employment for females, could be enhanced to respond to their needs and increase female participation in the industry. In addition to this, it should be noted that female home-based workers are a significant part of the textile industry workforce, contributing much to the economy. According to the UN WOMEN, home-based workers contribute approximately PKP 400 billion to the economy and 65 % of the home-based workers are women in Pakistan³. The contribution of both female and male home-based workers generates 3.8 % of GDP⁴, which represents a significant contribution to the economy and highlights how the female contribution is crucial to the informal sector.

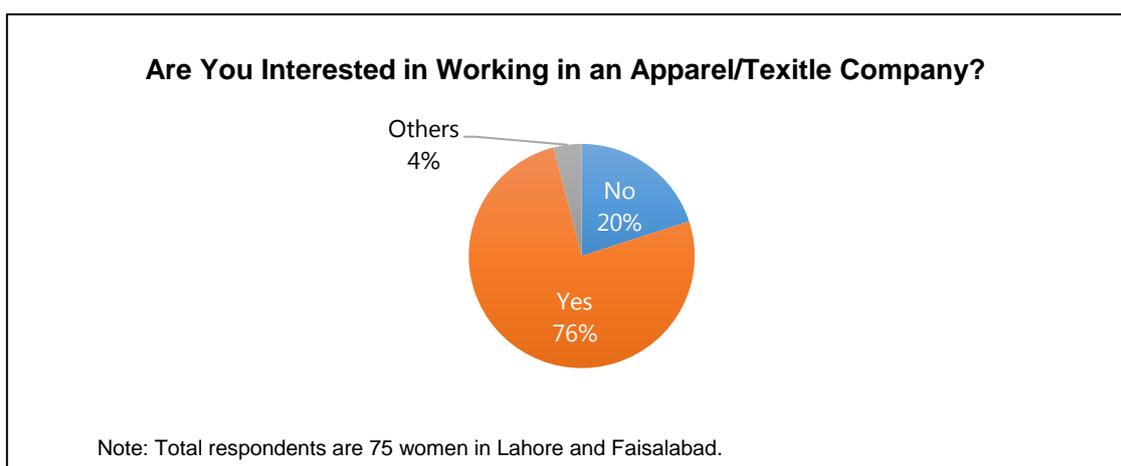


Figure 15. Are You Interested in Working in an Apparel/Textile Company?

3-1-3-2 Challenges for Women in Work

Table 16 shows that transportation was the most common challenge facing women in Lahore and Faisalabad when they work. After that, long distances and working hours were major challenges for women. 61.3 % of women faced the challenge of transportation, 56 % of women faced the challenge of distance, and 54.7 % of women faced working hours as a challenge. A number of women answered that they cannot afford daily transportation costs, again highlighting economic needs. Some women answered that they are unable to work overtime due to caring for their children. 8 % of

³ Women's Economic Participation and Empowerment in Pakistan Status Report 2016, UN WOMEN.

⁴ *ibid.*

women faced opposition from their families, significantly lower than other challenges.

As a consequence, the result suggests that reducing these challenges by providing basic facilities to accommodate women may result in encouraging more women to participate in the industry.

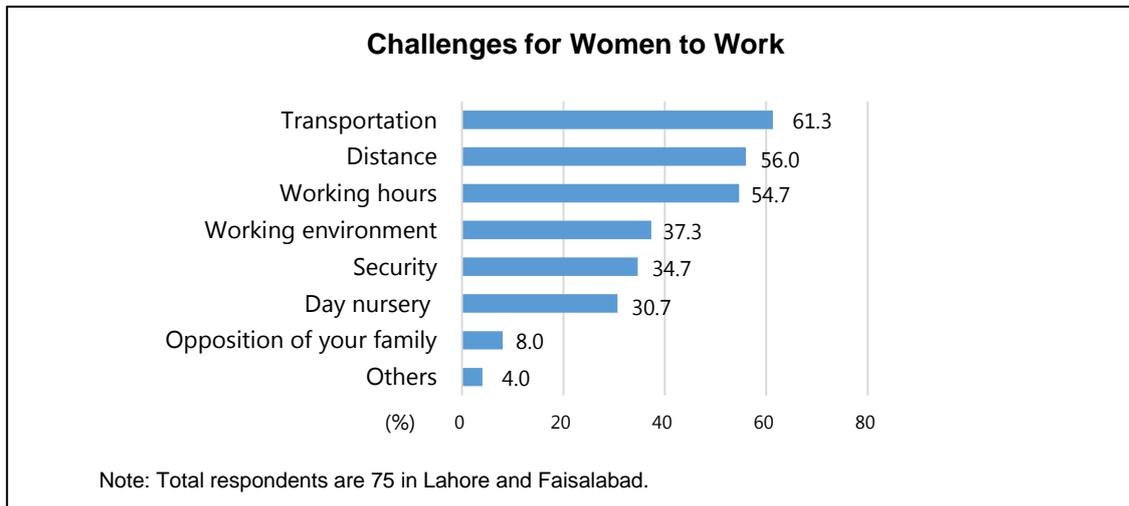


Figure 16. Challenges for Women to Work

Single women were more likely to face challenges of security, opposition from their families as well as transportation issues when they work, in comparison to married women. On the other hand, married women were more likely to face challenges relating to day nursery care, inadequate working environments, working hours and distance in comparison to single women. 40.5 % of single women faced the challenge of security, in comparison to 27.3 % of married women (Figure 17). 39.4 % of married women faced the challenge of needing to access day nursery provision for their children, while 23.8 % of single women raised this as an issue. Some women explained that they need this provision as they do not have any family or relatives to ask to take care of their children. 11.9 % of single women faced the challenge of opposition from their families, while only 3 % of married women faced this challenge. These results suggest that it is crucial to respond to the different needs of married and single women, as they face different circumstances and challenges.

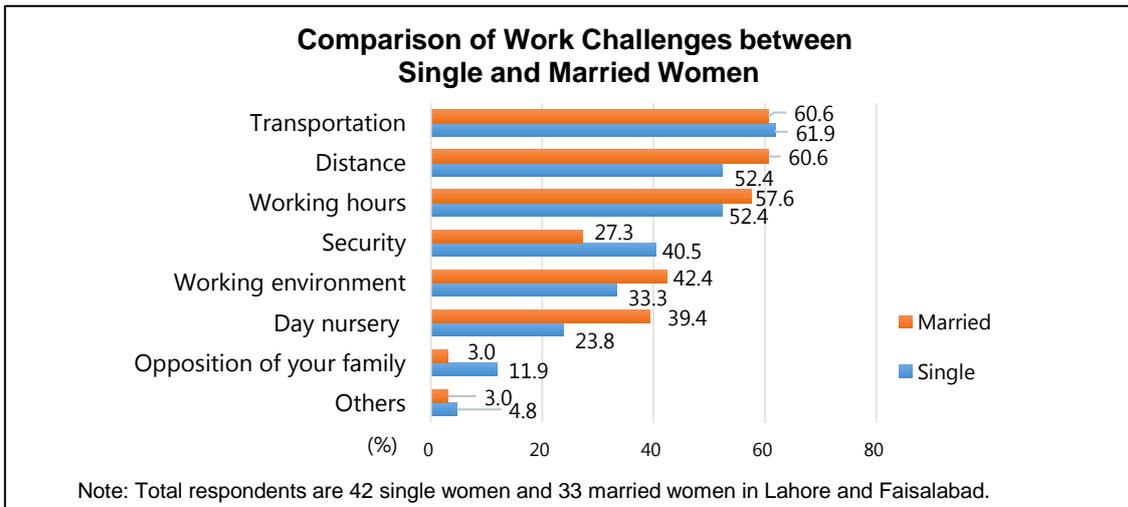


Figure 17. Comparison of Work Challenges between Single and Married Women

3-1-3-3 Expectations of Women at Work

Figure 18 demonstrates that separate female toilets are most expected at the work place by the women in Lahore and Faisalabad, 76 % of the total women. 72 % of women expected a prayer room for females, 62.7 % of the women expected transportation and 61.3 % of women expected a separate working space from men. Around 40 % to 48 % of the women expected insurance, flexible working hours, training courses and a female counselor. 29.3 % of the women expected day nursery provision at the company. The majority of the women answered that it should be compulsory to have separate toilets from males in order to maintain their dignity. A number of the women expressed that they need to be able to pray properly in peace. A number of the women also expressed that they feel comfortable having a separate working place from males.

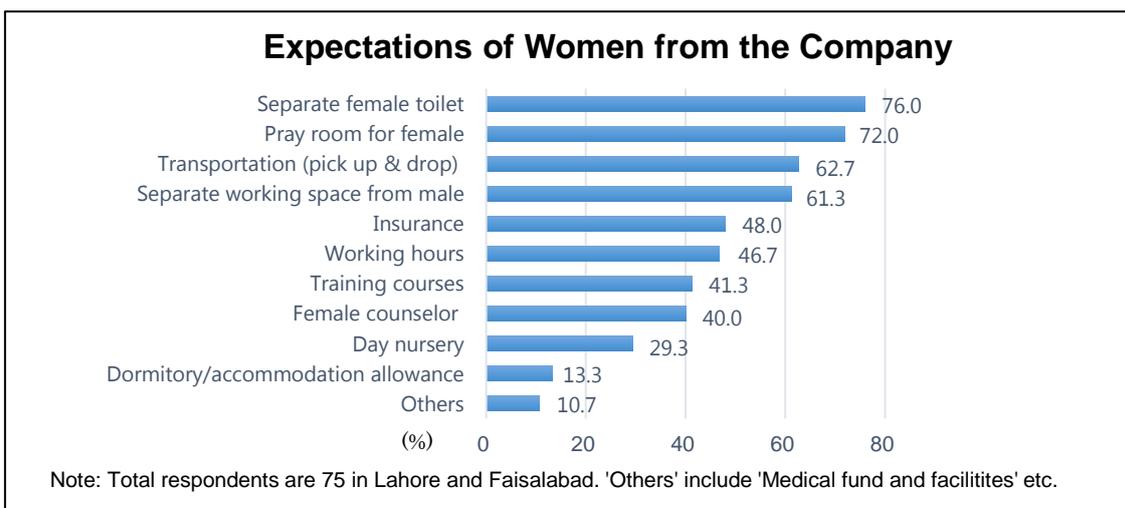


Figure 18. Expectations of Women from the Company

3-1-3-4 Women's Access to Information about the Company

Figure 19 illustrates that 56.6 % of the women in Lahore and Faisalabad know that there are transport subsidies offered by apparel and textile factories. 34 % of the women knew about training courses offered by the company and 18.9 % knew about day nursery provision. If women had more access to transport information, as well as other incentives from the company, this may result in motivating women to participate in the industry, as issues to do with transport and finding childcare are the highest challenges facing married women when they work.

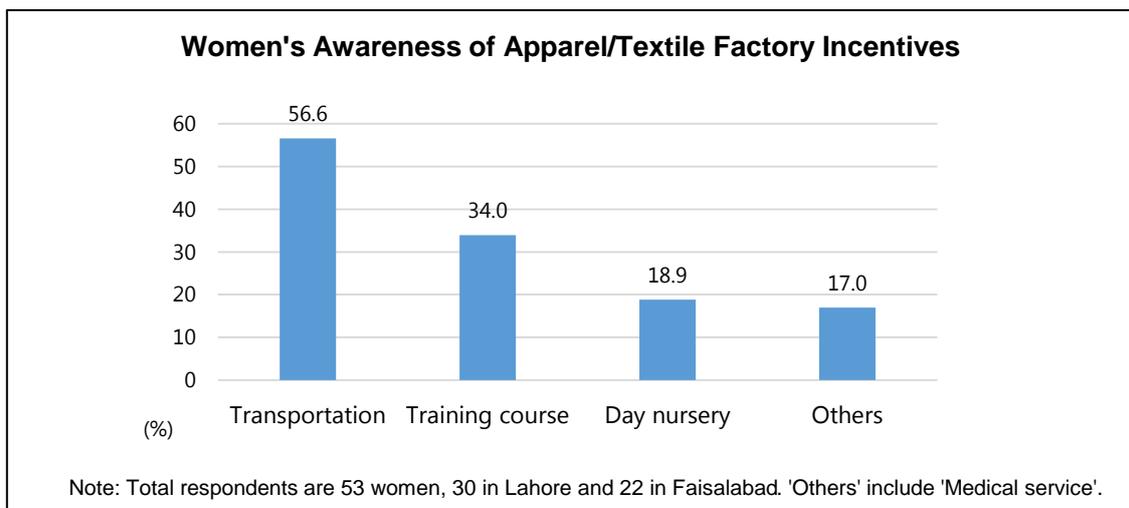


Figure 19. Women's Awareness of Apparel/Textile Factory Incentives

Personal connection was the most used means to obtain job recruitment information by the women in Lahore and Faisalabad. Figure 20 illustrates that 69.3 % of women used personal connections to acquire job information. 28 % of women used newspapers, around 20 % obtained information from schools, and 14.7 % of women used websites to obtain information.

