



# Gender Impact of Trade Liberalization in the MENA Region

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## Preface and Acknowledgements

Globalization and Gender: Economic Participation of Arab Women” is the first of Cawtar flagship Arab Women Development Reports. It was published in 2001 and its value remains to the fact that it is the first of its kind in the Arab region as it attempted to capture the implications of Globalization for Arab Women’s economic empowerment.

There is a general consensus that liberalization, a directly related globalization process, has differential gender outcomes within Arab countries. In the framework of the Middle East and North African Development Forum phase 5 (MDF5), CAWTAR has been mandated to build this special body of knowledge through a call for papers which are actually published in this volume and consolidated in a regional report entitled “Gender impact of Trade Liberalization in the MENA Region”.

As a matter of fact, despite the strides of women in the education sector, the decrease in the average fertility rate and the increase of marriage age, gender discrimination persists in other key sectors. In order to address this challenge, it is imperative to conduct an in depth survey as a benchmark for understanding women's realities, identifying problems and lobbying policy change on scientific grounds.

This is to be considered as one of the main will and ambition of this contribution, which is to be drawn upon in the “Forum for Reforms” to stimulate constructive dialogue.

This publication is organized as follows: first, Olmsted introduces the report by addressing a brief overview on the liberalization contrasted impacts in the MENA region in general, with an emphasis on Women’s situation in particular. The report compiles specialized case studies focusing on Trade effects on Women, submitted by Assaad, Nassar, Ben Slama and Sensen throughout Morocco, Egypt, Tunisia and Turkey. Finally Moghadam produced the conclusion and policy recommendations which came out of above studies and the expert meeting held to conceptualize the components of the regional report consolidated by Ben Slama in July 2005 in Hammamet, Tunisia. In the meantime, Ben Slama performed a synthesis chapter of all the papers presented in this report, which will be published separately.

CAWTAR acknowledges the efforts of authors in preparing this volume as well as addresses its gratitude to those whose papers have not been selected in the Center's research competition.

CAWTAR also expresses its acknowledgements to World Bank and United Nations Development Program as well as all MDF5 partners as they have accredited CAWTAR to monitor and coordinate mainstreaming gender, in terms of formulation and implementation, in the MDF5 key areas for institutional reforms in the MENA region.

**Soukeina Bouraoui**  
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# I. Introduction

By Jennifer C. Olmsted

A considerable and growing literature examines questions of how economic liberalization affects women and gender relations, although this question has received limited attention in the context of the Middle East and North Africa (MENA). Even in cases where researchers have focused on the impact of liberalization on Arab and Middle Eastern women, some aspects of this question have been explored in more depth than others, and considerable gaps remain in this literature. The aim of this report is both to present some new research that sheds light on our understanding of how liberalization affects women in MENA, as well as pointing out the numerous gaps that remain in the literature.

Liberalization, which has in recent years been closely associated with structural adjustment policies in many cases, involves reshaping national economies so government intervention is reduced and market signals determine economic outcomes in a number of areas. Reductions in government expenditures, privatization of government assets, changes in the financial sector, and the elimination of trade barriers are among the policies generally implemented. Debates among economists have generally focused on whether liberalization is an effective economic strategy, as well as discussions about the merits of various paths to reform and the impact such reforms have or are likely to have on various segments of the population.

While initially it was assumed that liberalization was a gender neutral process, changes in government policies have and continue to have differential effects on men and women and may in addition lead to changes in gender expectations and duties (Beneria 1999, Pyle and Summerfield 1999). Of particular concern to feminist scholars has been the fact that liberalization policies may be more detrimental to women, for a number of reasons. One concern is that cuts in spending, particularly in the areas of health and education, may impact females more than males. Not only may women and girls be negatively impacted directly by such cuts, in terms of reductions in their access to government services, but an additional hidden cost of such cuts may be an increased unpaid work burden on women, as health and educational services are

again expected to be provided within the household. In addition, in cases where women have been more highly represented in the public sector, they may suffer larger proportional job losses due to down-sizing efforts.

Elimination of trade barriers, on the other hand, has often been seen as a way of increasing women's employment opportunities. This assertion though is not uncontested (Avin 1999). First, the question of whether more open trade increases economic opportunities for women must be examined on a country by country basis, since the structure of the underlying economy and the type of liberalization that occurs will affect the types of jobs gained and lost during such a transition. Even when women do gain in terms of net employment opportunities, feminists have raised concerns about the kinds of jobs women obtain through trade liberalization, as well as which members of a society are left to take care of non-market reproductive chores. In many cases this burden continues to fall on the shoulders of women who enter paid employment, thus leading to a double burden.

In discussing the particulars of liberalization reforms in the Arab world, it is important to note that how liberalization is carried out depends on the types of economic policies initially in place, as well as on the motivation and resources of various governments. The Gulf countries, for instance, have considerably more resources, which has given them more flexibility in terms of how they respond to pressures to liberalize. So while certain generalizations can be made about the existing structure of government policies among Arab countries when liberalization policies were introduced, it is also important to keep in mind how both the structure of initial policies, as well as the pace and scope of liberalization, differed.

Some general points though can be made about the region, prior to liberalization. Two major factors made up the government sponsored safety net in most countries. The first was the subsidization of various foods. Algeria, Egypt, Iraq, Jordan, Morocco, Tunisia and Yemen (World Bank 2002, Al-Ali 2005) were among the countries that introduced price controls/subsidies, to ensure that various basic commodities were affordable to their populations. These programs were politically

very popular and efforts to phase them out have on a number of occasions met with resistance (Richards and Waterbury 1996). As a result, while Algeria and Jordan have eliminated these programs completely, other countries have been slower to phase them out (World Bank 2002).

Most Arab governments also created large public sectors, which may have included both extensive administrative sectors and state run economic enterprises. These large government sectors also came to be seen by much of the population as a legitimate component of the safety net, since they were one factor contributing to keeping unemployment rates low. Even in the 1990s, after liberalization efforts had begun, public sectors remained large. The World Bank reports that while the percent of the labor force employed in the public sector has declined in Algeria, Jordan, Morocco and Tunisia, in the Gulf countries, as well as Egypt, the percent has risen, with rates as high as 80 percent in a number of Gulf countries (World Bank 2004c).

In terms of trade policies, most Arab governments followed import substitution policies (heavy restrictions on imports, often accompanied by government subsidies to or direct management of various industries) in the 1960s and 70s. In the 1970s and 1980s a number of countries introduced reforms, although the extent to which changes in more open trade policies have been effective varies. For instance, Tunisia and Morocco have long histories of trade reforms aimed at opening trade, although trade barriers in both countries remain substantial. Countries such as Syria and Algeria have also historically been fairly closed and have been more reluctant to introduce reforms. Trade barriers in Yemen and Lebanon on the other hand are considerably lower (World Bank 2004b).

It should also be noted that the ability of a number of Arab countries to engage in various forms of liberalization has depended not only on internal policies, but also on global conditions. Sudan, Iraq and Libya for instance have been the subject of boycotts/sanctions (Garfield 1999), limiting their ability to engage in the global economy. Similarly, the Palestinian economy has faced considerable limitations on its access to the international economy, due to Israeli occupation (Farsakh 2000). Even among countries that have

not been involved in long-standing military conflicts, the ability to trade is dictated both by domestic as well as foreign policies. Trade policies made by the European Union and the US in particular may impact Arab economies in ways that cannot be controlled domestically.

Given the numerous aspects of liberalization that have been carried out in varying ways and at different paces in various parts of the Arab world, the task of determining how these changes have affected women in various communities is a daunting one. And an examination of the existing literature on the gendering of liberalization reforms suggests that to date there are only a limited number of studies, primarily focusing on particular aspects of liberalization in individual countries.

One problem with determining how women have fared since liberalization is that in many cases very little is known about how women were faring in the pre-reform period, making it difficult to establish what changes have occurred since policy reforms were initiated. Difficulties also arise because the pace and consistency with which countries have implemented reforms has not been even. The impact of reductions in the size of the government sector has probably received the most focus, although even concerning this topic, large gaps in our understanding of what changes have occurred and how these have affected women remain.

The situation in Egypt, a country where dependency on government employment remains relatively high (compared to the other non-Gulf countries in the region), and relatively feminized, has been discussed by a number of authors. One of the earliest published articles, by Mervat Hatem (1994) argued that the predicted cuts in spending in the public sector would be particularly harmful to women, given their higher dependency on this sector for paid employment. Later empirical work by Ragui Assaad (1997) confirmed this finding, while pointing out that the impact on women was somewhat different than what was initially predicted. Rather than cutting the number of positions, as was expected, the Egyptian government chose to reduce spending by freezing wages, while actually continuing to increase the size of the public sector. In fact, between 1988 and 1998 the share of public sector employment actually

rose from under 30 percent to almost 40 percent in Egypt (World Bank 2004c) with as many of 50 percent of women depending on the public sector for employment. Assaad argues that declining wages drove male workers out of the public sector, but that women still find government positions appealing, and therefore the government sector in Egypt is even more feminized than before, with women willing to accept these positions, despite large drops in real wages.