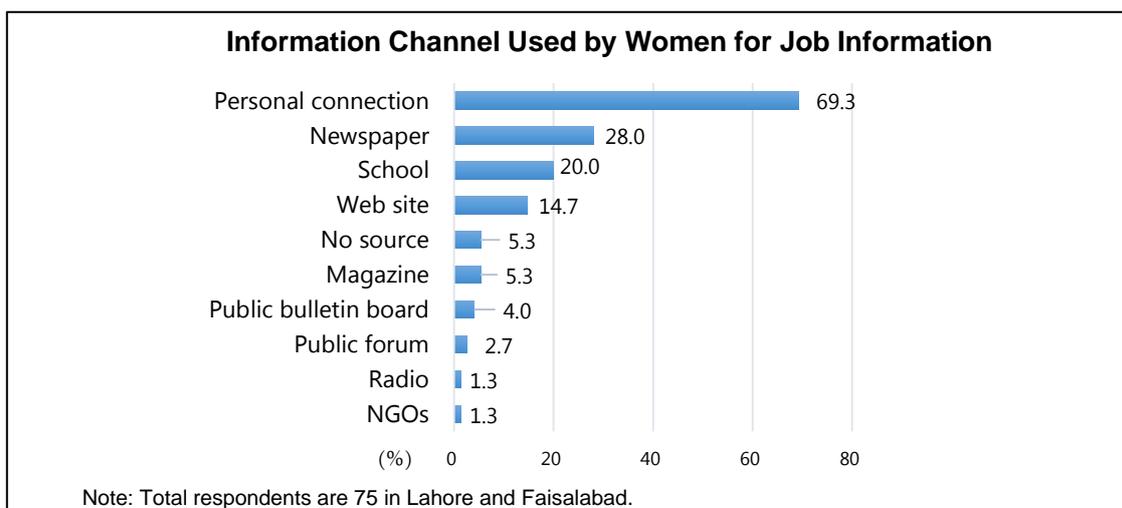


Figure 20. Information Channel Used by Women for Job Information

3-1-3-5 Reasons for Studying and Working

Table 3 shows the most common answers from women in Lahore and Faisalabad regarding their purpose for studying and working. The results demonstrate that the women have various reasons to study and work. The most common answer from the women regarding their reasons for studying was for personal growth. A number of the women answered that studying can help to make a better person. The women were likely to perceive that education is related to human growth. The second main answer was to obtain a better job, which is associated with work. The third most common answer was to become a better citizen and bring benefit to their communities. Apart from the three common answers, a few women answered that they would like to gain more self-confidence through education.

On the other hand, the most frequent answer from the women regarding the meaning of work was to support their families, which shows financial desires. A number of women answered that they would like to assist their husband, children and parents. A woman replied that she would like to be dutiful to her parents through work. A few divorced women expressed that they need a job to sustain themselves and their children. The second most common answer was to improve their quality of life, and the third answer was to be active in society. Several women answered that they would like to be busy and active in society. The fourth most frequent answer was to be independent and confident through work. Some women answered that they would like to stand on their own feet and have confidence in themselves through work.

Table 3. Most Frequent Answers from 75 Women in Lahore and Faisalabad regarding their reason for Studying and Working

Meaning of study (No. of respondents)	Meaning of work (No. of respondents)
<ul style="list-style-type: none"> ● For personal growth (30) ● To obtain a better job (7) ● To become a better citizen and bring benefit to the community (6) 	<ul style="list-style-type: none"> ● To support family (25) ● To have better living (11) ● To be active in the society (10) ● To be independent and confident (9)

Note: Total respondents are 52 women in Lahore and 21 women in Faisalabad. Multiple answers allowed.

3-2 Survey of 67 Companies in Lahore and Faisalabad

3-2-1 Status of Female Employees

3-2-1-1 The Proportion of Female and Male Employees

It is observed that the number of female employees in the surveyed companies in Lahore and Faisalabad was much less than the number of male employees. In Lahore, only 15 % of the workforce were female, while in Faisalabad it was 22 %. (Figure 21, 22)

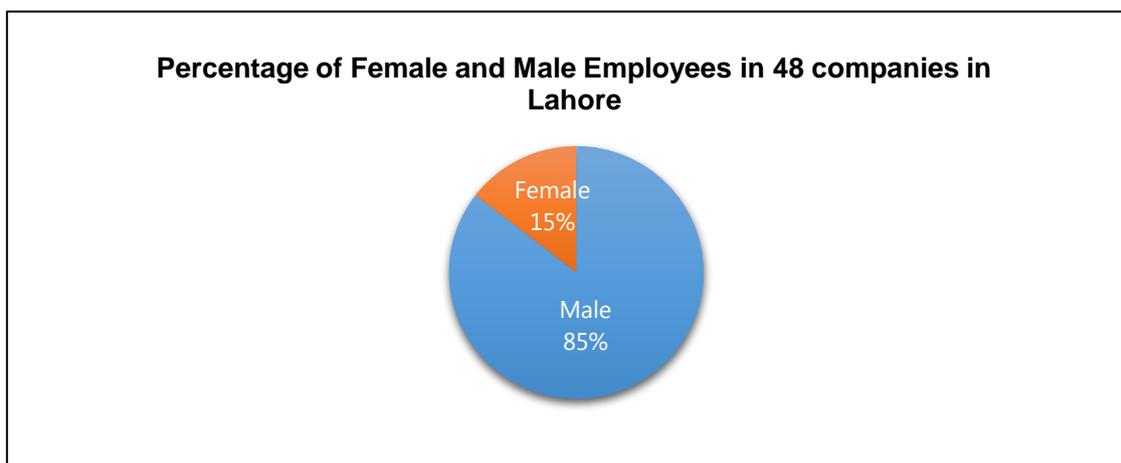


Figure 21. Percentage of Female and Male Employees in 48 companies in Lahore

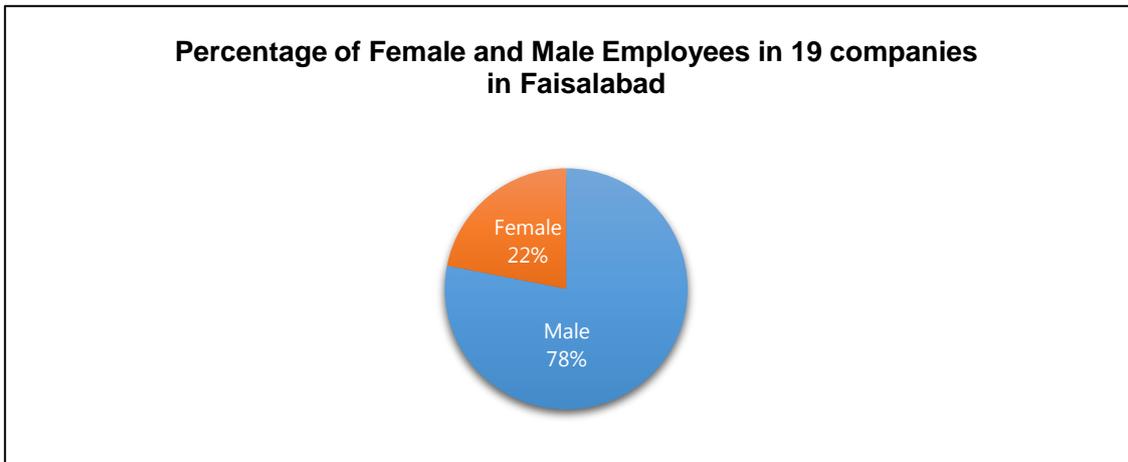


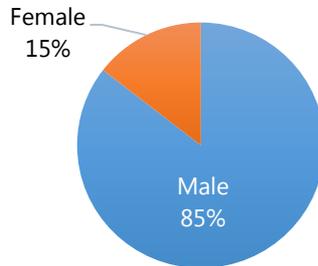
Figure 22. Percentage of Female and Male Employees in 19 companies in Faisalabad

Figure 23 demonstrates the percentage of female employees in large sized companies, and Figure 24 shows the percentage in small and medium sized companies in Lahore. The percentage of female employees in the large companies in Lahore was 15 %, while it was 14 % for the small and medium sized companies, illustrating a similar proportion.

By contrast, the proportion of female employees in large companies in Faisalabad was 22 %, while it was 10 % for medium companies (Figure 25, 26). It illustrates that the ratio of female employees in large companies in Faisalabad is approximately twice the size of medium companies in the same district. This may be attributed to the presence of a large company in Faisalabad which promotes female employment and has a larger number of female employees. During the survey, it was observed that several companies showed their willingness to hire females in the future, even though their current ratio of female employees is low. A number of medium sized companies in Faisalabad stated that they would like to hire more females in the future. Some of the companies expressed that providing a suitable environment where females feel comfortable is not yet available and they would like to improve the environment to be able to recruit more females in the future. One of the companies stated that they recently hired a female HR manager in order to help with the recruitment of more females.

The percentage of female employees in large companies in Faisalabad is larger than the ones in Lahore, while the percentage of female employees in small and medium companies in Lahore is greater than in medium companies in Faisalabad.

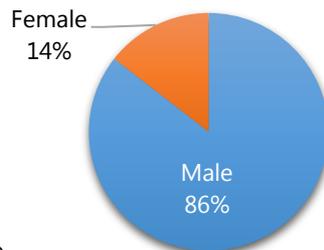
Percentage of Female and Male Employees in Large Sized Companies in Lahore



Note: Total respondents are 28.

Figure 23. Percentage of Female and Male Employees in Large Sized Companies in Lahore

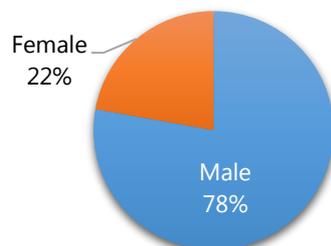
Percentage of Female and Male Employees in Small and Medium Sized Companies in Lahore



Note: Total respondents are 20.

Figure 24. Percentage of Female and Male Employees in Small and Medium Sized Companies in Lahore

Percentage of Female and Male Employees in Large Sized Companies in Faisalabad



Note: Total respondents are 10.

Figure 25. Percentage of Female and Male Employees in Large Sized Companies in Faisalabad

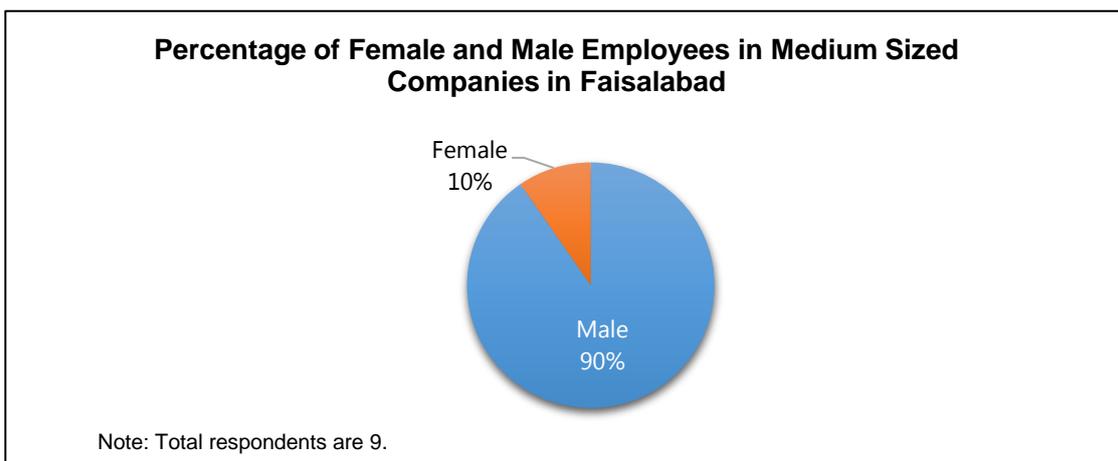


Figure 26. Percentage of Female and Male Employees in Medium Sized Companies in Faisalabad

Table 4 illustrates the number of female employees in the top five companies which employ the most females in Lahore and Faisalabad. Three companies had more female employees than males. Two of those three companies in Lahore employed 89 % and 82 % women, respectively, which is a very high proportion. 57 % of the workforce from the other company in Faisalabad were female.

A case study of the two companies which had a higher ratio of female employment than male from each districts of Lahore and Faisalabad will be described in 3-2-5.

Table 4. Percentage of Female Employees in Surveyed Companies in Lahore and Faisalabad in Comparison with Male Employees (Top 5)

Company	District	Size of company	No. of female employees	No. of male employees	% of female employees
Company A	Lahore	Large	780	100	89 %
Company B		Large	993	218	82 %
Company C		Large	1600	2400	40 %
Company D		Medium	150	250	37 %
Company E		Medium	30	50	37 %
Company A	Faisalabad	Large	200	150	57 %
Company B		Medium	25	40	38 %
Company C		Large	6500	13500	32 %
Company D		Large	1642	6568	20 %
Company E		Medium	20	80	20 %

Note: Total respondents are 48 companies in Lahore and 19 companies in Faisalabad.

3-2-1-2 The Proportion of Female and Male Managers

Figures 27 and 28 show the ratio of female managers in large companies in Lahore and medium companies. The percentage of large companies in Lahore was 8 %, while 9 % for small and medium companies, which shows just a small difference in the employment of female managers in Lahore.

Figures 29 and 30 show that the percentage of female managers in large companies in Faisalabad was 12 %, while only 2 % for medium companies, which shows that the proportion of large companies promoting women to management positions is six times higher than medium companies in Faisalabad.

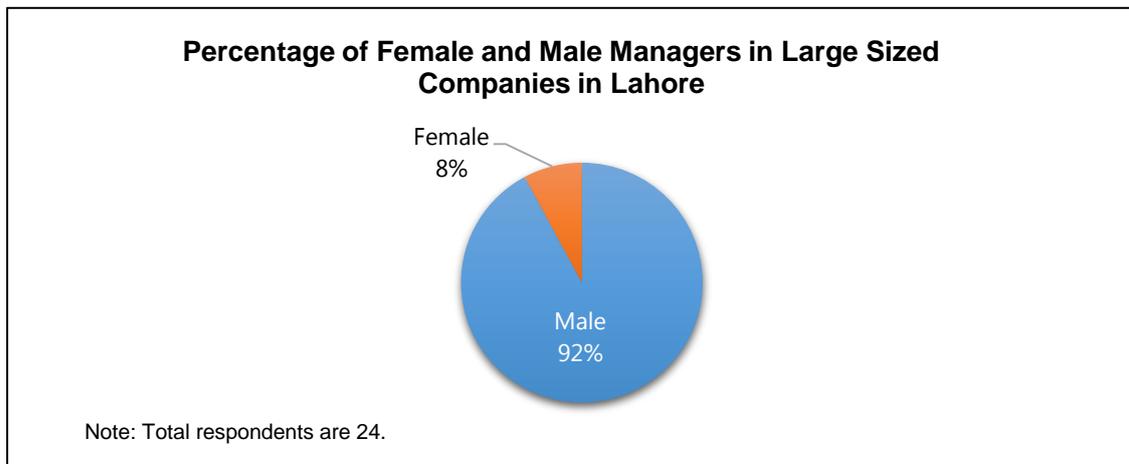


Figure 27. Percentage of Female and Male Managers in Large Sized Companies in Lahore

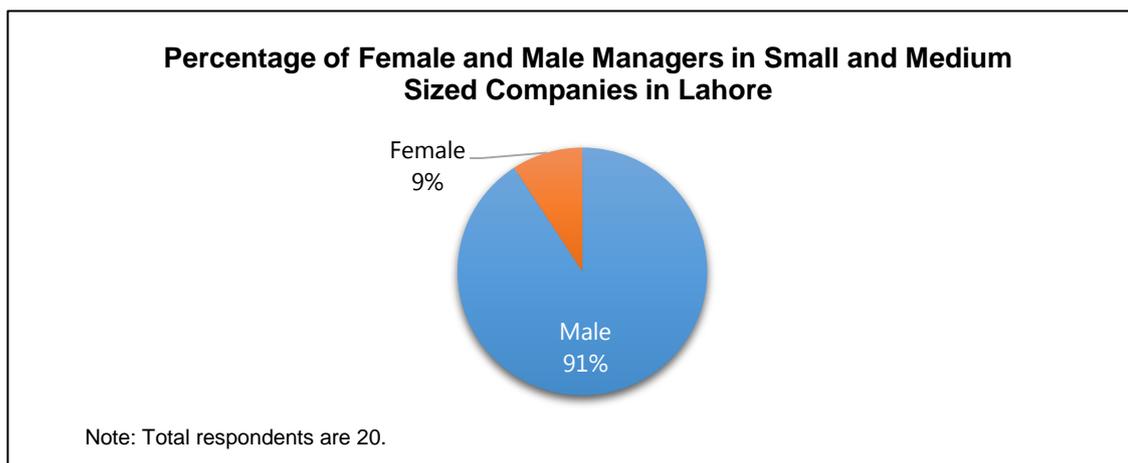


Figure 28. Percentage of Female and Male Managers in Small and Medium Sized Companies in Lahore

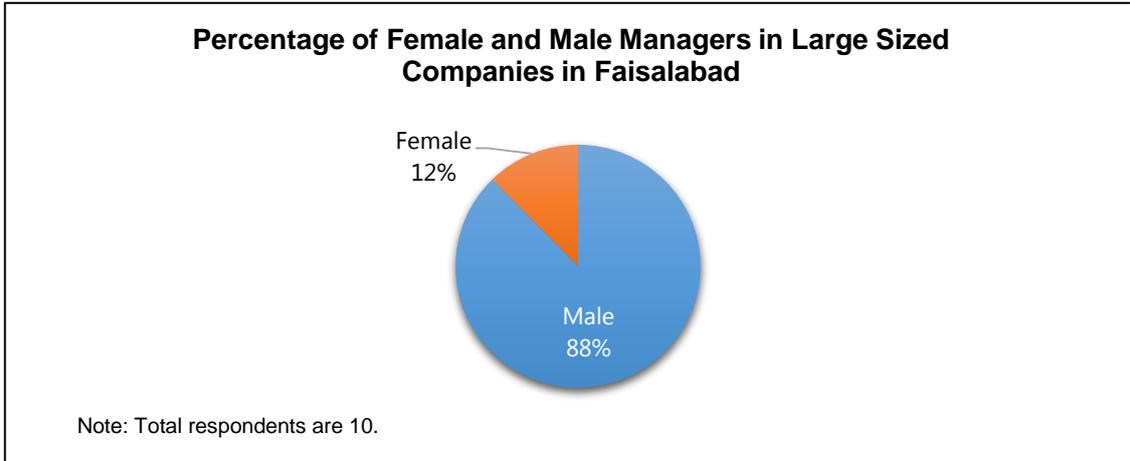


Figure 29. Percentage of Female and Male Managers in Large Sized Companies in Faisalabad

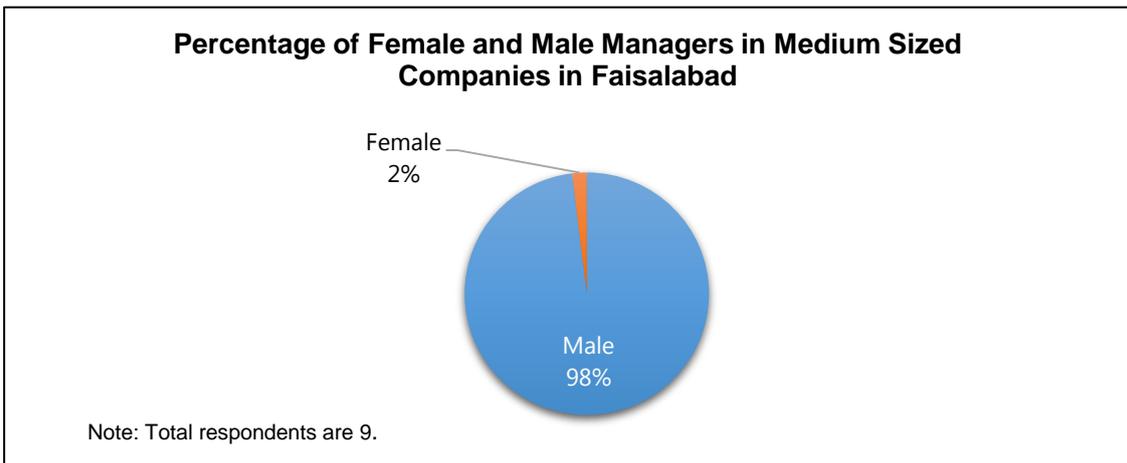


Figure 30. Percentage of Female and Male Managers in Medium Sized Companies in Faisalabad

Table 5 shows the percentage of female managers from the top 5 companies in Lahore and Faisalabad in comparison to the number of male managers. The company with the highest proportion of female managers was Company A in Lahore with 46 %, while it was 33 % for the Company A in Faisalabad. There were three companies (B, C and D) in Lahore which had a range of female managers between 30 % and 40 %, while only one company (B) in Faisalabad had the same range. As shown above in Figure 3-27, 3-29, the number of female managers within large companies in Faisalabad was higher than the ones in Lahore. By contrast, in the comparison of the top 5 companies between the two districts, the number of female managers of companies in Lahore was higher than in Faisalabad. This demonstrates that the number of companies in Lahore which promote female managers are likely to be more than the number of the companies in Faisalabad.

Table 5. Percentage of Female Managers in Surveyed Companies in Lahore and Faisalabad in Comparison with Male Managers (Top 5)

Company	District	Size of company	No. of female managers	No of male managers	% of female managers
Company A	Lahore	Large	6	7	46 %
Company B		Large	17	30	36 %
Company C		Large	3	6	33 %
Company D		Large	11	25	31 %
Company E		Medium	2	6	25 %
Company A	Faisalabad	Large	5	10	33 %
Company B		Large	5	18	22 %
Company C		Large	3	11	21 %
Company D		Large	2	10	17 %
Company E		Large	50	300	14 %

Note: Total respondents are 48 companies in Lahore and 19 companies in Faisalabad.

3-2-2 Company Needs and Constraints regarding Women Employment

3-2-2-1 Company View of Female Workers' Strengths

Figures 31 and 32 show the views toward female employees' strengths in the apparel/ textile industry. Female employees were principally viewed by companies in both districts on the basis of their attitudes such as focus and punctuality. It was observed that companies in Faisalabad were more likely to regard women's skills such as stitching as their strengths, while companies in Lahore were more likely to view their attitudes. 18 out of 48 companies in Lahore regarded being focused as the best strength, followed by 13 companies appreciating punctuality. Likewise, females were viewed by 9 companies out of 19 in Faisalabad on the basis of their attitudes such as being focused and punctual. 7 out of 19 companies in Faisalabad viewed women's skills such as stitching as their strengths, while 3 companies out of 48 in Lahore viewed this.

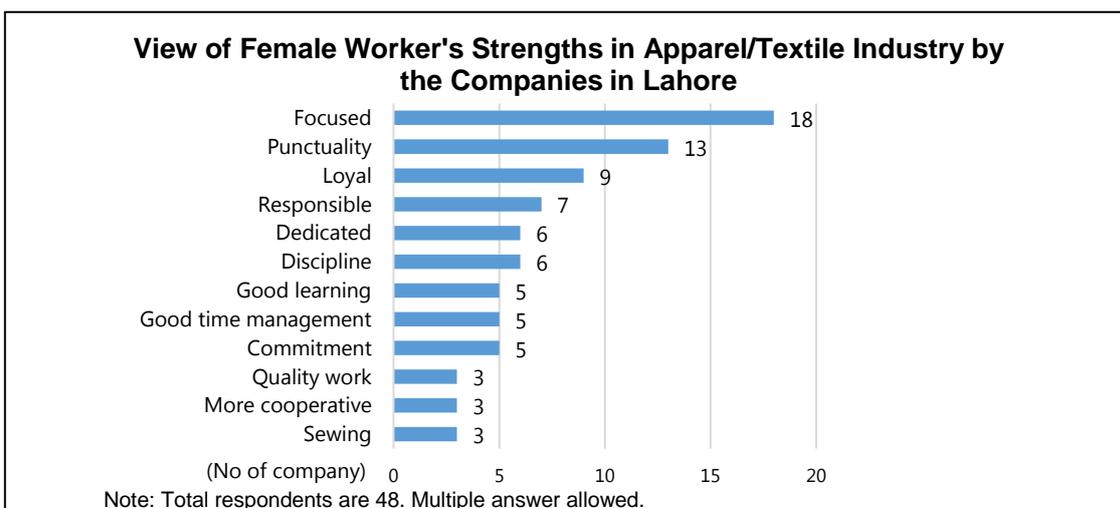


Figure 31. View of Female Worker's Strengths in Apparel/Textile Industry by the Companies in Lahore

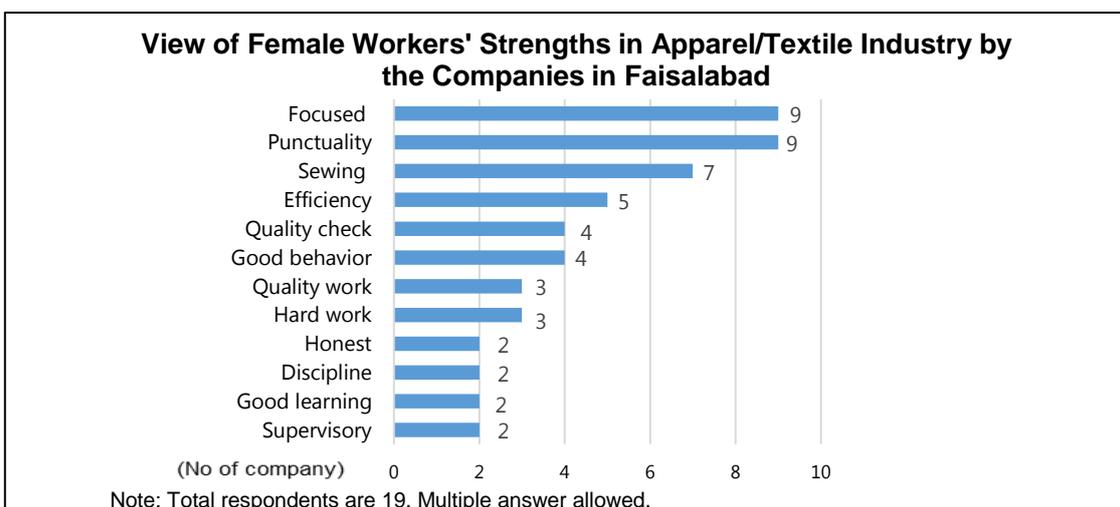


Figure 32. View of Female Workers' Strengths in Apparel/Textile Industry by the Companies in Faisalabad

3-2-2-2 Top In-Demand Section and Company Plan for Female Employment

Figures 33 and 34 show that 'finishing, packing and clipping' were the most demanded sections by the companies in Lahore for female workers, and 'stitching' for the companies in Faisalabad.