While Assaad's work sheds light on the sometimes unpredictable ways that government responses to pressure to liberalize have played out, further work is needed to uncover the reasons why women's employment options in Egypt remain so limited, as well as what the implications of this finding are for women's empowerment. Are women unable or unwilling to find work in the private sector? Do women's reproductive burdens impede their ability to accept positions in the private sector? Alternatively, do employers simply assume that women's productivity is lower than men's, which precludes them from hiring women? Later work by Assaad (2003) and Assaad and Arntz (2005) suggests that some of these issues may be relevant in the Egyptian case, and that women's lack of geographic mobility may be an additional factor limiting Egyptian women's access to private sector work. The finding that women may be less mobile in Egypt than men in turn raises questions about whether policy makers should be addressing this problem, perhaps by improving the availability and safety of public transportation. Broader questions also need to be asked about whether such trends are being observed in other parts of the region, or whether these results are unique to Egypt. Far less is known about other Middle Eastern countries, despite the fact that in a number of cases reductions in the size of government have occurred. Moghadam (2005) points out that in many MENA countries female unemployment rates are considerably higher than male rates and that this may be linked to shrinking public sectors, although more detailed research in various country contexts is needed to provide more detail concerning this finding/trend.

The literature addressing how trade reforms have affected women's employment opportunities is also limited. An early contributor to this question

was Moghadam (1995), who argued that women in countries such as Tunisia and Morocco, which have pursued more export oriented policies with an emphasis on manufacturing, have had considerably more employment opportunities than in other Arab countries. A number of articles (Cagatay and Berik 1991 and 1994, Baslevant and Onaran 2004) examining the opening of trade have focused on Turkey, perhaps due to the fact that data in Turkey are more readily available, and also because Turkey's policies are more open than others in the region. The most recent study, by Balevent and Onaran does not find a strong link between Turkey's export orientation and women's labor force participation. Given that trade reforms have remained limited in much of rest of the region, one focus that future research might take is in speculating about how changes in trade policies are likely to affect women, keeping in mind that the patterns in MENA suggest that predicting this impact may be complex.

Researchers have also examined how extensive military conflict in Iraq, Palestine and other parts of the region has impacted women's ability to participate in the paid economy and the role that conflict has played in shaping/limiting women's options. Work by Hammami (2001), Olmsted (2001) and Al-Ali (2005) suggests that women's employment options have been shaped in rather unique ways in conflict ridden regions.

While various studies have been done that provide insights into the impact that changing government policies in MENA have or are likely to have on women's employment options, it is worth noting that female participation rates range considerably, with women in Tunisia, Morocco and Turkey having relatively high participation rates, and Palestinian and Iraqi women having some of the lowest rates of participation regionally (World Bank 2004a). In addition, in no country is the participation rate greater than 50 percent. Thus the majority of women remain outside the employment sector. Yet very little research focuses on what these women are doing with their time or how they are faring economically.

One development that may help to improve researchers' information about how women who are outside of paid employment are spending their

time is the collection of a time use data. So far though only Oman, Morocco and the Palestinian Territories have collected such data (United Nations nd). Even in cases where these data are available, they remain of limited use for a number of reasons. First, the surveys provide time use for only a single year and in the case of Morocco, do not even include male time use data, making comparisons between Moroccan men and women impossible. If such data were collected on a more regular basis, for a larger number of countries, then comparisons over time across countries could be done, adding to researchers' information about how various policies are affecting women's time use/constraints.

A previous CAWTAR report (2001) points out another concern that has received very little focus in the literature. The question of whether the poor are more likely to be suffering due to the removal of subsidies and price stabilization policies has not been examined in depth, and studies addressing whether these changes have been gendered remain even more limited. Adams and Page (2003) argue that historically poverty rates in Arab countries have been quite low relative to the level of development. Bush (2004), while somewhat skeptical of these findings, points out that if the Arab countries have indeed been successful in keeping poverty rates down, current liberalization policies are likely to undo this positive result. More detailed analysis is needed to examine how policy changes have affected poverty rates and patterns and whether this process is gendered.

Unfortunately, very little information is available about the gendering of poverty. Few countries provide poverty statistics broken down by the sex of the household head. Among those that do, recent patterns suggest that a feminization of poverty has not occurred (Olmsted 2005b), but such statistics may mask the unequal distribution of resources within households. Additionally, as also noted by Olmsted (2005b), statistics on female headship are extremely out of date in a number of countries and thus researchers and policy makers do not have a clear idea of how household formation patterns may have changed during the period of liberalization and what that might indicate in terms of women's economic vulnerability. Another question worth exploring is

whether there is a link between aging, gender and poverty, a pattern that has been found in other parts of the world, since women often marry older men, whom they tend to outlive (Olmsted 2005a).

This report provides insights into a number of questions raised in the literature including: 1. How changes in the size and structure of the government sector have affected women's employment options; 2. How differing trade regimes have and are likely to affect women's employment options. Clearly research in a number of other areas is also needed, before researchers and policy makers can make assertions about how women in MENA are faring. More and better data are needed to address the concerns raised by gender scholars, which range from whether the structure of households is changing and if this is likely to lead to poverty becoming more feminized in MENA, to questions about how changes in women's access to paid employment may be affecting household formation, as well as women's power within households. Are changes in policies leading to changes in gender role expectations and are these likely to be positive or negative for women? How is unpaid work affected by and effecting women's ability to participate in paid employment? Pieces of this puzzle are slowly falling into place, but plenty of additional work is left to be done.

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# II. Why Did Economic Liberalization Lead to Feminization of the Labor Force in Morocco and De-feminization in Egypt?

By Ragui Assaad

## Introduction

The international literature on economic liberalization and gender emphasizes the strong link between the labor market deregulation and informalization that accompany economic liberalization processes and labor force feminization (Standing 1989, 1999; Cerruti, 2000; Cagatay, Elson and Grown, 1995; Valodia, 2001). Official structural adjustment programs and unofficial, but typically state-supported, erosions of worker protection policies are associated with the absolute and relative growth of the female labor force in the developing world. According to the literature, the feminization trend has permeated all the regions of the developing world with the possible exception of the Middle East and North Africa (MENA), which has seen its share of women in the labor force stagnate over the liberalization period (Horton 1999). Within MENA, Morocco and Tunisia stand out as exceptions that conform to the feminization trend observed elsewhere in the developing world (Moghadam 1998). A number of arguments have been advanced to explain the low and stagnant female labor force participation rates in MENA, including the obvious argument that cultural and social norms hinder women's participation in paid work outside the home.

The purpose of this paper is to explain the different trajectories followed by Egypt and Morocco with regards to feminization of the labor force. While both have experienced significant informalization of their labor markets, Morocco has undergone noteworthy feminization of its work force, while Egypt (excepting the civil service) has largely de-feminized. Both Egypt and Morocco have embarked on stabilization and adjustment programs since the 1970s. Since then, employment opportunities in public service have been curtailed, although more so in the case of Morocco. Both countries share a similar cultural heritage, so that norms about gender roles, in general, and women's work, in particular, should be fairly similar in both contexts. Explanations for their divergent paths with regard to feminization need to be sought, in

my view, in the different economic conditions faced by each country.

Because the international literature makes an explicit connection between female paid employment and economic liberalization and structural adjustment, the focus in this paper is on that, rather than on employment as a whole. Moreover, because both countries have been attempting to constrain the growth their civil service in recent years, albeit with less success in Egypt than in Morocco, I focus on non-governmental wage employment, which includes employment in the private sector and in State-Owned Enterprises (SOEs). Since the start of liberalizing reforms in the 1970s, SOEs have gradually been given increasing autonomy in hiring, wage-setting, and in general operations, so that by the 1990s it increasingly makes sense to lump them with private enterprises, as the non-governmental sector, rather than with the civil service, as the public sector.

This paper will explore the different economic trajectories in the two countries in terms of the change of the sectoral composition of employment and how the female share in each sector changed over time. I will also explore the differences in institutional arrangements and macroeconomic conditions that encouraged feminization (or de-feminization) in each country, with particular examination of hypotheses concerning how the structure of foreign exchange revenues has affected household labor decisions and the demand for female labor.

## Source Data and Methodology

The empirical analysis that follows is based on two nationally representative household surveys in Egypt (LFSS 1988 and ELMS 1998) and two surveys in Morocco, the MLSS of 1990/1991 and LSMS of 1998/1999. The surveys collected similar information from both populations, ensuring comparable categories for analysis. Each requested extensive information concerning basic

demographics, employment status, occupation, economic activity, and institutional sector of employment. The Egyptian LFSS 1988 was conducted on a sample of 9,917 households; the ELMS 1998 was conducted on a sample of 4,816 households. The MLSS 1990/91 was conducted on a sample of 3,323 households and the Morocco 1998/1999 LSMS was conducted on a sample of 5,529 households.

The methodology I propose to use to analyze the feminization/de-feminization trend in the two countries is to disaggregate wage employment outside the government into nine job types that employ women disproportionately in either country, and an additional residual category for jobs where women are under-represented<sup>1</sup>. A job type is defined by a combination of occupation information (professional, white collar, blue collar) and industry information at the two-digit ISIC level (e.g. agriculture, textile and garment manufacturing, health and education services).