The top three departments demanded by companies in both districts for female workers were 'finishing, packing and clipping', 'stitching' and 'quality inspection'. 34 % of the companies needed female workers in finishing, packing and clipping sections in Lahore and 31 % for stitching sections and 17 % for quality inspection. 40 % of the companies in Faisalabad needed female workers in stitching, 26 % for finishing, packing and clipping and 18 % for quality inspection. A number of companies in Lahore answered that they need females in these departments as these positions are less physically intensive and require attitudes such as concentration and commitment, and skills in

stitching and finishing. In Faisalabad, several companies highlighted that females show a high standard of work in the areas of stitching, quality and finishing. Some companies answered that they prefer females due to their attitudes, such as being disciplined, punctual and focused. It is observed that the companies in Faisalabad were more likely to recognize the skills women have to offer than the companies in Lahore. The result in 3-2-2-1 demonstrates that the companies in Faisalabad were more likely to view females’ skills such as stitching as their strengths, while companies in Lahore were more likely to view their attitudes.

Thus, it seems that the companies in Lahore are more likely to demand unskilled females in the section of ‘finishing, packing and clipping’ which does not require special skills while the companies in Faisalabad prefer skilled females in the section of ‘stitching’, and ‘quality inspection’ which require training; however, this comparative analysis will require further research.

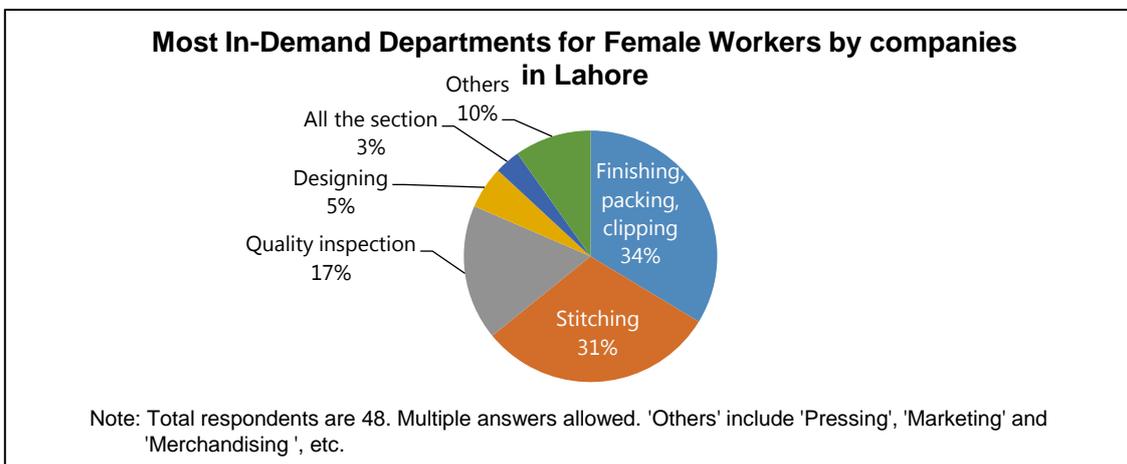


Figure 33. Most In-Demand Departments for Female Workers by Companies in Lahore

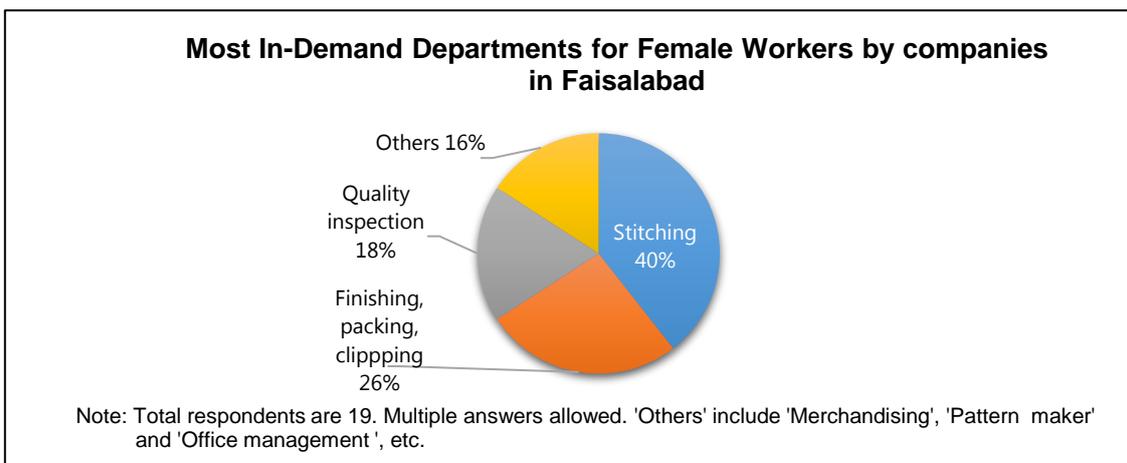


Figure 34. Most In-Demand Departments for Female Workers by Companies in Faisalabad

Figures 35 and 36 illustrate companies' future plans regarding female recruitment. 63 % of the companies in Lahore answered that they have a plan to hire more females, while 90 % of the companies in Faisalabad had a plan. This shows that the companies in Faisalabad are more likely to have plans regarding female employment than the ones in Lahore. 10 % of the companies in Lahore had a plan to hire more females when they have needs, while 5 % of the companies in Faisalabad had a plan. 2 % of the companies in Lahore answered that they do not have a plan to hire females due to their policy while 5 % of the companies in Faisalabad had the same reason.

It is observed that the number of the companies in Faisalabad which show specific plans is larger than the companies in Lahore. A few companies in Lahore showed plans to increase the number of females to between 20 % and 50 %. One of the companies in the same district stated that they would like to maintain the same ratio of current female ratio which is around 80 %. One of the companies in Lahore stated that they have a plan to establish a female unit hiring female managers in stitching. A number of the companies in Faisalabad also showed their plans to increase females with the range of 20 % to 50 % by showing the deadlines, which demonstrates their specific plans. Several companies in the same district showed their plan to establish separate stitching and packing units for females.

As shown above in Figure 26, the ratio of female employees in medium companies in Faisalabad was only 10 %, which shows a very small portion of female employees; however, a number of the companies stated that they have specific plans to hire female employees.

Several companies in both districts stated that they face a shortage of skilled and unskilled females in comparison to males, although they would like to hire females.

As for the companies which answered that they do not have a plan to hire females, some expressed that they feel reluctant to hire women because they are worried about negative repercussions, such as men's inappropriate behavior towards their female colleagues. Another company answered that the environment where females can work is not ready in terms of facilities such as separate units and transportation, and their male employees may be not ready to accept females.

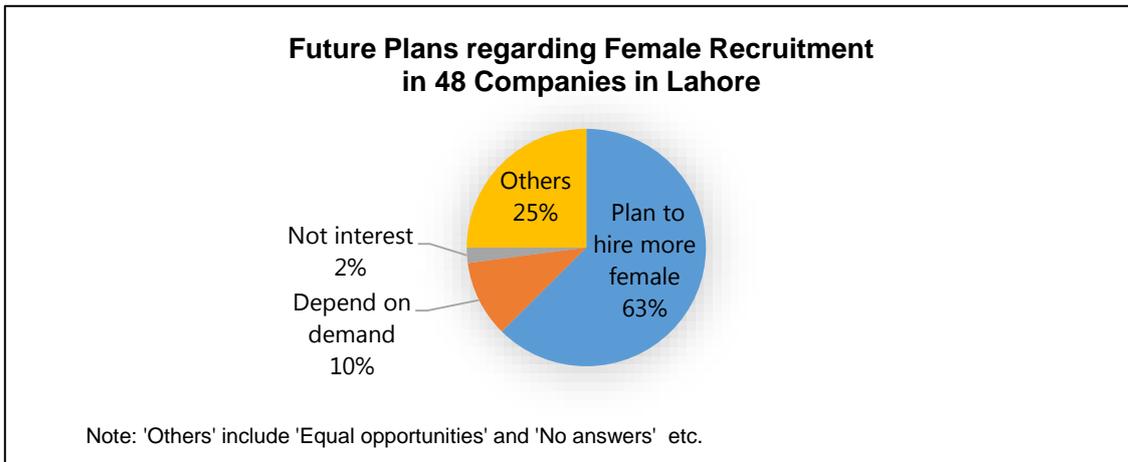


Figure 35. Future Plans regarding Female Recruitment in 48 Companies in Lahore

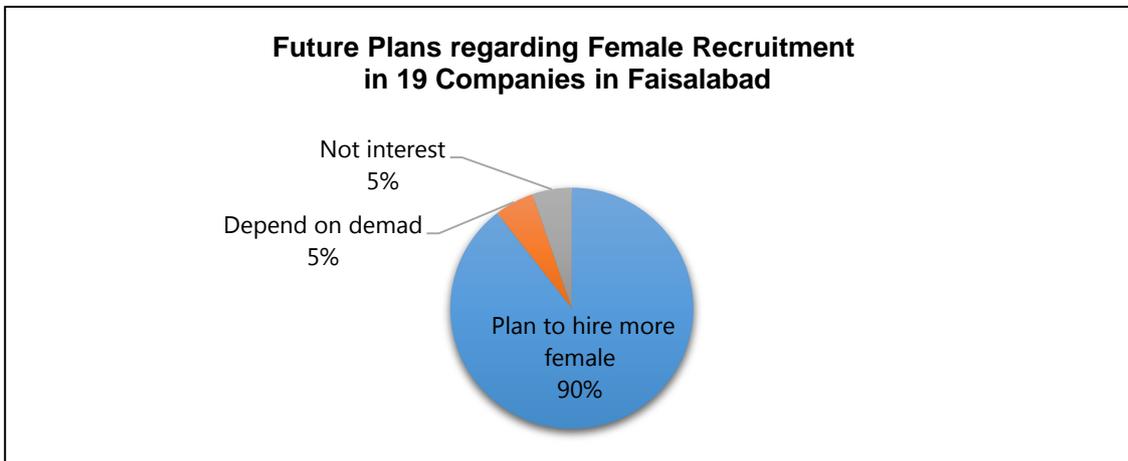


Figure 36. Future Plans regarding Female Recruitment in 19 Companies in Faisalabad

Figures 37 and 38 illustrate the percentage of companies interested in hiring females who have completed courses in garment manufacturing such as Production Management, Quality Management, Industrial Engineering (IE), CAD, Pattern Making and stitching. 90 % of the companies in both Lahore and Faisalabad showed their interest in hiring females who have completed a garment-manufacturing course, reflecting a significant interest in hiring females. A few companies in Lahore stated the reason that they would like to hire females was due to their ability and attitude, making good supervisors, showing good decision-making skills and demonstrating commitment. Various companies in Faisalabad identified specific attitudes and skills seen in women, such as being calmer, loyal, good negotiators and having strong managerial skills. In both districts, some companies were likely to require or prefer degrees in subjects such as textile engineering, MBA, quality and production management, along with some practical experience. For CAD, they required a diploma or a certificate along with experience. A small number of the companies preferred

experienced females over qualifications for those courses. A company which was not interested in hiring females for those positions answered that their company size is too small to allocate these positions. Other companies answered that they do not hire females due to their policy and the reasons were the same as mentioned above regarding hiring any female employee.

Encouraging more females to study the courses mentioned above, which are less popular among females than the course of stitching and fashion designing, would result in skilled females being able to contribute to the industry, whilst also promoting females to managerial positions within the industry.