In conducting data analysis, I examine the share of female employment in each job type, the job type's share in overall employment (as well as the changes in each over time). Let  $f_i^t$  be the share of females in job type  $i$  at time  $t$  and  $w_i^t$  be the share of job type  $i$  in overall employment at time  $t$ , where  $t=0$  stands for the beginning of the period and  $t=1$  stands for the end of the period. The change in the female share of non-governmental wage employment can be decomposed into three components as follows:

$$\sum_{i=1}^N w_i^0 (f_i^1 - f_i^0)$$

1) The Feminization Effect:

which shows how the overall female share would have changed had we kept the share of each job type constant over time, but allowed the individual female shares to change as they did over the period

2) The Composition Effect:  $\sum_{i=1}^N f_i^0 (w_i^1 - w_i^0)$

which shows how the overall female share would have changed had we kept the individual female shares constant, but allowed the sectoral composition of the economy to shift as it did over the period

3) The Interaction effect:  $\sum (w_i^1 - w_i^0)(f_i^1 - f_i^0)$

which is the residual effect due to the interaction between the change in female share and composition over the period. The latter effect is expected to be a small fraction of the overall change in female share.

In each case, the individual elements within the summation provide the decomposition into feminization, composition, and interaction effects of each job type's contribution to the change in overall female share. This decomposition reveals the extent to which the observed trend in the overall female share is due to the feminization/de-feminization of existing disproportionately female jobs, or to changes in the composition of the economy toward or away from these sectors. It would also allow us to identify the specific sectors that are most important in explaining the overall trend.

## Structural Adjustment in Morocco and Egypt

Both Egypt and Morocco have embarked on liberalization and economic restructuring programs since the mid to late 1970s. Egypt began pursuing liberalization policies with its open door policies of the 1970's and, later, instituted stabilization and structural adjustment programs in response to the drop in oil prices in 1986 (Abdel-Khalek 2001). With aid from the World Bank and the IMF, Egypt commenced its most ambitious structural adjustment program in 1991 (the Economic Reform and Structural Adjustment Program, or ERSAP). Its goal included eliminating large, unsustainable fiscal and external imbalances, trade, exchange rate, and financial sector reforms aimed at liberalizing the economy, and an ambitious privatization program (Assaad and Arntz, forthcoming). Morocco embarked on similar programs in the 1980s, instituting a structural adjustment program intended to re-orient the economy to the production of tradable goods. The first phase emphasized cuts in fiscal expenditure and the institution of a flexible exchange rate; the second phase focused on trade liberalization and public sector reform. (Nsouli et. al. 1995).

<sup>1</sup> The methodology for creating the job types is discussed in an Appendix. In two of the separately identified job types, namely agriculture and blue collar workers in manufacturing other than food processing or textiles and garments, women are disproportionately represented in Egypt but not in Morocco. In all the remaining seven job types, women are disproportionately represented in both countries.

Since these programs began, employment opportunities in public service have been increasingly replaced by jobs in the private sector. Structural adjustment is expected to favor the production of tradables and, in particular, labor-intensive manufactured exports, such as textile & garments – industries that disproportionately hire women. Moreover, structural adjustment is said to result in feminization by generating pressures to cut costs in tradable goods sectors, leading to the substitution of cheap female labor for more expensive male labor (Standing 1989, 1999).

I argue in this paper that developments in Morocco conform to these predictions fairly well, but that they do not in Egypt. It appears that in Egypt, employment growth was more rapid in disproportionately male sectors, such as transportation, construction, utilities, and a variety of service industries, which are typically considered non-tradable. Moreover, there was no tendency toward the feminization of these male-dominated sectors in Egypt, while the disproportionately female sectors other than the civil service de-feminized. Conversely, structural adjustment led to a significant growth of textile and garment manufacturing in Morocco, which accounts for a significant portion of its feminization. I explore explanations for these contradictory trends in Egypt and Morocco in differences in the two countries' structure of foreign exchange earnings. While Morocco relied increasingly on the export of labor-intensive manufactured goods, Egypt became increasingly dependent on service exports, especially tourism.

## Data Analysis

We start by examining the overall pattern of employment growth in the periods under consideration in the two countries, including the evolution of the female share of employment. As seen in Table 1a and 1b, overall employment grew at 2.5 percent per annum (p.a.) in Egypt from 1988 to 1998, while it only grew at 1.7 percent p.a. in Morocco from 1990/91-1998/99. However, the difference can be more than explained by the difference in the growth of the government sector in the two countries. In Egypt, the government workforce continued to grow rapidly in the 1990s, at nearly double the rate of overall employment growth. In Morocco, on the other hand, government employment, which makes up a much smaller portion of total employment than in Egypt to start with, remained constant in absolute terms

over the period under consideration. In contrast to overall employment and governmental employment, non-governmental wage employment is growing two and a half times as fast in Morocco than in Egypt. Both countries experienced a decline in State-Owned-Enterprise employment, but private sector employment in Morocco has more than made up for the decline of what was a relatively small SOE sector there.

**Table 1a: Egypt Employment Growth by Sector, 1988, 1998**

	Share in total employment		Av Ann Growth	Female Share	
	1988	1998		1988	1998
Private Wage Work	23%	25%	3,2%	14%	10%
State Owned Entreprises	9%	5%	-2,6%	14%	12%
Non-governmental Wage Work	32%	30%	1,9%	14%	10%
Government	19%	24%	4,8%	29%	31%
Non-Wage Work	49%	46%	1,8%	51%	61%
Total	100%	100%	2,5%	35%	38%

Source: Author's calculations from LFSS 1988 and ELMS 1998

**Table 1b: Morocco Employment Growth by Sector, 1990/91, 1998/99**

	Share in total employment		Av Ann Growth	Female Share	
	1998/91	1998/99		1991	1999
Private Wage Work	24%	33%	5,7%	19%	23%
State Owned Entreprises	3%	2%	-3,3%	11%	11%
Non-governmental Wage Work	27%	35%	5,0%	18%	22%
Government	10%	9%	0,0%	20%	26%
Non-Wage Work	63%	57%	0,3%	41%	41%
Total	100%	100%	1,7%	33%	33%

Source: Author's calculations based on MLSS 1990/91 and MLSMS 1998/99

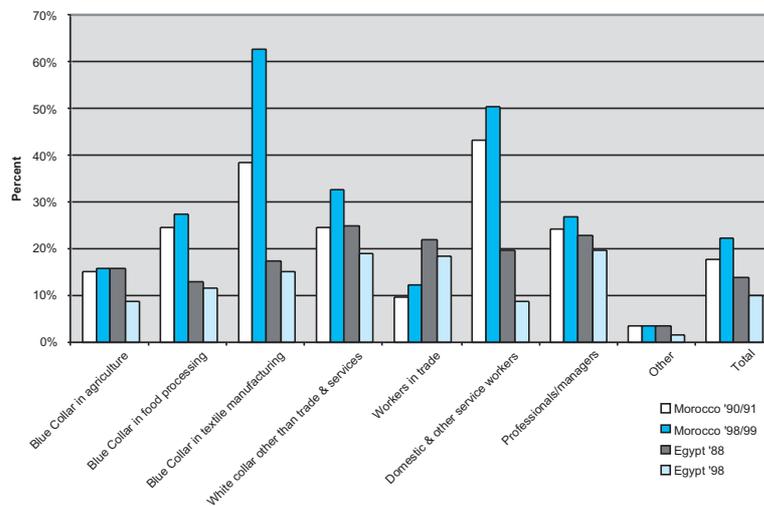
The proportion of females in overall employment has increased in both countries over the respective time periods, with Egypt's increasing from 35 to 38 percent, and Morocco's remained stable at 33 percent. Thus, at face value, women appear to be more or less equally represented in overall employment in Egypt and Morocco, and the share of women appears to be rising in Egypt but stable in Morocco. However, upon closer scrutiny, the relatively high female shares in Egypt and the rising trend there are entirely due to women's concentration in the large and still growing civil service. If we limit out

attention to wage employment outside of government, there is a striking difference between the two countries in both the share of female employment and its trend over time. The female share of non-governmental wage employment in Egypt declined from 14 to 10 percent, whereas that of Morocco increased from 18 to 24 percent. Moreover, this sector makes up a higher proportion of total employment in Morocco in 1998/99 than in Egypt in 1998 (35% vs. 30%) and is also growing faster in Morocco than in Egypt (5.0% p.a. vs. 1.9% p.a.).

Given the poor prospects for the growth of the government employment in both countries in the foreseeable future, Morocco's labor market appears to be poised for more rapid employment growth than Egypt's and is also much more open to women. In what follows, I propose that this observed difference in the dynamism of non-governmental employment in the two countries and the greater openness to women of Morocco's private sector results from the different ways in which the two economies participated in world trade post-liberalization. Morocco's pattern of insertion in world trade relied increasingly on labor-intensive manufactured exports, and, in particular, on the export of textiles and garments, whereas Egypt continued to rely on tourism, oil, and remittances as its main sources of foreign exchange revenues.

To establish this proposition, I undertake a decomposition of the change in the female share of non-governmental employment in each country to establish the contribution of various industries to overall feminization or de-feminization. As explained in the source data and methodology section and in the appendix, I subdivide non-governmental wage employment into eight job types; seven in which women are disproportionately represented in either country at either the beginning or end of the period, and a residual category that lumps together all male-dominated jobs. The female share in each of these job types, as well as the overall female share in both countries, at the beginning and end of the period, are shown in Figure 1.

**Figure 1: Female Share of Non-Governmental Wage Employment by Job Type, Egypt and Morocco**

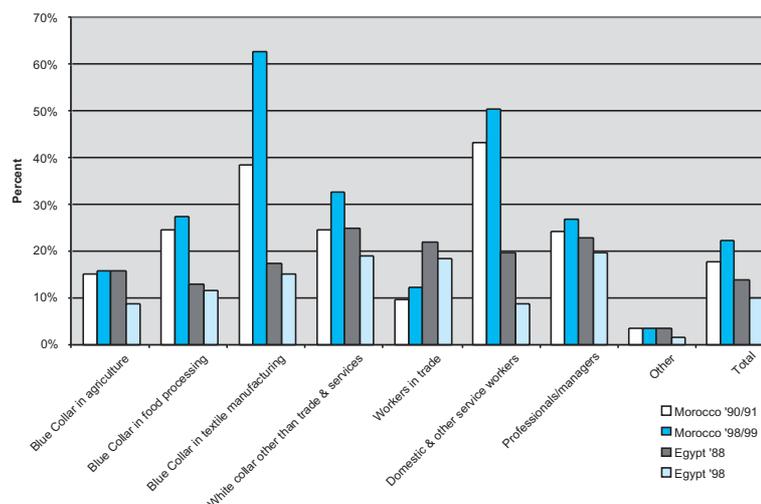


Source: Author's calculations from LFSS 1988 and ELMS 1998 (Egypt) and MLSS 1990/91 and MLSMS 1998/99 (Morocco)

As shown in Figure 1, the female share in Morocco has increased in nearly all job types, except for the residual category. Moreover, in all job types, except workers in trade, the Morocco has a higher female share than Egypt. In Egypt, there was de-feminization in all of the job types shown, including the residual male-dominated "other" category. This shows that women have lost "market share" across the board, including in jobs that were disproportionately female to start with.

The change in the overall female share is not only affected by changes in female shares in each job type, but also by the growth of each job type over time. Figure 2, shows the average annual growth rate of employment in each job type in Morocco and Egypt.

**Figure 2 : Female Share of Non-Governmental Wage Employment by Job Type, Egypt and Morocco**



Unlike the female share graph where the feminization pattern in Morocco and the de-feminization pattern in Egypt are fairly uniform across job types, the growth trends reveal a fairly mixed pattern. Employment in trade and services and in blue collar textile and garments manufacturing jobs grew more rapidly than overall employment in the non-governmental wage work in both countries, albeit the latter grew much more slowly in Egypt than in Morocco. Employment in agriculture and in white collar jobs outside trade and services grew more slowly than average in both countries. In general, however, there isn't an easily observed pattern of growth rates that would explain feminization/de-feminization in either country.

In what follows I decompose the change in the overall female share over the period under consideration—+4.5 percentage points in Morocco and -3.8 percentage points in Egypt—into the contribution of each job type to the change and further into a component due to the feminization of the job type (the feminization effect), a component due to the growth of the job type (the growth effect), and a residual interaction effect. The results of these decompositions are shown in Table 2a for Morocco and Table 2b for Egypt.

In Morocco, 87 percent of the change in female share is due to the feminization effect. In other words, had the sectoral composition of the Moroccan economy remained fixed, 87 percent of

the observed change in female share would have occurred. Similarly, in Egypt de-feminization accounted for 110 percent of the overall de-feminization. The change in the sectoral composition favored feminization, but was too small to counteract the de-feminization of the job types we identified. As mentioned earlier, all of the disproportionately female job types in Morocco were further feminized, but women did not make important inroads in male-dominated jobs as indicated by the low and slightly falling proportion of females in the “other” category. Two job types account for the bulk of feminization in Morocco. “Blue collar in textile and garment manufacturing” and “domestic and other service workers” together make up more than two-thirds of the Moroccan feminization effect. When growth is taken into account, these two job types account for 116 percent of the total change in female share in Morocco. In Egypt, all the job types listed in the table de-feminized, with the exception of the category “blue collar workers in food-processing industries”, which maintained a constant female share. The four job types that account for most of the de-feminization in Egypt are “blue collar in agriculture”, “white collar other than trade and services”, “domestic and other services” and “other”. In the case of “blue collar in agriculture”, “white collar other than trade and services” and “other” the negative feminization effect was reinforced by a negative growth effect. In the case of “domestic and other services” de-feminization was partially countered by a positive growth effect.<sup>2</sup>

<sup>2</sup> The “interaction effect” is a residual effect in the decomposition of each job type’s contribution to the change in overall female share into a “feminization” and a “growth” effect. It is usually small compared to the other two effects and results from the interaction between a change in female share and a change in the job type’s share of total non-agricultural wage employment.

**Table 2a Morocco: Decomposition of Change in Female Share of Non-Governmental Wage Employment, 1991, 1999**

	1990-91		1998-99		Total Effect	Feminization Effect	Growth Effect	Feminization Effect
	female share	share in overall employment	female share	share in overall employment				
Blue Collar in agriculture	15.2%	19.2%	15.7%	15.2%	-0.5%	0.1%	-0.6%	0.0%
Blue Collar in food processing	24.6%	4.1%	27.6%	2.7%	-0.3%	0.1%	-0.4%	0.0%
Blue Collar in textile manufacturing	38.7%	7.7%	62.7%	10.0%	3.3%	1.8%	0.9%	0.6%
White collar other than trade & services	24.6%	10.0%	32.6%	7.8%	0.1%	0.8%	-0.6%	-0.2%
Workers in trade	9.9%	3.0%	12.2%	6.6%	0.5%	0.1%	0.4%	0.1%
Domestic & other service workers	43.4%	11.6%	50.6%	13.7%	1.9%	0.8%	0.9%	0.2%
Professional/managerial	24.1%	7.7%	26.7%	4.8%	-0.6%	0.2%	-0.7%	-0.1%
Other	3.5%	36.8%	3.4%	39.1%	0.0%	-0.03%	0.1%	0.0%
Total	17.8%	100.0%	22.3%	100.0%	4.5%	3.9%	0.1%	0.5%

**Table 2b: Egypt: Decomposition of Change in Female Share of Non-Governmental Wage Employment, 1988, 1998**

	1988		1998		Total Effect	Feminization Effect	Growth Effect	Feminization Effect
	female share	share in overall employment	female share	share in overall employment				
Blue Collar in agriculture	15.9%	19.1%	8.7%	16.2%	-1.6%	-1.4%	-0.5%	0.2%
Blue Collar in food processing	13.0%	3.3%	11.7%	4.1%	0.1%	0.0%	0.1%	0.0%
Blue Collar in textile manufacturing	17.4%	5.9%	15.3%	5.9%	-0.1%	-0.1%	0.0%	0.0%
White collar other than trade & services	25.0%	8.7%	19.2%	7.7%	-0.7%	-0.5%	-0.3%	0.1%
Workers in trade	22.0%	7.5%	18.4%	9.8%	0.2%	-0.3%	0.5%	-0.1%
Domestic & other service workers	19.7%	7.1%	8.9%	9.1%	-0.6%	-0.8%	0.4%	-0.2%
Professional/managerial	22.9%	12.3%	19.7%	13.2%	-0.2%	-0.4%	0.2%	0.0%
Other	3.5%	36.1%	1.6%	34.0%	-0.7%	-0.7%	-0.1%	0.0%
Total	13.8%	100.0%	10.0%	100.0%	-3.8%	-4.2%	0.4%	0.0%

Source: Author's calculations.

To summarize, the results of the decomposition show that had Morocco not seen feminization and growth in production jobs in textile and garments manufacturing, nearly three quarters of the feminization that occurred in the Moroccan labor market would not have occurred. The female share in that sector increased from 39 percent in 1990/91 to 63 percent in 1998/99. The feminization and growth of domestic and other service jobs in Morocco accounted for the bulk of the rest of the feminization of non-governmental wage employment in Morocco. In contrast, Egypt experienced average growth in textiles and garment over the relevant period and some de-feminization in the sector. Although the domestic and other service workers sector grew more rapidly than average in Egypt, it de-feminized significantly. In both countries, women did not increase their share of male-dominated jobs, suggesting that the labor

market continues to be gender segregated in both contexts. The main exception is the increase in female share in trade-related jobs, which had been a male-dominated sector in Morocco.

In what follows I seek explanations of the divergent feminization trends in the way the two countries have been integrated in world trade following the structural adjustment period.