Figure 37. Companies' Interest in Hiring Females for Production Management, Quality Management, IE, CAD, Pattern Making and Stitching in 48 Companies in Lahore

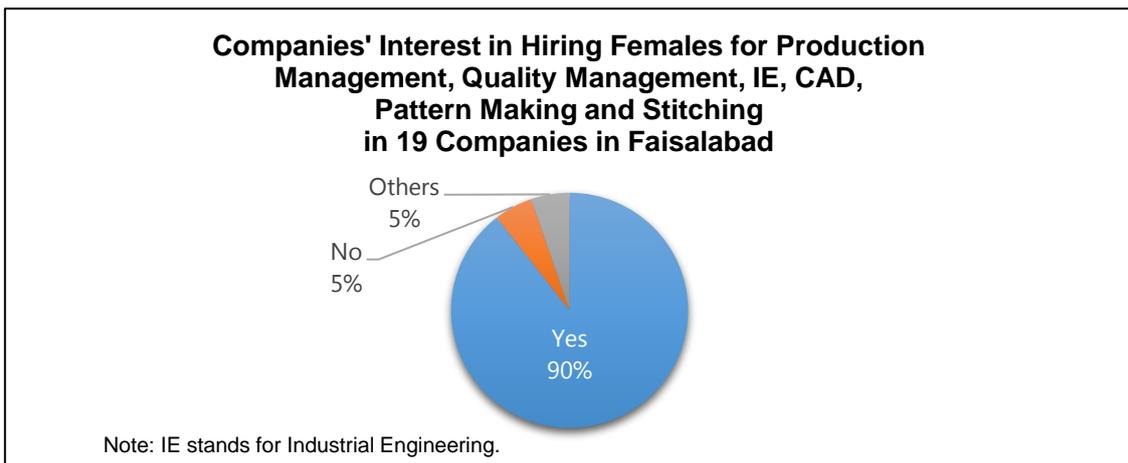


Figure 38. Companies' Interest in Hiring Female for Production Management, Quality Management, IE, CAD, Pattern Making and Stitching in 19 Companies in Faisalabad

3-2-2-3 Company Challenges regarding Female Employment

Table 6 shows answers from the companies in Lahore and Faisalabad regarding a gap in hiring female employees. The most common responses from companies in both districts regarding the gap in hiring female employees, is that they were likely to face fewer female applicants/employees due to issues of culture norms, a lack of skills, and restrictions regarding working times. The companies in Lahore also faced environmental and geographical issues, as well as a lack of training institutions in their locality. By contrast, the companies in Faisalabad were likely to highlight heavy workloads as an issue. There were also a number of companies in both districts which answered that they do not have any gaps in hiring female employees.

Table 6. Gap in Hiring Female Employment in 52 Companies in Lahore and Faisalabad

Common answers in Lahore and Faisalabad	District	Major answers (No. of respondents)
<ul style="list-style-type: none"> · Fewer female applicants /employees due to culture norms · Lack of skilled force · Working time constraints · No gaps 	Lahore	<ul style="list-style-type: none"> · Fewer female applicants (some companies explained the reasons as culture norms) (8) · Lack of skilled force (6) · Lack of training institutions near companies (3) · Working time constraints (3) · Lack of qualifications (2) · Environment (2) · Geographic issue (2) · No gaps (2)
	Faisalabad	<ul style="list-style-type: none"> · Lack of skilled force (8) · Fewer female employees due to culture norms (4) · Heavy work load (2) · Working time constraints (2) · No gaps (8)

Note: Total respondents are 35 companies in Lahore and 17 companies in Faisalabad.

The main response from the companies in Lahore and Faisalabad regarding constraints in hiring females, was that they were likely to face fewer female applicants due to culture norms (Table 7). In addition, the companies in Lahore were likely to face constraints of an unskilled workforce, while provision of facilities such as pick and drop transport services, day care centres and working time constraints were an issue for the companies in Faisalabad. There were also numerous companies in the both districts which answered that they do not have constraints in hiring female employees.

Table 7. Company Constraints to Hire Female Employee in Lahore and Faisalabad

Common answers in Lahore and Faisalabad	District	Major answers (No. of respondents)
<ul style="list-style-type: none"> · Fewer female applicant due to culture norm · No constraints 	Lahore	<ul style="list-style-type: none"> · Lack of skilled force (4) · Fewer female applicants due to culture norms (2) · No constraints (18)
	Faisalabad	<ul style="list-style-type: none"> · Fewer female applicants due to culture norms (4) · Working time constraints (3) · Pick and drop (2) · Day care centres (2) · No constraints (3)

Note: Total respondents are 29 companies in Lahore and 17 companies in Faisalabad.

Companies answered that they are likely to face fewer female applicants due to culture norms. Table 8 shows that the companies in Lahore highlighted the challenges of geographic issues, facilities for female employees such as pick and drop service and day care centres, as well as working time constraints. On the other hand, the companies in Faisalabad highlighted a lack of skills and qualifications and heavy workloads as being challenging for female employees. There were also a number of companies in both districts which answer that they do not have any challenges in female recruitment.

Table 8. Company Challenges of Recruitment of Females in Lahore and Faisalabad

Common answers in Lahore and Faisalabad	District	Major answers (No. of respondents)
<ul style="list-style-type: none"> · Fewer female applicants due to culture norms · No challenges 	Lahore	<ul style="list-style-type: none"> · Fewer female applicants due to culture norms (13 including 8 companies without reasons) · Geographic issues (6) · Pick & Drop (4) · Day care centres (2) · Working time constraints (2) · No challenges (8)
	Faisalabad	<ul style="list-style-type: none"> · Fewer female applicants due to culture norm (14 including 3 companies without reasons) · Lack of skilled force (5) · Lack of qualifications (5) · Heavy workloads (2) · No challenges (3)

Note: Total respondents are 33 companies in Lahore and 19 companies in Faisalabad

Table 9 shows the main responses from companies in Lahore and Faisalabad regarding company challenges of current female employment. The companies in Lahore were likely to state working time constraints, pick and drop, maternity leave and harassment regarding current female employment. Some companies answered that they face budget shortages to be able to offer transportation as well as day care centres. The companies in Faisalabad were likely to face the challenges of a high turn-over of staff after marriage, as well as being worried about the negative impact of having a mixed-gender working environment which could lead to distraction and harassment. There were also a number of companies in both districts which answered that they do not have any challenges in their current employment of women.

Table 9. Company Challenges regarding Current Female Employment in Lahore and Faisalabad

District	Main answers (No. of respondents)
Lahore	<ul style="list-style-type: none"> · Working time constraint (3) · Pick & Drop (2) · Maternity leave (2) · Harassment (2) · No challenges (12)
Faisalabad	<ul style="list-style-type: none"> · Turn over after marriage (3) · Co work environment (Negative impact) (2) · No challenges (8)

Note: Total respondents are 28 companies in Lahore and 18 companies in Faisalabad

3-2-3 Company Work Environment for Female Employees

3-2-3-1 Status of Company Benefits

In the comparison of work environments for female employees between large sized companies and small and medium sized companies in Lahore, it is observed that there is a notable disparity, with large companies providing more benefits and facilities than small and medium companies, except in the area of working hours.

As for the provision of transportation which was both the biggest challenge and expectation of women, Figure 39 shows that 85.7 % of large companies provided transportation facilities while only 50 % of small and medium companies offered this. In addition, several companies of both sizes provided door to door transportation services for females. 85.7 % of large companies provided insurance, such as social security and Employees Old-Age Benefits Institution (EOBI), while only 40 % of small and medium companies offered this. Similarly, 50 % of large companies offered day nursery provision, while 20 % of small and medium companies provided it. A number of the small and medium companies expressed that they cannot afford to provide transportation and insurance for females due to limitations within their budget. Furthermore, some of the small and medium companies stated that they cannot afford to invest in day nursery and they do not have enough space for this provision. These results illustrate there is a significant gap between the size of companies in Lahore in terms of the provision of benefits and facilities for females. That shows that small and medium companies face limited resources and are less likely to provide benefits and facilities for females in comparison to large companies.

Regarding working hours, which was the third highest challenge for women, 70 % of small and medium companies in Lahore provided flexible working hours for females, while 46.4 % of large

companies provided it. Some of the small and medium companies expressed that they can offer flexible working time for females without difficulty as the company is small and so it is easier to respond readily to females' needs. This shows that small and medium companies are more likely to be flexible with working time for female employees in comparison to large companies.

The result of the survey suggests that small and medium companies in Lahore may be more likely than larger companies to need more support to improve their benefits and facilities for females as they are more likely to face resource shortages.

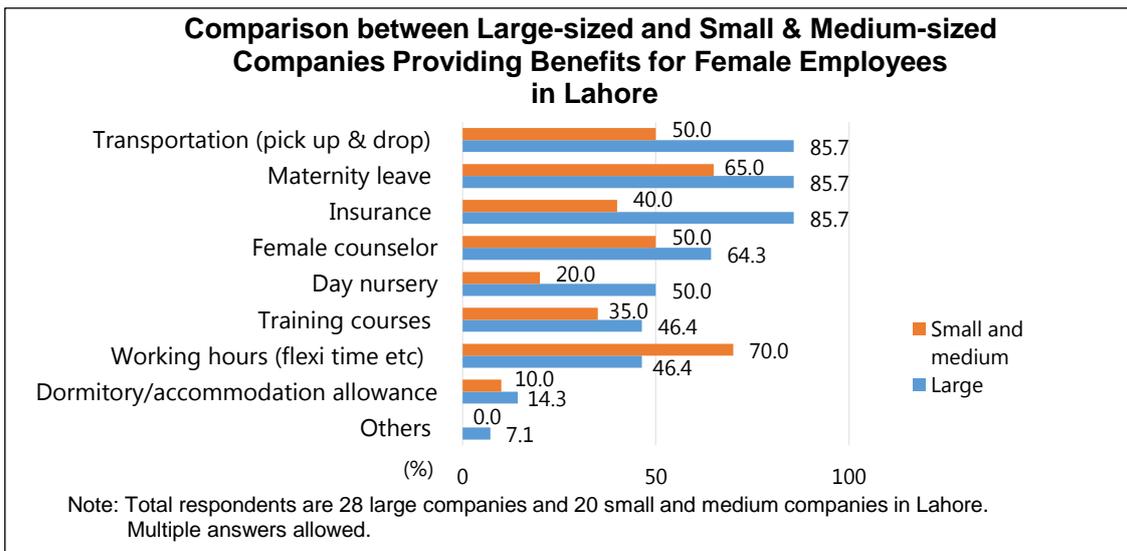


Figure 39. Comparison between Large-sized and Small & Medium-sized Companies Providing Benefits for Female Employees in Lahore

In the comparison between the large sized and medium sized companies in Faisalabad regarding the status of work environment for female employees, the larger companies are more likely to provide benefits and facilities for females, except in the area of training courses and working hours where medium sized companies offer more support.

Figure 40 shows that 80 % of large companies in Faisalabad provide transportation facilities, while only 44.4 % of medium companies offer it. Several companies of both sizes provide door-to-door transportation service to female employees. 60 % of large companies provide day nursery while no medium sized company offers it. A number of the medium companies in Faisalabad expressed that they face budget shortages to be able to provide transportation and day nursery care. 30 % of large companies provide a dormitory or accommodation allowance, while 11.1 % of medium companies provide these. This demonstrates a considerable disparity between large and medium sized companies. By contrast, large companies provide slightly higher benefits than medium sized companies, such as maternity leave, insurance and female counselors, which demonstrates

similar figures between the size of company.

On the other hand, 77.8 % of medium companies provide training courses and flexible working hours for females, while 70 % of large companies offer this, which shows just a small difference between the size of companies. As shown above in the comparison between the size of companies in Lahore, as a whole, the disparity of the provision of benefits and facilities is likely to be larger than the companies in Faisalabad.

The result therefore suggests that medium sized companies in Faisalabad may be likely to need more assistance to improve facilities such as transportation and day nursery care for female employees as they are more likely to face a shortage of resources in comparison to large companies.