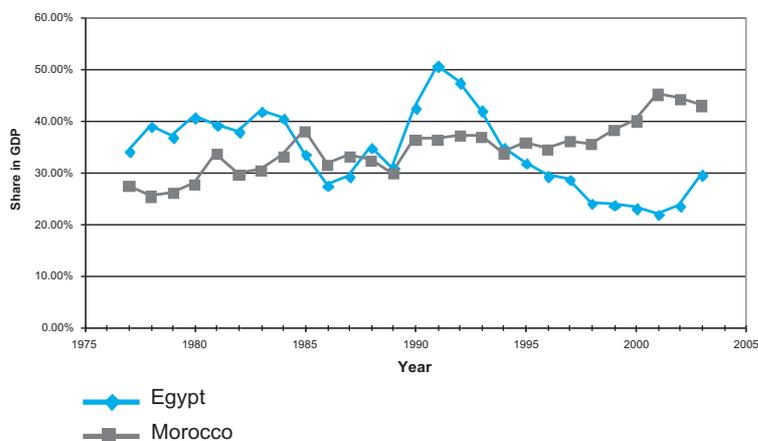
### An Analysis of Foreign Exchange Revenues in Morocco and Egypt

In the following sections, I explore hypotheses concerning the macroeconomic conditions that induced the economic shifts favoring de-feminization in Egypt and the opposite in Morocco. Specifically, I investigate the composition of foreign exchange earnings and their share in GDP,

and the effect of oil and oil related revenues on the economy. One hypothesis advanced in the literature is that the presence of substantial revenues from oil and remittances, which tend to flow to male members of the household, either directly or through government subsidies, reduce female labor supply by reinforcing the patriarchal household model of male bread-winner and female housewife (Moghadam 2001, Karshenas and Moghadam 2001). Another well-documented contention is that oil and remittance revenues, have a distorting effect on the exchange rate, causing the so-called “Dutch Disease” phenomenon whereby traditional tradable industries, such as agriculture and manufacturing contract, and non-tradables, such as construction, transportation, and services, expand. These hypotheses suggest that Egypt, which has relied much more on oil and remittance revenue than Morocco would be more affected by these two phenomena. Morocco, which relied more for its foreign exchange revenues on traditional export industries, such as textile and garment manufacturing, would conform more to the feminization trends observed elsewhere in the world post-liberalization.

In its post-liberalization period in the 1980s and 1990s, Morocco experienced a relatively steady increase in the share of foreign exchange earnings relative to GDP, which went from 27 percent in 1977 to 43 percent in 2003 (See Figure 3). In contrast, Egypt’s foreign exchange earnings have been more volatile overall, and have followed a generally declining trend relative to GDP since the late 1970s. There was an exceptional increase in the share of foreign exchange earnings to GDP in Egypt in the early 1990s as a result of the impact of the First Gulf War on foreign aid and on remittances, as Egyptian workers in Iraq and Kuwait repatriated their savings. This increase was fairly short-lived, however, and was followed by a return to the long-run declining trend. The downward trend in the share of foreign exchange earnings in GDP is not interrupted until 2002, a year in which a major devaluation of the Egyptian pound occurred. Thus, the

**Figure 3: Share of Foreign Exchange in GDP, Egypt and Morocco**

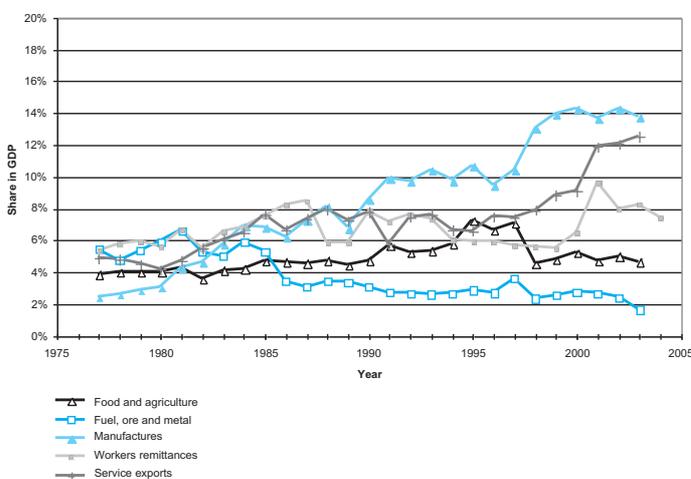


Source: Author’s calculations from World Bank World Development Indicators Online, October 30, 2005

Egyptian economy does not conform to the standard pattern of economies becoming more opening after the implementation of structural reforms. If anything, the share of foreign exchange revenues to GDP has declined steadily since the adoption of reforms in 1991.

An examination of the composition of foreign exchange revenues in both countries further supports the argument that Morocco has placed greater emphasis on manufactured exports than Egypt. As shown in Figure 4, in Morocco, manufactured exports have logged a steadily growing share of GDP going from 2 percent in 1977 to 14 percent in 2003. They currently constitute the largest source of foreign exchange earnings in Morocco, followed by service exports

**Figure 4: Morocco - Sources of Foreign Exchange Earnings as a Share of GDP, 1977- 2003**



Source: Author’s calculations from World Bank World Development Indicators Online, October 30, 2005

## II. Why Did Economic Liberalization Lead to Feminization of the Labor Force in Morocco and De-feminization in Egypt?

By Ragui Assaad

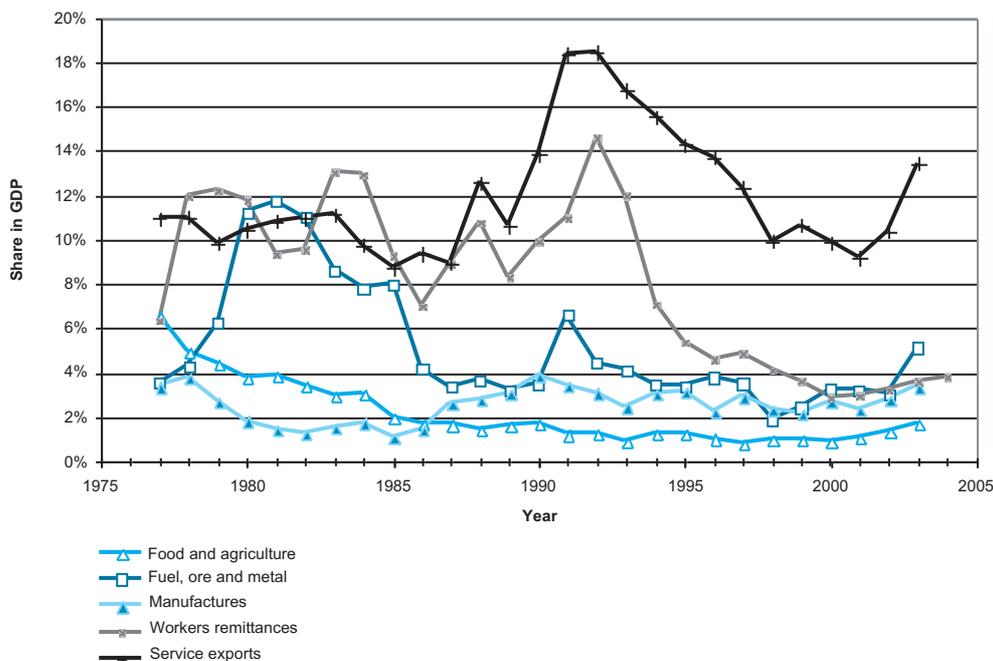
(mostly tourism), which have grown rapidly in the 1990s. Manufactured exports have been the only component of foreign exchange earnings in Morocco to increase steadily over time as a share of GDP. The declining importance of phosphates in Morocco's exports is indicated by the steadily declining share of "fuels, ores, and metals."

In contrast, Egypt's manufactured exports make up a relatively small part of its foreign exchange revenues. As seen in Figure 5, Egypt's foreign exchange revenues are derived primarily from services, almost half of which consist of international tourism. Service exports have increased significantly as a share of GDP in the second half of the 1980s only to decline steadily during the 1990s. They recovered somewhat since the 2002 devaluation of the pound. Workers' remittances, though far behind services, was the second largest source of foreign exchange earnings through the 1990s, but they also experienced a precipitous decline since their peak in 1991. Manufactured exports, which fluctuated between 2-4 percent of GDP since the mid 1980s, were at the low end of this range in 1998, the end year of our study interval, but recovered to about 3.5% by 2003.

Oil exports, which are included in "fuel, ore, and metal" were still an important source of foreign exchange revenues for Egypt by the end of the 1990s despite declining significantly from a high of 12 percent of GDP in 1981.

Oil and oil-related revenues, such as worker remittances (in Egypt's case), are argued to reduce female labor force participation by reducing female labor supply. By accruing to male household members, they reduce labor supply by reinforcing a "patriarchal gender contract", where men are the primary wage-earners and women assume the role of homemakers (Moghadam 2001, Karshenas and Moghadam 2001). Since migrants to oil-rich countries, which are the majority of migrants from Egypt, are almost universally male, remittance revenues, according to this argument, give households the "luxury" of keeping "their women-folk" at home (Karshenas and Moghadam 2001). The higher income levels associated with the oil sector are believed to make it unnecessary for families to have more than one wage-earner. This ostensibly raises women's reservation wage at a point in time when most employment offered to females are significantly low-paying jobs. This is construed as a

**Figure 5: Egypt - Sources of Foreign Exchange Earnings as a share of GDP, 1977-2003**



Source: Author's calculations from World Bank World Development Indicators Online, October 30 2005.

constraint on the supply of women's labor and an explanation for the lower female participation rates in Egypt. Proponents of this theory would argue that Morocco has not experienced a similar supply constraint because of its economic emphasis on exportable goods instead of mining or oil-related industries<sup>3</sup>.

I argue that the effect of oil and oil-related revenues on the structure of labor demand provides an even more compelling explanation of feminization/de-feminization of the labor force than the supply side argument outlined above. In accordance with the Dutch Disease phenomenon, rent-based external revenues (such as oil revenues and remittances in Egypt), through their effect on the real exchange rate, harm the labor-intensive export-oriented sectors, which tend to favor women workers, by making them less competitive internationally. Oil and remittances may therefore be far more limiting on the demand for female labor in Egypt than constraining on female labor supply.