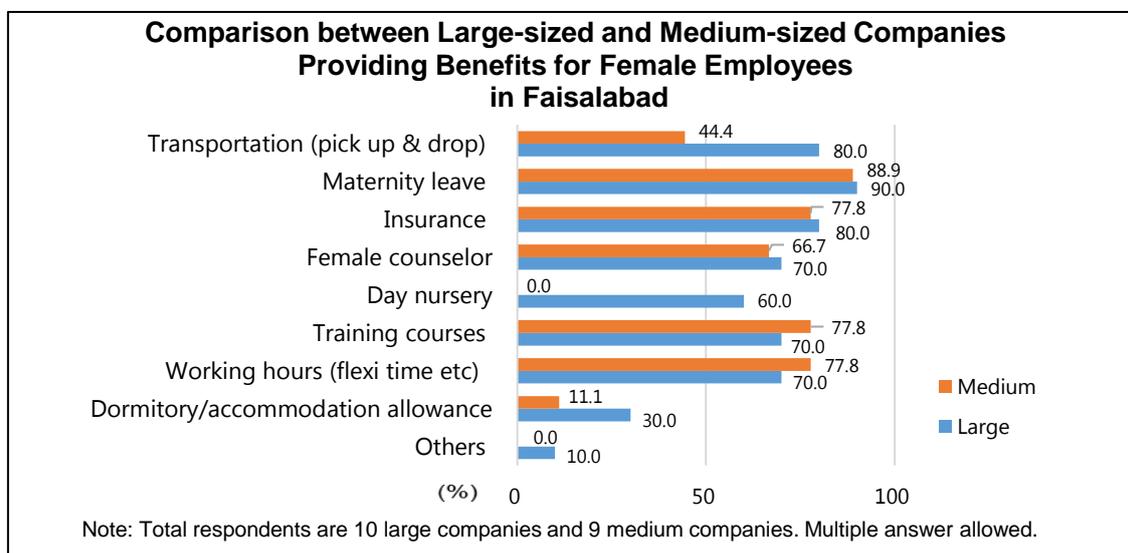


Figure 40. Comparison between Large-sized and Medium-sized Companies Providing Benefits for Female Employees in Faisalabad

3-2-3-2 Status of Female Friendly Environment

Figures 41 and 42 show the comparison of female-friendly facilities provided by large companies, and small and medium sized companies in Lahore and Faisalabad. 88.9 % to 96.4 % of both sized companies in each district had separate female toilets which was the highest expectation of women. 80 % to 92.9 % of both sized companies in Lahore had prayer rooms for females which was the second highest expectation of women. Whilst, 90 % of large companies in Faisalabad had separate prayer rooms, only 66.7 % of medium companies had them. 60 % of the large companies and 53.6 % of small and medium companies in Lahore had separate working space from males which was the fourth highest expectation of women, while only 20 % of large companies and 20 % of medium companies in Faisalabad had this. This illustrates that the companies in Lahore are more likely to have separate working space from males in comparison to the companies in Faisalabad.

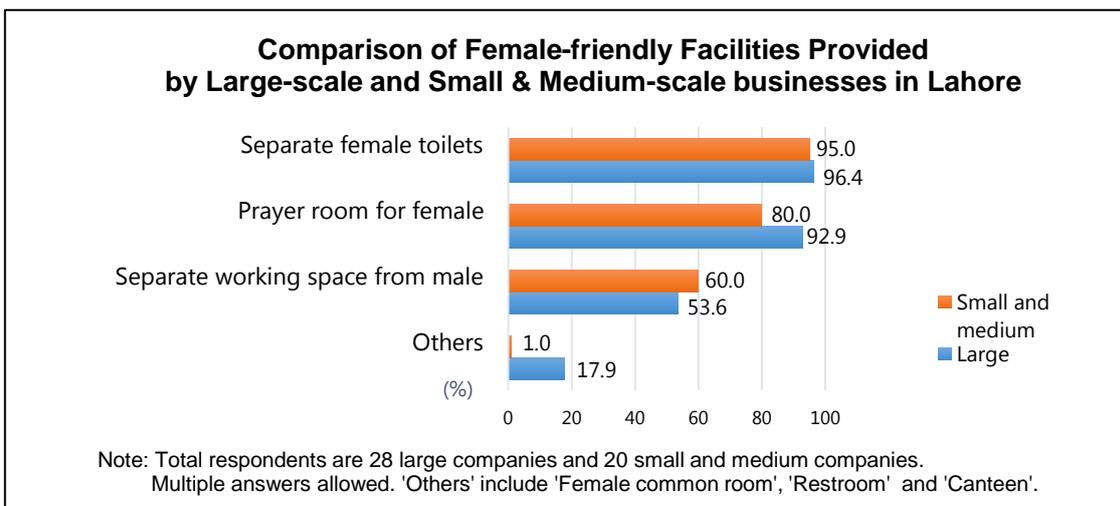


Figure 41. Comparison of Female-Friendly Facilities Provided by Large-scale and Small & Medium-scale Businesses in Lahore

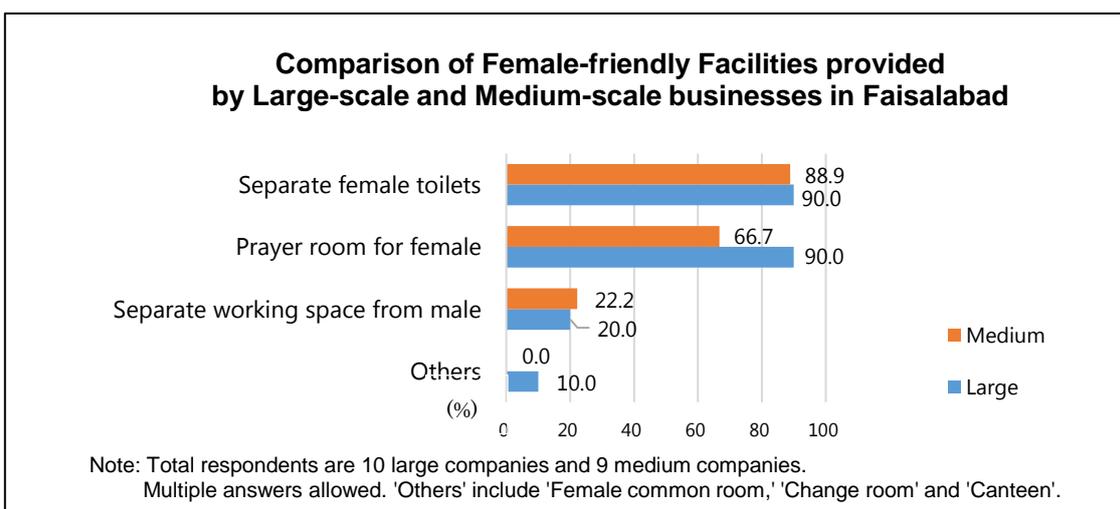


Figure 42. Comparison of Female-Friendly Facilities Provided by Large-scale and Medium-scale Businesses in Faisalabad

3-2-3-3 Status of Sexual Harassment Policy

Figures 43 and 44 show the status of whether sexual harassment policies are in place in the companies in Lahore and Faisalabad. 94 % of the companies in Lahore answered that they have a policy for sexual harassment, while 4% of the companies answered that they do not. One of the companies answered that the company scale is small and they can control this issue without a policy. However, this company stated that they would like to introduce a policy for sexual harassment in the future and they would like to receive guidance regarding developing a sexual harassment policy. Similarly, 89 % of the companies in Faisalabad answered that they have a sexual harassment policy.

A number of the companies in both districts incorporated their policies into their compliance or HR manuals. One large company in Faisalabad conducted periodic campaigns to raise awareness regarding harassment of employees. Some small and medium companies in Lahore and Faisalabad did not have an official manual regarding harassment; however, they had informal procedures at the companies. For example, one of the companies expressed that if an incident occurs, the management team would take strict action to investigate the incident by providing verbal notice or termination against the harasser in the case of abuse and harassment. Another company stated that they would immediately terminate an individual's contract if harassment is found.

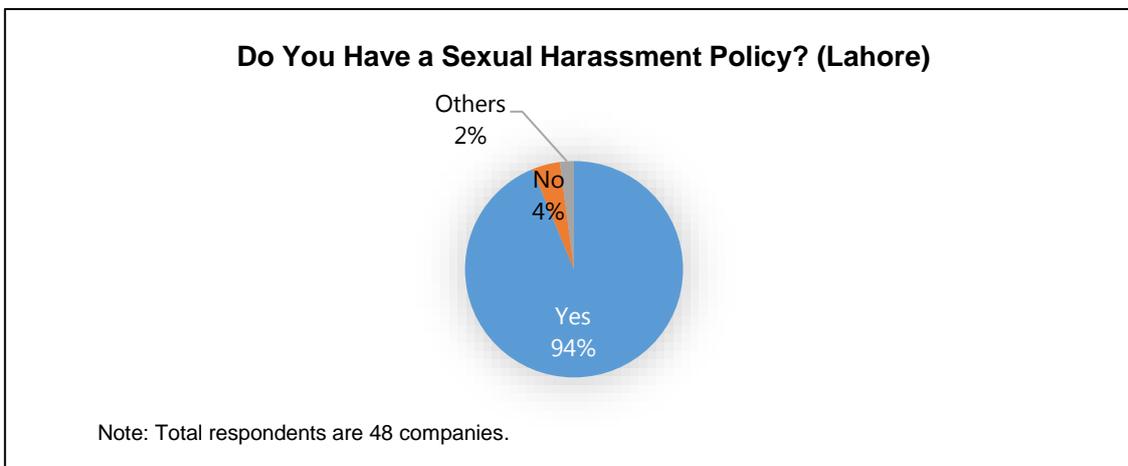


Figure 43. Do You Have a Sexual Harassment Policy? (Lahore)

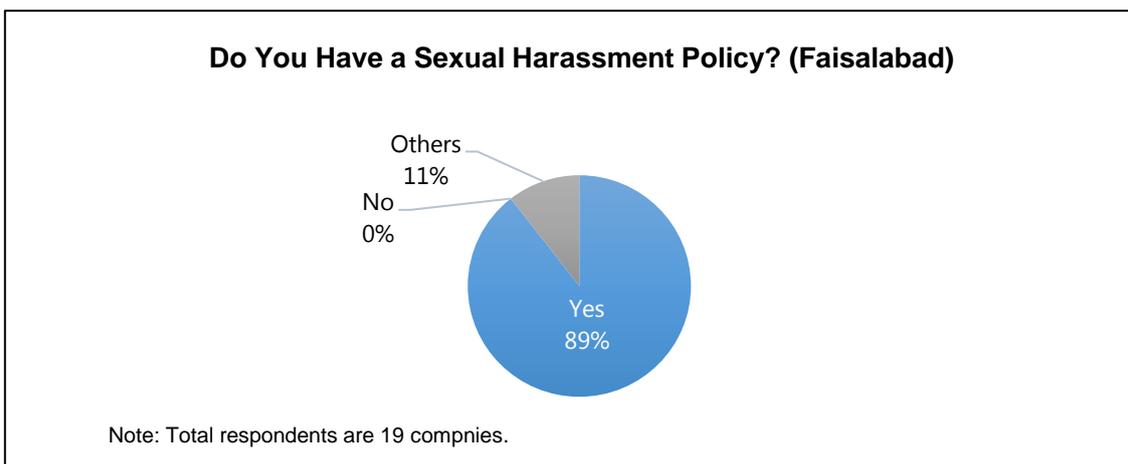


Figure 44. Do You Have a Sexual Harassment Policy? (Faisalabad)

3-2-4 Companies' Female Recruitment Advertising Channels

Figures 45 and 46 show the different means of advertising used by companies to recruit more female workers in Lahore and Faisalabad. The most used means of advertising in each district was

through personal connections. For example, in Lahore, this was 87.5 %, whilst 56.3 % of the companies used newspapers, 35.4 % used public forums, and 31.3 % used websites. Similarly, 94.7 % of the companies in Faisalabad used personal connections, 47.4 % of the companies used newspapers, 36.8 % of the companies used Public forums and 21.1 % used websites and public bulletin boards. The majority of companies in both districts expressed that they obtain new employees through their current employees. A few companies used public forums at local community and local gatherings. Several companies put banners at their factory gates and in the streets.

The results of the survey indicate that improving the working environment so that females can feel comfortable may bring more females to the company. As shown from the result of the survey in 3-1-3-4, the most used channel by women when they obtain a job is through personal connections.