Although oil and remittances are a smaller share of foreign exchange revenues than they were in the 1980s, they were essentially replaced by service exports rather than manufactured exports. Service exports in Egypt are made up for the most part of tourism and Suez Canal tolls. For a variety of reasons having to do with the location of many of Egypt's tourist attractions in remote and lightly populated areas, tourism in Egypt is an industry that is heavily male-dominated. This is even true of jobs that are usually heavily feminized in other settings, like housekeeping jobs. According to the LFSS 88 and ELMS 1998 data, employment in restaurants and hotels, which is the most important constituent of the tourism industry, was only 6.4 percent female in 1988 and dropped to 3.4 percent female in 1998. Transportation, another important constituent of tourism, was 6.1 percent female in 1988 and dropped to 3.3 percent female by 1998. Thus Egypt's mode of incorporation into the international economy in the 1990s did not spur significant demand for female labor.

Morocco's focus on labor-intensive manufactured exports and its increasingly more limited reliance on mining revenues, has led to a liberalization experience that was a spur to greater female employment. As I showed above, the bulk of Morocco's feminization is due to the growth and feminization of the textile and garment manufacturing sector, a sector that supplied most of

Morocco's manufactured exports. The second largest contribution to Morocco's feminization was the service sector. Service exports, mostly tourism, were also the second largest contributors to Morocco's foreign exchange earnings in the 1990s. Like in Egypt, the restaurant and hotels sector in Morocco was male-dominated in 1990/91, with only a 7.4 percent female share. However, by 1999, its female share had soared to 23 percent. The Moroccan transportation sector continued to be male-dominated in both years. Thus Morocco's mode of incorporation into the world economy in the 1990s, whether through manufactured exports or tourism, spurred employment in sectors that were undergoing significant feminization.

## Conclusion

I argued in this paper that the mode in which Morocco and Egypt were integrated in the world economy after they adopted economic liberalization and structural adjustment programs determined the opportunity structure facing women in the labor market outside the government sector. Although Egypt's labor market had actually feminized in the 1990s, most of that feminization occurred as a result of the rapid growth of the government sector, which hired women disproportionately. During a similar time period, the Moroccan labor market as a whole maintained a constant female share. I argue however, that the employment prospects for women are much brighter in Morocco than in Egypt, because of what is happening outside the government sector, where most employment growth is likely to occur in the foreseeable future. Not only does non-governmental wage employment in Morocco have a higher female share than in Egypt, it is also feminizing significantly over time as compared to Egypt's which is de-feminizing. Although these opposite trends cut across all job types in both Morocco and Egypt, two disproportionately female job types in Morocco, namely blue collar work in textile and garments manufacturing and domestic and other service work, explain virtually all the feminization that occurred in Morocco. In contrast, the textiles and garments and service sectors in Egypt contributed to the de-feminization that occurred there. I relate these contrasting trends to the main mode of earning foreign exchange in the two countries since the mid 1970s. Morocco became less and less reliant on phosphates exports and more reliant on manufactured exports and tourism revenues; two industries that feminized significantly over time in

<sup>3</sup> One can further argue that Moroccan migration, which is mostly to Western Europe, is more gender-balanced than migration to the oil-rich countries of the Gulf. Remittances in Morocco do not accrue exclusively to male household members.

Morocco. Egypt, on the other hand, continued to rely on oil and remittances as major sources of foreign exchange. Although, tourism and other service exports took over from oil and remittances as the main sources of foreign exchange earnings in Egypt in the 1990s, employment in these industries became less rather than more feminized during this period. Despite economic liberalization and structural adjustment, the contribution of manufactured exports to Egypt's foreign exchange earnings continued to be quite limited in the 1990s.

I do not wish to suggest that the mode of incorporation into the world economy and its effect on labor demand is the only reason for the contrasting trends in Egypt and Morocco. In other work, I explored the role of women's constrained geographical mobility in Egypt during the structural adjustment period that prevented from taking advantage of employment opportunities that demanded increasing commuting on the part of men (See Assaad and Arntz 2005). Because of their need for female labor, Moroccan employers in the textiles and garments industry may have been more willing to provide transportation to work and thus alleviating this constraint (Cairolì 1998). It also appears that employment in domestic services was becoming less socially acceptable over time in Egypt, but that it was increasing in Morocco. Even if this is true, this can only explain a small part of the difference in feminization trends in the two countries. The bulk of the difference can be accounted for by the different trajectories of the textile and garments and service sectors in the two countries, both of which have been strongly affected by the way each country was incorporated in world trade.

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## Appendix : Typology Formation

The job types used for this analysis were determined by combining economic occupation and activity variables into nine jobs types that capture the jobs where women are disproportionately represented. Occupations were divided into three categories: blue collar workers, white collar workers, and professional/managerial workers. Economic activities were initially subdivided into the following categories: (i) agriculture, fishing, mining, (ii) food and beverage manufacturing/processing, (iii) textile, garments, and shoe manufacturing, (iv) manufacturing other than textiles and garments and food processing, (v) utilities, (vi) construction, (vii) retail and wholesale trade and repair, (viii) restaurants and hotels, (ix) transportation, (x) finance & insurance, real estate & business services, (xi) administration, (xii) education, (xiii) health, (xiv) personal, community & social services, (xv) domestic services, and (xvi) undeclared. These occupation and economic activity categories were combined to form nine types of jobs as shown in Table A1 below.

**Table A1: Job Typology for Analysis of Feminization/Defeminization in Egypt and Morocco**

Job Type	Occupation	Economic Activity
1- Blue collar in agriculture	Blue collar	Agriculture
2- Blue collar in Food Processing	Blue collar	Food & Beverage Processing
3- Blue collar in Textile Manufacturing	Blue collar	Textile, garment & Shoe Mfg.
4- Blue collar in Other Manufacturing	Blue collar	Manufacturing other than textile & garments and food processing
5- White Collar other than Trade and Services	White Collar	Anything outside trade, restaurants and hotels, personal/community/social services and domestic services
6- BC and WC workers in Trade	White and blue collar	Retail and wholesale trade and repair
7- Domestic and other service workers	White and blue collar	Hotels and restaurants, personal/community/social services, domestic services
8- Professionals and managers	Professional/managerial	All activities, including education and health, etc.
9- Other	All other occupation/activity cells not previously mentioned	

# III- Libéralisation commerciale et dynamique de l'emploi féminin : Le cas de la Tunisie

De Moncef Ben Slama

L'engagement des pays de la région MENA dans un processus de libéralisation et d'intégration dans l'économie mondiale est sous-tendu par l'adoption d'une stratégie de croissance mue par les ressorts du marché et orientée vers l'extérieur. Cette stratégie devrait aider les pays MENA à accélérer le rythme de création d'emplois. En fait, la région n'offre pas d'opportunités d'emploi suffisantes au regard des pressions sur le marché du travail, le taux de chômage dans cette région étant en effet un des plus élevés dans le monde. De plus, les exportations de la région MENA sont concentrées dans des produits à faible valeur ajoutée, le prototype étant les Textiles.

L'ouverture économique - adhésion à l'OMC, accords de libre-échange avec l'UE, démantèlement de l'Accord Multifibres AMF - autorise de nouvelles opportunités d'expansion, mais fait peser aussi des hypothèques sur la croissance et l'emploi en raison des risques inhérents à la concurrence étrangère et des restructurations engendrées par la mise en œuvre de la politique de démantèlement tarifaire.

La Tunisie s'est résolument engagée dès le milieu des années 80 dans un processus de libéralisation et d'ouverture sur les marchés extérieurs, et pour ce faire il fallait :

- développer l'initiative privée au moyen d'incitations, souvent ciblées sur les entreprises à vocation exportatrice, d'où l'orientation des firmes non résidentes vers certains segments d'exportation labour-using à dominante féminine et à faible intensité technologique (cas des Textiles).
- accélérer les privatisations considérées comme un important vecteur d'opportunités d'exportation, de transfert de technologie et d'innovations managériales, par delà les coûts sociaux - compressions d'effectifs - qu'elles engendrent dans un premier temps.
- éliminer toutes restrictions au commerce international, pour accroître les chances de tirer profit des rendements d'échelles et stimuler la compétitivité à l'exportation.

A cet égard, on doit noter que l'exécution de l'accord sur la zone de libre-échange entre la Tunisie et l'UE atteint désormais l'étape critique de l'extension du démantèlement aux produits concurrentiels des produits fabriqués localement. De fait l'intensification de la concurrence, tant sur le marché national qu'à l'exportation, s'est traduite par des restructurations d'entreprises et donc des tensions sur le marché du travail.

Dans ce contexte, les Femmes peuvent subir, dans la phase d'accélération de la libéralisation, de façon "discriminatoire" par rapport aux Hommes, les effets de la dérégulation des marchés de travail, cela d'autant plus que l'ouverture commerciale des PVD favorise souvent la spécialisation dans des activités recourant à une main d'œuvre de qualification limitée et de statut précaire. L'engagement des Femmes dans la vie économique - offre de travail, entrepreneuriat - est en fait conditionné par leurs capacités d'accès à l'éducation, aux formations qualifiantes et au crédit mais aussi par leur propension à la mobilité spatiale et sectorielle (voir S.Joekes et A.Weston, 1994).

De ce point de vue, on doit relever que la féminisation de certains segments manufacturiers d'exportation à faible qualification (Textiles à titre principal), caractérise souvent les premiers stades de l'ouverture commerciale. Il faut considérer, en outre, qu'avec l'accélération des démantèlements tarifaires, une part importante du facteur travail devra "migrer" de certaines activités en régression vers d'autres activités plus compétitives. A la nécessité d'une plus grande mobilité professionnelle s'ajoute alors l'obligation d'acquérir voire de renouveler les compétences requises pour faire face à la concurrence internationale. Les Femmes sont particulièrement exposées à ces risques dans les activités où leur taux de participation est élevé.

Par ailleurs, la tendance à la compression relative des taux de salaire, inhérente à la première phase de l'ouverture, va de pair avec l'extension des formes de flexibilité du travail, de la sous-traitance de certains segments de la chaîne de production et de l'emploi informel et à domicile. A partir de là, il convient de procéder à l'étude de la dynamique de l'emploi féminin en focalisant sur les secteurs exposés.

L'aptitude des Femmes à tirer profit de la mondialisation est conditionnée par leur capacité d'accès aux ressources productives - matérielles et capital humain - en vue de participer à la création économique et de procéder à la diversification de leurs activités. Dans ce processus de mondialisation, les cycles de création/destruction d'emplois sont appelés à s'accélérer. Les Femmes sont exposées davantage que les Hommes aux contraintes de l'ouverture voire à la marginalisation. De plus les risques qui s'annoncent pour les prochaines années semblent être plus grands, d'où les servitudes de la mise à niveau et de l'adaptation.

En fait, en mettant l'accent sur la problématique du genre féminin dans ce processus d'ouverture, deux objectifs spécifiques sont recherchés :

- l'évaluation de l'impact genre en termes d'emploi et de conditions de travail.
- l'identification de normes de politiques de régulation.

Pour ce faire on se propose d'envisager les aspects suivants :

1. Les déterminants démographiques et éducatifs de l'offre de travail féminin.
2. Les caractéristiques globales et sectorielles du marché du travail féminin.
3. Les multiplicateurs d'emploi féminin à l'épreuve de l'ouverture.
4. Entrepreneurat féminin : vers de nouvelles orientations ?

## 1. Les déterminants démographiques et éducatifs de l'offre de travail féminin

### a. Transition Démographique : tendances du genre

L'évolution de la population féminine aura été plus rapide que celle de la population masculine. Sur la période 1984 - 2001, on peut relever les tendances suivantes :

#### Mobilité spatiale de la population par genre

Les flux migratoires féminins s'intensifient et s'orientent principalement vers l'Est (régions du Littoral), et plus particulièrement le Grand Tunis. La participation féminine à la migration vers l'Est

s'accroît tout particulièrement pour les entrants d'âge actif, concernés par le marché du travail. Dans ces régions de l'Est, l'attrait de Tunis est relativement plus sensible pour les Femmes que pour les Hommes.

L'évolution des soldes migratoires, dont la moyenne annuelle de période progresse plus vite pour les Femmes que pour les Hommes, est de nature à aggraver le dualisme régional prévalent en Tunisie, à l'instar d'autres pays méditerranéens. De ce point de vue, on doit retenir que le sens des mouvements migratoires féminins pourrait accentuer le déséquilibre spatial de la croissance dès lors que:

- L'afflux, assez fort, des migrantes de la tranche d'âge 15-24 ans, pour des motivations de scolarisation secondaire et supérieure, s'opère en quelque sorte au détriment des zones de départ en termes d'accumulation potentielle de capital humain.
- La progression, bien perceptible, des migrantes de la tranche d'âge 25-59 ans, confrontées aux pressions sur le marché du travail, et donc attirées par les zones urbaines industrialisées - en particulier Textiles et industries de montage - est redevable en partie au déséquilibre inter-régional de localisation des créations d'activités. Elle témoigne ainsi, pour les Femmes, d'une forte propension à la mobilité professionnelle notamment dans les métiers de l'éducation et de la santé, au delà des motivations de mobilité pour des motifs de regroupement familial.

Par ailleurs, il importe de souligner qu'à la faveur de ces flux migratoires, une "redistribution" inter-régionale des potentialités éducatives s'est opérée; ce processus de réallocation aura été favorable pour les régions de l'Est du pays de par la dotation éducative des migrants reçus, alors que cette même dotation éducative est moins valorisante pour les entrants dans les régions de l'Ouest.

#### Prospective démographique par genre

Selon les projections de l'INS à l'horizon 2029 d'importantes mutations démographiques par genre sont attendues sur la longue période :

- L'Espérance de vie à la naissance des Femmes aura tendance à augmenter, d'où les pressions liées aux coûts sociaux inhérents à l'accentuation attendue du vieillissement.

- Accroissement attendu de la pression sur le marché du travail, avivée par l'orientation dans le sens de la hausse du taux d'activité féminin; la décélération de cette pression ne sera sensible qu'au cours des années 2020.

- Le déséquilibre de la répartition spatiale de la population aura tendance à s'aggraver, induit en partie par une mobilité féminine bien sensible. Le processus de déstructuration spatiale est appelé à s'intensifier : le problème de la répartition régionale des activités économiques se pose toujours avec acuité, y compris dans les activités à forte concentration féminine (éducation, santé, industries manufacturières).

### b. Valorisation des Ressources Humaines Feminiennes

La progression de la scolarisation des Filles est constante. La tendance à la féminisation des effectifs en Tunisie s'apparente, en termes d'orientation, à celle constatée dans les Pays Développés et les Pays en Transition. Elle est, par contre, plus nette que celle de la moyenne des Etats Arabes, où l'écart de scolarisation entre les Garçons et les Filles reste sensible, au détriment de ces dernières (Rapport sur le Développement Humain en Tunisie RDHT 2001, PNUD 2002).

**Dans l'Ecole de Base EB**, la tendance est à la résorption des déperditions au 1<sup>o</sup> cycle. Il ressort clairement que, s'agissant des paramètres d'évaluation du rendement interne, l'écart entre Filles et Garçons, toujours à l'avantage des premières, tend à se creuser de façon perceptible. Pour le rendement interne du 2<sup>o</sup> cycle de l'EB, en net « décrochage » par rapport à celui du 1<sup>o</sup> cycle de l'EB, l'écart est, ici aussi, à l'avantage des Filles par rapport aux Garçons.

On doit constater, par ailleurs, en considérant les taux de réussite à l'examen final de l'EB, en amélioration continue, que les Filles ont tendance à accroître leur avantage sur les Garçons.

**L'amélioration du rendement interne dans le cycle secondaire est sensible:** La part relative des Filles dans le total des admis au Baccalauréat, en accroissement rapide, est devenue majoritaire (54% en juin 1999 et 58% en juin 2002).

La «féminisation» des bacheliers étant désormais patente et croissante, on pourrait y déceler un indice probant d'une accentuation, pour

les années à venir, du déséquilibre par sexe de la structure des effectifs de l'enseignement supérieur, non conforme au poids démographique relatif des deux sexes ; autant dire une tendance préjudiciable à la « sous - scolarisation » supérieure des Garçons.

**En ce qui concerne l'Enseignement Supérieur ES**, on doit observer que l'orientation dans le sens de la libéralisation et de l'extraversion de la croissance est tributaire d'une contribution soutenue de l'université tunisienne à l'effort d'accumulation des intrants humains pour faire face aux normes de compétitivité requises sur les marchés extérieurs. Ce double processus de Libéralisation/Ouverture, qui se poursuit en Tunisie, aura été concomitant avec un rattrapage spectaculaire et significatif du genre féminin en matière de scolarisation supérieure, alors même que des signes de "déclassement" relatif en la matière sont de plus en plus perceptibles pour les Garçons.

Le taux de scolarisation supérieure des Filles a été multiplié par plus de quatre en douze ans, dépassant à partir de 1998/99 et de plus en plus, celui des Garçons. Ce qui a permis de pallier la sous - accumulation en "intrants d'enseignement supérieur" qui prévalait lors du démarrage du processus de Libéralisation /Ouverture. Désormais le taux tunisien, notamment celui des Filles, se situe bien au delà de la moyenne des PVD et dépasse la moyenne mondiale ainsi que la norme des Etats Arabes.

Par delà le triplement des effectifs scolarisés dans l'ES au cours de cette période, il importe notamment de relever une tendance bien sensible à la « féminisation » rampante des effectifs: la part relative des Filles atteint désormais 56 % en 2003/04 contre 39.4% en 1990/91. Cette féminisation est actuellement prononcée dans les universités à prédominance «Littérature et Sciences Humaines».

La tendance à la progression des Filles est nette dans tous les secteurs de formation supérieure. Mais on observe, par ailleurs, un rattrapage régulier et sensible dans les filières scientifiques, secteurs où la part relative des Filles est encore "minoritaire".

L'évolution rapide du nombre de Filles diplômées est bien conforme à la "féminisation" de l'ES relevée supra ; elle devrait induire de profondes mutations par genre et par structure dans le marché du travail.