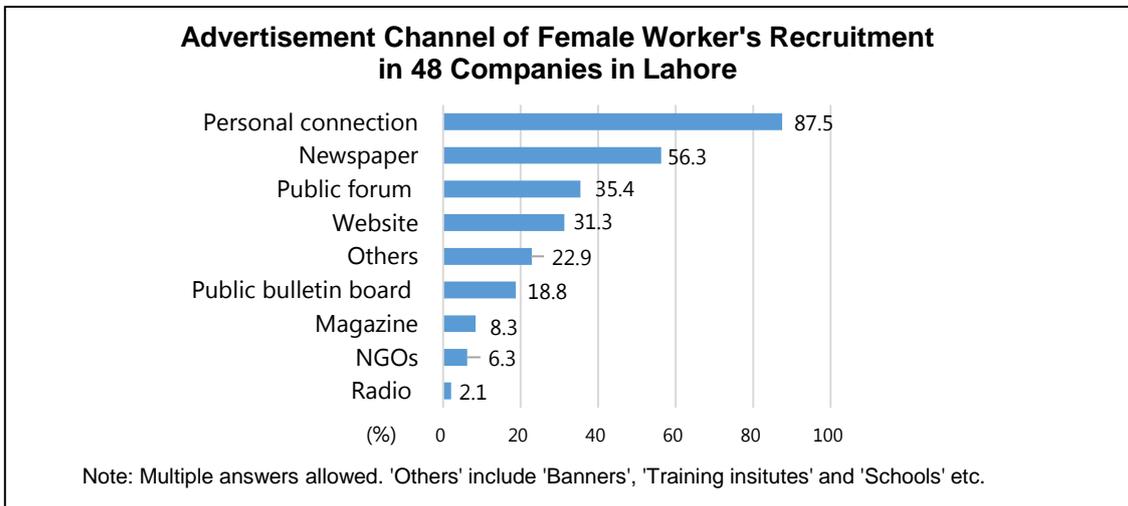


Figure 45. Advertisement Channel of Female Worker's Recruitment in 48 Companies in Lahore

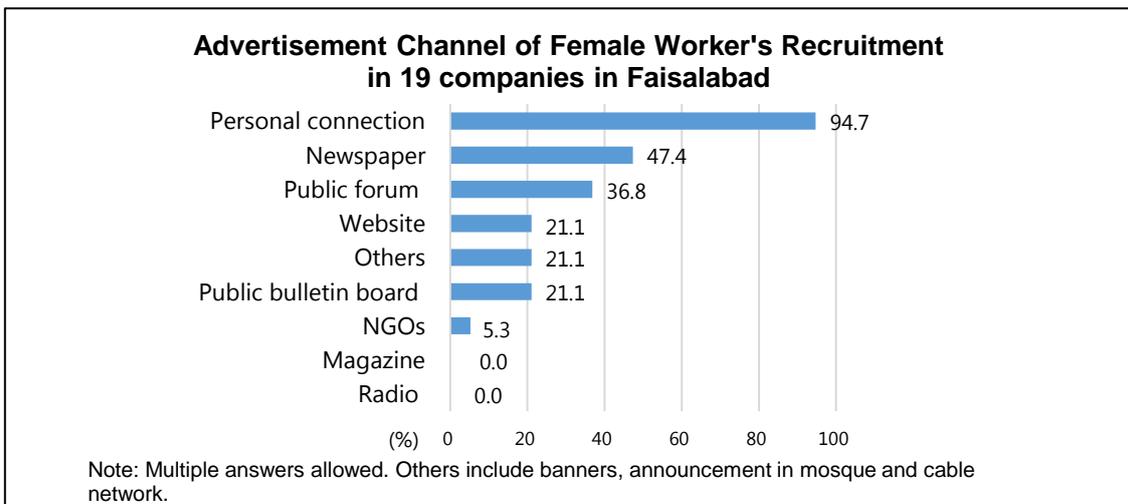


Figure 46. Advertisement Channel of Female Worker's Recruitment in 19 Companies in Faisalabad

3-2-5 Case Studies from Companies which Have a Higher Female Ratio in Lahore and Faisalabad

These case studies of two companies in Lahore and Faisalabad suggests three main features which may be a key factor resulting in successful female employment (Table 10 and 11). Table 4 in 3-2-1-1 shows the two companies which had the highest ratio of female employees among each of the companies in Lahore and Faisalabad. Company A had 89 % females and Company B had 57 %. The three common features are as below.

Firstly, the two companies have a specific plan of hiring females and recognizing females' strengths. Both companies prefer to maintain their current ratio of female employees as they recognize female strengths in terms of skills, such as taking pride in their work, and attitudes such as being punctual and focused. The priority of company B is to provide quality products to customers and the company believe that females are more likely to produce quality work. The clear plans and ideas of the company are linked directly to female employment which may result in promoting females.

Secondly, both companies share a common perception that the major reason for low employment of females is inappropriate environments rather than culture norms, which is different from the other companies surveyed. Both of them emphasize the importance of providing a suitable work environment for females. As seen from the result of the survey in 3-1-3-2, females are more likely to face challenges regarding the provision of transportation rather than opposition from their family. Both companies express that if the work environment makes females feel comfortable, then females may join and stay at the company for a longer period.

Thirdly, both companies provide not only facilities, but also the right conditions and environment in which females feel comfortable to work. Both companies provide door-to-door transportation to all female employees. The key finding of the survey was that transportation was the biggest challenge faced by women when they work as well as being the highest expectation. Providing transport for females can alleviate the challenges and help meet their needs so that females may be encouraged to apply for a job and continue to work. Furthermore, family members of females may feel secure to send females to the company if transport is offered. In addition, company A provides a day care centre. Both companies also provide permanent positions for all female employees, which gives them stability, in contrast to the uncertainty of a temporary contract. Company A considers suitable working times for females so they can return home earlier to do their housework. Company B has fixed hours, however they considered flexi time for females to respond to their needs. As for the environment for females, company A allocates a female social compliance officer who deals with sexual harassment, security and safety issues, as well as a nurse with the provision of a medical room and bed. Company A organizes committee meetings for females to discuss their opinions and problems every month. Training regarding sexual harassment, general health advice and local law

and safety issues, are provided regularly to female employees by the company. In a similar manner, company B has installed complaint boxes to record any sexual harassment in the work place. These facilities, conditions and environments may all contribute to encouraging females to work and stay longer at the companies.

Table 10. Case Study from a Company in Lahore

Case Study: Company A in Lahore
District: Lahore
Type of business: Knitted Apparel Manufacturing
Size of company: Large
Female ratio of total employees: 89 %
Status of female employee contract: Permanent
Interviewee: HR manager
<p>The management team prefers female employees and would like to hire females to maintain their current ratio of 89 %. This is because they perceive that females have a built-in sense of stitching and a good attitude such as being punctual, responsible and cooperative. The company also emphasizes the promotion of current female employees to manager positions.</p> <p>The HR manager expresses that the issue of receiving fewer female applications for employment is down to the working environment rather than culture norms. According to the HR manager, if a female friendly environment is available, then females are likely to join and stay at a company for a longer period.</p> <p>The company provides door-to-door transportation for all female employees. Furthermore, a day care centre is available, and a full time compliance officer deals with compliant issues such as sexual harassment, security, safety, hygienic water, first aid and emergency procedures. A full time nurse also takes care of the employees with the provision of medical room and bed. Moreover, suitable working hours for females are considered and set by the company from 7:00 am to 15:30 pm in order for females to be able to return home early. In addition to these, the HR manager organizes association committee meetings to have open communication sessions between the management and female employees to discuss views and problems openly every month. This committee also provides instructions regarding general health, safety issues and local law. The company provides sexual harassment trainings to the employees to raise awareness.</p>

Table 11. Case Study from a Company in Faisalabad

Case Study: Company B in Faisalabad

District: Faisalabad

Type of business: Woven Garments

Size of company: Large

Female ratio of total employees: 57 %

Status of female employee contract: Permanent

Interviewee: CEO

Company B was established with 90 % of employees being female using 20 machines because the former CEO preferred female employees, noting that female employees bring fewer management issues in comparison to male employees. They have been maintaining this high proportion, with women making up 57 % of the workforce and they intend to keep a similar ratio in the future.

The current CEO states that they prefer female employees because they deliver a quality-oriented product focusing on detail and quality work.

In answering whether culture norms hinder female employment, the CEO believes this is not the case but that the provision of an appropriate environment for females is crucial and this can lead to more female employees.

This company provides door-to-door transportation for all female employees as they consider that it is crucial for females. The company provides flexi time for female employees if it is required, although the company sets a fixed time. According to the CEO, if female employees like their working place, they will bring with them a group of females, around 8-10 in number. Moreover, complaint boxes against sexual harassment are also installed at the factory and strict action is taken by the company if any cases occur.

The company has time constraint issues with female employees and so the company has tried to solve the problem by allocating male contractors to cover the females.

3-2-6 Companies' Opinions regarding Coordination between the Public and Private Apparel/Textile Sector to Improve Women's Participation

The major suggestions from companies in Lahore and Faisalabad for coordination between the private apparel/textile sector, associations and government bodies such as the Ministry of Textile Industry and training institutes such as PKTI, PRGTTI and FETI to improve women's employment promotion are as follows:

(i) Coordination between the private apparel/textile sector, associations, government such as Ministry of Textile Industry and training institutes

- All should contribute to the enhancement of female employment as women are a significant economic contributor and will enable the country to flourish.
- There should be a communication channel established between the government, training institutes and industry so that those individuals who have completed their courses can be contacted by potential employers (e.g. by using a common website etc).
- Private public partnerships should develop proper career paths for females to boost their motivation to work.
- There should be a proper MOU/Standard Operating Procedures (SOP) between training institutes and private companies to train and hire a female workforce.
- Regular meeting should be organized by public and private organizations and more information regarding female employment should be shared among the stakeholders.
- There should be a study of companies' needs and periodic evaluations regarding female employment by the governments.
- The government should understand the situation on the ground and problems faced by smaller manufactures to make better policies to improve female employment.
- Awareness of female education, culture norms and a positive image of the apparel/textile industry should be promoted to improve female employment.
- Organize seminars and workshops to raise awareness, as well as capacity building within the industry by having public and private partnership.
- Establish more training institutes for females, and ensure they are located near the factories in industrial areas.
- The government should provide stipends for females at the training institutes.
- Public organizations can try to offer incentives to companies for the promotion of female employment.

(ii) Coordination between training institutes, associations and industry

- Training at the training institutes should fulfill the needs of industry.

- Companies should provide trainees to the training institutes to share good practice.
- Conduct training sessions at the training institutes with private textile and apparel organizations.
- Training institutes should send more of their trainees to industry for peer learning.
- Provide regular factory visits for the trainees at the training institutes.

(iii) Coordination between associations and industry

- Companies should also step up and increase the number of female employees by creating female friendly and conducive working/learning environments to help women remain motivated in the factories.

4. Summary of Key Findings

The results of the survey offer clear ideas and insights into the current situation, needs and challenges faced by the 75 interviewed women in Lahore and Faisalabad regarding study and work, and the current situation, needs and challenges faced by the 67 companies in the apparel/textile industry in Lahore and Faisalabad who were surveyed regarding female employment. It is suggested that the key findings be reflected in the practical implementations for the JICA PSDMD project, as well as other practices, in order to promote female participation in the industry in terms of reinforcing female training and employment. In addition, the results provide a baseline for further comparison with other data for the future.

The key findings of the survey are summarized below:

4-1 Gap between the Perception of a Company's Challenges and Women's Challenges

- The survey found that there is a gap between the perception of a company's challenges regarding female employment and women's challenges regarding work. Most of the companies in Lahore and Faisalabad pointed out that they face the challenge of receiving fewer female applicants with culture norms stated as one of the major reasons, while the women surveyed face more challenges with lack of basic facilities and long distances to work such as transportation, geographic issues and working hours rather than culture norms.

4-2 Female Motivation regarding Study and Work

- 96 % of the women in Lahore and Faisalabad showed interest in studying apparel/textiles. 'Stitching' and 'Fashion Designing' were the most preferred courses by the women in the districts. The other courses such as 'Pattern Drafting and Grading', 'CAD' and 'Quality Control' were less preferred by the women than the above mentioned two courses. The information of these other courses could be disseminated more to women to raise awareness.
- 98 % of the women in the two districts had a desire to bring change to their socioeconomic status. The major reason was to support their family, mainly due to economic reasons.
- 93 % of the women in two districts showed interest in work and 76 % of the women showed their interest in working in apparel/textile companies. 20 % of the women preferred to work at home and being self-employed, showing no interest in working for a company. The figures suggest that female participation could be enhanced by promoting not only company employment but also home-based work and self-employment in order to respond to their needs and increase female participation in the industry.

4-3 Challenges Faced by Women in Study and Work

- Transportation was the biggest challenge which surveyed women in Lahore and Faisalabad face

when they study and work. 85.3 % of the women faced the challenge of transportation in study and 61.3 % in work. A number of the women answered that they cannot afford the daily cost of transportation, which shows concern regarding the financial implications of accessing work. 76 % of women faced the challenge of distance in order to study, while 56 % faced this challenge regarding accessing work, the second biggest challenge faced by the women. Almost half of the women faced challenges in studying such as concerns about school fees, security and study environment. 54.7 % of the women saw working hours as being an issue, 37.3 % mentioned inadequate working environments, 34.7 % faced concerns about security and 30.7 % were concerned about finding childcare if they found employment.

- Opposition from family was a relatively small challenge faced by women wanting to access study and work, in comparison to other challenges such as transportation and distance. 13.3 % of the women faced the challenge of opposition from their family regarding studying, while the figure was 8 % for those wanting to access work.
- Single women in the districts were more likely than married women to face the challenges of opposition from their family, inadequate study environments and concerns about security when considering studying. On the other hand, married women were more likely to face the challenge of accommodation whilst studying.
- Married women in the districts were more likely to face the challenge of day nursery provision and inadequate working environments when they work in comparison to single women. Some of the married women expressed their needs to access childcare provision as they do not have any families or relatives to ask to take care of their children. By contrast, single women were more likely to face the challenge of security and opposition from their families towards work.
- In the comparison by districts between the women in Lahore and Faisalabad regarding challenges in study, the women in Faisalabad were more likely to face the challenge of security, study environment, school fees, distance and transportation, in comparison to the women in Lahore. 87 % of the women in Faisalabad, whereas 34.6% of the women in Lahore, faced the challenge of security, which shows a remarkable difference between the areas. Several women in Faisalabad answered that they would like to access training; however, they are worried about security issues when they go out and attend training courses.

4-4 Women's Expectations of Training Institutes and Companies

- Transportation was the most expected facility by the women in Lahore and Faisalabad when they study, followed by school fee subsidies. Several women answered that they cannot afford the daily transportation costs and school fees, highlighting economic challenges. 86.7 % of the women expected transportation, 74.7 % expected school fee subsidies from training institutes. Around 50 % to 60 % of the women expected internship programmes, support in finding

employment and support with study hours.

- In the comparison between single and married women in the two districts, single women were more likely to expect provision such as internships from training institutes, while married women were likely to expect facility and financial supports. Single women were more likely to expect internship programmes and support of employment, study hours, student loans and female teachers at the training institutes in comparison to married women. On the other hand, married women were more likely to expect transportation, school fee subsidies and day nursery provision than single women.
- 76 % of the women expected separate female toilets at the company, which was the highest expectation. 72 % of women expected prayer rooms for females, 62.7 % expected transportation and 61.3 % expected separate working spaces for women. The majority of the women answered that separate female toilets should be compulsory at companies in order to protect their dignity.
- When considering work and study, married women were more likely than single women to face challenges regarding childcare provision. Around 52 % of married women expected day nursery provision at school/training institutes and around 39 % of married women faced the challenge of day nursery care when working.

4-5 Women's Access to Financial Information regarding Training Institutes and Companies

- 40 % of the women in Lahore did not have access to subsidy information regarding transportation and school fees of training institutes, while 70 % of the women in Faisalabad did not have this access. A large number of the women answered that if they had this information, they would have applied for the admission of the training institutes and they also showed a willingness to study in the future. Therefore, if access to information is improved, it is expected that the number of women who apply for the training institutes will increase.
- 56.6 % of the women in Lahore and Faisalabad were aware of the transport subsidy offered by the apparel/textile factory, 34 % of the women knew about training courses at the company, and 18.9 % of the women knew about day nursery. Therefore, if companies could disseminate their information to women more effectively regarding transportation, training courses and day nursery, this may motivate more women to apply to the company.

4-6 Channels Used by Women regarding School/Training Institutes

- The most frequently used information channel by the women in Lahore and Faisalabad regarding school/training institutes was personal connection, with 74.7 % of women using this approach. 34.7 % of women used newspaper as a second means to access information, whereas 22.7 % used TV. In the same manner, the most used channels by women regarding job information was personal connection, with 69.3 % accessing information this way. 28 % used

newspaper as a second channel, 20 % used schools and 14.7 % used websites.

4-7 Challenges Faced by Companies regarding Female Employment

The result of the survey suggest that the surveyed companies in Lahore and Faisalabad perceive that they are likely to receive fewer female applicants due to culture norms, lack of skilled force and time constraints regarding female employment. In addition, companies from both districts are likely to face the main challenges of inadequate company systems and budget issues to be able to promote female friendly environments for current female employees.

- Major common gap faced by the companies in Lahore and Faisalabad regarding hiring female employees was receiving fewer female applicants/employees due to culture norms, lack of skilled workforce and working time constraints.
- Major common constraint faced by the companies in the districts regarding hiring female employees was culture norm which hinders females from applying to a company.
- Major common challenges faced by the companies in the districts regarding female recruitment were receiving fewer female applicants due to culture norms and lack of skilled force.
- Major common challenges faced by the companies in the districts regarding current female employment were systems and budget issues to create female friendly environments such as backup system and transportation facility.

4-8 Companies' Views and Needs regarding Female Employment

- Female employees were principally viewed by the companies in Lahore and Faisalabad on the basis of their attitudes such as focus and punctuality as their strengths in apparel/textile industry. Except for the attitudes, it was observed that companies in Faisalabad were more likely to view their skills such as stitching as their strengths while companies in Lahore were more likely to view their attitudes.
- 'Finishing, packing and clipping' were the most demanded sections for female workers by 34 % of the companies in Lahore. By contrast, 'stitching' were the most demanded sections by 40 % of the companies in Faisalabad. The top three demanded sections by the companies in the both districts for female workers were 'finishing, packing, clipping', 'stitching', and 'quality inspection'.
- 63 % of the companies in Lahore had a plan to hire more females, in comparison to 90 % of the companies in Faisalabad. It was observed that more companies in Faisalabad demonstrated a specific plan
- 2 % of the companies in Lahore answered that they do not have a plan to hire females due to their policy, while 5 % of the companies in Faisalabad had the same reason.

- 90 % of the companies in Lahore and Faisalabad showed their interests in hiring female employees who completed courses in Garment Manufacturing like production management, quality management, Industrial Engineering (IE), CAD, pattern making and stitching, which shows significant interest from the companies in the both districts.

4-9 Status of Company Work Environment and Women's Challenges and Expectations

- The number of female employees in the companies in Lahore was 15 percent while 22 percent for the companies in Faisalabad, which illustrates that the number of female employees in the companies in the both districts, is much less than the number of male employees. The survey found that three out of 67 surveyed companies in Lahore and Faisalabad had a higher female employment ratio than males'. Two companies in Lahore had female employment ratio with 89 % and 82 %. The other company in Faisalabad had female ratio with 57 %.
- The percentage of female managers in large sized companies in Lahore was 8 %, while 9 % for small and medium companies in the same district, which shows an almost similar ratio between the size of the companies. By contrast, the percentage of female managers in large companies in Faisalabad was 12 %, while only 2 % for medium companies in the same district, which shows that the ratio of large companies is six times higher than the small and medium companies.
- As a whole, the number of female managers of the large companies in Faisalabad was higher than the same sized companies in Lahore. By contrast, the number of companies in Lahore which promote female managers was likely to be larger than the number of the companies in Faisalabad.
- There is a notable disparity between large companies and small, medium companies in Lahore in terms of the provision of benefits and facilities for women. The large companies in the district provided more benefits and facilities than the small and medium companies, with the exception of working hours. 85.7 % of large companies provided transportation which was the biggest challenge as well as expectation of women regarding work, while only 50 % of small and medium companies did so. 85.7 % of large companies, and only 40 % of small and medium companies, provided insurance for women. A number of the small and medium companies expressed that they cannot afford to provide transportation and insurance to females due to limited budgets. The findings of the survey propose that small and medium companies may need relatively more support in comparison to large companies to improve their benefits and facilities for females to encourage women to work.
- 70 % of small and medium companies in Lahore provided flexible working hours for females, while around 46 % of large companies provided such facility, which shows that small and medium companies are more likely to be flexible with working hours.
- There is a remarkable disparity between the size of companies in Faisalabad in the provision of

transportation and day nursery. 80 % of large companies in Faisalabad provided transportation while only 44.4 % of medium companies provided it. Moreover, 60 % of large companies provided day nursery while no medium companies do, which illustrates a significant disparity between the size of the organisation. A number of the medium companies in Faisalabad expressed that they face restricted budgets to provide facilities such as transportation and day nursery. The result suggests that medium sized companies in Faisalabad may need more support to improve their facilities for females as they are likely to face the limitation of recourses.

- Approximately 89 % to 97 % of large scale companies and small and medium companies in Lahore and Faisalabad had separate female toilets which was also the highest expectation from the surveyed women.
- Around 80 % to 93 % of both sized companies in Lahore and large companies in Faisalabad had prayer rooms for females which was the second highest expectation by the women, while around 67 % of the small and medium companies in Faisalabad had it.
- The ratio of companies in Lahore which had separate working space for females was higher than the ratio of the companies in Faisalabad. 60 % of the large companies and 54.6 % of small and medium companies in Lahore had separate working space away from males, which was the fourth highest expectation by the women, while 22.2 % of large companies and 20 % of medium companies in Faisalabad had it.
- 94 % of companies in Lahore and 89 % of the companies in Faisalabad answered that they have policies for sexual harassment. A number of companies in each district did not have an official manual; however, they have informal procedures.

4-10 Companies' Advertising Channels for Female Recruitment

- The most used advertising channel to recruit female workers by the 67 companies in Lahore and Faisalabad was through personal connections. The result suggests that improving the work environment where females feel comfortable at work may attract more females to the company through current female employees.

4-11 Case Studies from Companies which Have Higher Female Ratio

- Case studies from two companies which had the highest number of female employees among the 67 surveyed companies from each districts of Lahore and Faisalabad suggest three common features that may be a key factor leading to successful female employment. Firstly, the two companies had explicit plans of female recruitment and recognize females' strengths in terms of skills and attitudes. Their clear plans and ideas for the company may have a direct impact on female employment and this may result in recruiting more females. Secondly, both companies shared a common perception that the major reason for low female employment is due to

inappropriate working environments rather than culture norms, which is different from the other companies surveyed. The companies considered that reinforcing female friendly environment is significant. Thirdly, both companies provided not only facilities such as transportation but also the right conditions and environment in which females may feel comfortable to work. The key finding of the survey was that transportation is the biggest challenge faced by women when they work as well as the highest expectation. Moreover, the two companies provided door-to-door transportation facilities for all female employees which may alleviate some of the challenges women face in accessing work. Consequently, this may encourage women to apply for a job, and to then work and stay longer at the company.

5. Recommendation

The results of the survey show clear areas for intervention to help reduce the gap between women and men in terms of involvement in the apparel/textile industry, as well as reinforcing women's participation in the industry in the short term and highlighting longer term interventions. The interventions can be conducted comprehensively by enhancing Public Private Partnership through the project implementation and activities of Taskforce for Women Empowerment of JICA PSDMD Project as well as other practices to effectively promote women's economic empowerment⁵.

The recommendations from the survey are below:

5-1 Improvement of Study and Work Environment for Women

- Provision of transportation and free training for female applicants at the training institutes, should be available in order to reduce challenges and encourage women to study and access training. Moreover, the improvement of security and study environments, as well as internship programmes, employment support, consideration of study hours, female teachers, day nursery and student loans are also crucial in order to encourage women to study and access trainings.
- Provision of transportation facilities for women in the industry, should be put in place in order to reduce challenges and encourage more women to participate. In addition to this, providing other facilities, conditions and an environment in which females feel comfortable at work can encourage women to participate in the industry. For example, consideration of working hours, improving working environments such as prayer rooms, separate working space, day nurseries, security, insurance, maternity leave, training courses and female counselors for female employees.
- Raise awareness to improve female friendly environments, as well as promote female participation at companies and training institutes through trainings, seminars and workshops.
- Provision of day nursery at the training institutes and companies for married women in order to respond to the needs of married women.
- Promote the need for harassment policy awareness and training at the training institutes and companies.

5-2 Enhancement of Information Dissemination as well as Raising Awareness in the Targeted Communities and Industries

- Strengthen information dissemination regarding subsidies and courses at training institutes in order to encourage women to get training in the communities through enhancing coordination with local channels and NGOs by training institutes.

⁵ The conceptual framework of Women Economic Empowerment combines the two inter-related and mutually reinforcing aspects of "economic advancement" and "agency" (the power to make choices and decisions for one-self). *Women's Economic Participation and Empowerment in Pakistan Status Report 2016, UN Women*

- Raise awareness in the targeted communities to encourage women to access trainings and work through organizing events, seminars, workshops and media from training institutes and within the industry.
- Enhance the channel of personal connection by women and develop other channels besides the personal connections in order to encourage more females to access training institutes and companies (e.g. through cable TV, banner, bill board, collaboration with NGOs etc.).

5-3 Strengthening of the Career Support System at Training Institutes through Collaborations with Industry to Promote Female Employment.

- Reinforce career support systems at the training institutes to show the career path for female students such as company employment and self-employment by enforcing close partnership and coordination between training institutes and industry.
- Provide programmes such as company visits and internships to develop connections and understandings of the industry, and training and seminars to demonstrate various paths for female students.

5-4 Promoting Variety of Courses of Training Institutes to Women

- Encourage females to study courses in Garment Manufacturing such as Production Management, Quality Management, Industrial Engineering (IE), CAD and Pattern Making which are less popular amongst women in comparison to the courses of Stitching and Fashion Design. This can help promote skilled females to the industry.

5-5 Enhancement of Support for Small and Medium Scale Companies regarding Female Employment.

- Support small and medium scale companies which are more likely to face a shortage of resources to improve the female friendly environment, facilities and benefits such as transportation, prayer room, separate working space, day nursery, maternity leave and insurance as well as in-house training by providing technical support and subsidies. For example, establish collective transportation and day care centers in order to reduce companies' burdens by forming groups across companies etc.
- Strengthen the link between related institutes which have subsidy schemes for female friendly work environments amongst small and medium companies.
- Develop collaborations between training institutes and companies in order to enhance the training capacity for females in companies.



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