**Sur la longue période, le taux d'analphabétisme (10 ans et plus) a régressé** de façon nette, passant de 85% en 1956 à moins de 23% actuellement. Le rythme « d'amélioration » aura été cependant plus sensible pour les Hommes que pour les Femmes, d'où la persistance d'un décalage assez perceptible entre les deux sexes. La résorption significative de cet écart, corollaire des progrès de l'éducation, exige des time - lags, avant l'arrivée des jeunes cohortes féminines "intensément éduquées" à des âges plus avancés.

S'agissant tout particulièrement des progrès de l'alphabétisation féminine, La norme tunisienne est bien "meilleure", il est vrai, que celle de la moyenne des Etats Arabes mais elle reste en deçà de la moyenne des PVD, l'écart avec les régions émergentes (Amérique Latine, Asie de l'Est) étant très grand, notamment en ce qui concerne la tranche d'âge sensible des 15-24 ans.

**• Sur la base de ce constat, une double régulation s'impose:**

- Pour accroître les chances des Filles d'intégrer les activités porteuses du processus de Libéralisation/ Ouverture, il est opportun de favoriser un mouvement de réallocation sectorielle de l'effectif des Filles dans le sens d'une moindre concentration dans les filières littéraires, non adaptées à la structure de la demande de travail, et d'une accélération du "rattrapage" dans les filières scientifiques en focalisant sur les Sciences de l'Ingénieur et les NTIC, pour éviter une fracture numérique entre les deux genres qui aurait un impact différencié sur leur degré de compétitivité.

- L'éradication de l'analphabétisme féminin demande à être consolidée par un recours intensif aux moyens audio visuels pour prévenir les rechutes en analphabétisme des sortantes du programme national d'éducation des adultes PNEA et par l'orientation des programmes du PNEA dans un sens qui renforce l'employabilité et les aptitudes à l'adaptation. Des programmes spécifiques en entreprises à l'intention des ouvrières analphabètes du secteur exportateur, dont certains intra - horaires de travail, devraient être favorisés.

## 2. Les caractéristiques du marché du travail féminin

### a. Caractéristiques Globales

La participation des Femmes au marché du travail s'accroît de façon très nette.

Les résultats du recensement de la population de 2004 révèlent que le taux de croissance annuel moyen des actifs employés (15 ans et plus) pour la période 1994 - 2004 aura été de 3.21% pour les Femmes contre 1.74% pour les Hommes.

Cette évolution est couplée avec une tendance très nette à la hausse du taux de participation des femmes pour tous les groupes d'âge. Il faut dire que l'aspiration des Femmes à une carrière professionnelle « valorisante » est d'autant plus sensible que la proportion de femmes qui occupent des emplois fonctionnels est passée de 6% en 1984 à 15% en 2000 (ministère de la femme, voir R. Zghal, CREDIF, 2005).

Parallèlement, le taux de chômage de Femmes décroît mais reste sensiblement supérieur à celui des Hommes :

**Tab.1 Taux de chômage en % - Recensement de 2004**

	1994	2004
Hommes	15,0	12,9
Femmes	17,2	16,9
Total	15,6	13,9

Si la tendance est à la forte diminution du chômage des femmes peu instruites, le chômage des sortants de l'ES, tend à augmenter, plus sensiblement pour les Filles que pour les Garçons.

**Tab.2 Taux de chômage de la population active du niveau du Supérieur en %**

	1994	1999	2003
Hommes	3,3	7,2	10,5
Femmes	5,1	11,7	17,3
Total	3,5	8,7	12,7

Cette augmentation du taux de chômage de la population féminine du niveau du supérieur, plus forte que celle des Hommes, est redevable, en partie, à la forte représentation des étudiantes dans les filières littéraires et sociales, qui connaissent de grandes difficultés d'insertion de leurs diplômés dans le marché du travail. Il faut aussi considérer que les entreprises ont tendance à absorber davantage de main d'œuvre moyennement ou peu qualifiée (souvent féminine) au détriment des sortants de l'ES, « plus coûteux ».

Par ailleurs, la Banque Mondiale (2003) estime que la durée moyenne du chômage en Tunisie est supérieure à une année ; le CREDIF (2002), de son côté, relève que les femmes sont sur-représentées parmi les chômeurs de longue durée. S'agissant des discriminations salariales, le CREDIF (2002) estime que les salaires des femmes tunisiennes sont en moyenne inférieurs à ceux des hommes, de 15% en 1999.

En fait le différentiel de salaires entre Hommes et Femmes en Tunisie se positionnerait sur des niveaux comparables à ceux des pays de l'OCDE (voir PNUD, 2003).

### b. Caractéristiques Sectorielles

Les mutations sectorielles de croissance tout au long des dernières décennies ont été marquées par l'émergence des services et de certaines activités industrielles en contre partie du reflux relatif des activités primaires, notamment agricoles.

Dans ce cadre, on relève notamment que l'emploi féminin tend à se substituer à l'emploi masculin dans l'Agriculture et à s'orienter vers certaines activités d'exportation exposées à la concurrence internationale - textiles, IAA, industries des composants - à la faveur de l'accélération de la libéralisation commerciale.

On se propose dans ce qui suit d'étudier ces mutations sectorielles de l'emploi féminin en focalisant sur les secteurs non agricoles.

En considérant les moyennes annuelles de création d'emploi par genre, de la période 1984-94 correspondant à la mise en œuvre de la politique de Libéralisation/Ouverture à la période 1994- 2001 relative à la maturation de ce processus, il ressort clairement du tableau ci-après que la progression des créations d'emploi féminin s'est intensifiée, comparativement à celle des Hommes.

**Tab.3 Créations d'emplois par secteur et par genre en milliers 1984 - 2001**

	moyenne annuelle 1984-94			moyenne annuelle 1994-01		
	H	F	F/H+F en %	H	F	F/H+F en %
IME*	1.2	0.6	33	2,5	1,9	43
THC*	1.6	1.3	45	1,6	3,4	68
Autres Industries	9.8	1.0	9	8,6	1,3	1,3
Enseignement, Santé et Administration	6.4	5.9	48	6,3	3,3	34
Autres Services	19.4	4.9	20	18,4	4,7	20

\*IME : Industries Mécaniques et Electriques

\*THC : Textiles, Habillement Et Cuir

Du point de vue des créations additionnelles d'emploi, les Femmes sont désormais nettement majoritaires dans les THC et investissent de plus en plus les IME. Toutefois la participation des Femmes dans les autres secteurs reste encore limitée, s'agissant notamment du secteur privé des services.

Sur cette base, on doit faire ressortir, au delà de la progression des créations d'emplois, l'effet des paramètres significatifs qui ont présidé aux mutations sectorielles de l'emploi féminin au cours cette phase de libéralisation du système économique.

1- Ces créations additionnelles d'emplois, réalisées lors de la période test de la Libéralisation/Ouverture 1989-01, ont été en fait concomitantes avec une évolution très sensible de la structure par âge de l'emploi, bien plus marquée chez les Femmes que chez les Hommes.

**Tab.4 Structure par âge de l'emploi par secteur et par genre - 1989 et 2001 en %**

	Emploi Total		THC		Enseignement/ Santé/ Administration	
Années	89	01	89	01	89	01
Femmes						
15-29 ans	55	44	69	65	43	23
30-59 ans	42	53	28	34	56	76
60 ans et +	3	3	3	1	1	1
Hommes						
15-29 ans	36	29	39	49	26	17
30-59 ans	57	64	59	49	70	81
60 ans et +	7	7	2	2	4	2

Il ressort une tendance à la baisse de la part relative des emplois assurés par la tranche jeune des 15-29 ans, plus accélérée pour les Femmes que pour les Hommes, par suite notamment de effets de la rétention scolaire et universitaire, de l'intensification des programmes de formation professionnelle et de la pression du chômage. Toutefois, l'implication des Femmes dans la vie active aux âges les plus jeunes est toujours sensiblement plus marquée que celle des Hommes.

En contre partie de cette évolution structurelle, le poids relatif de l'ensemble de la tranche d'âge des 30-59 ans, moins important pour les Femmes que pour les Hommes, s'est accru selon un rythme plus rapide pour ces premières que pour les actifs masculins.

S'agissant tout particulièrement des mutations structurelles par âge dans les secteurs de "prédilection" de l'emploi féminin, il importe de relever que:

- Les THC mobilisent encore pour l'essentiel - près des 2/3 en 2001 - des femmes jeunes de 15 à 29 ans, et souvent célibataires, contre 44% pour l'ensemble de la population active féminine en 2001. Il faut dire que, depuis l'accélération de l'extraversion, ce "déséquilibre" de structure, entretenu dans une certaine mesure par les pratiques de flexibilité de l'emploi, n'a pas été réduit significativement pour les Filles, alors qu'un équilibre des tranches d'âge régit encore l'emploi des Hommes. De fait près d'une jeune femme sur deux de l'ensemble de la tranche d'âge féminine 15 - 29 ans est mobilisée dans les THC, activités à faibles taux de valeur ajoutée et à faibles qualifications.

- Les activités d'Enseignement/ Santé/ Administration connaissent un reflux net de la part relative des jeunes, Filles et Garçons, "au profit" des actifs de 30 à 59 ans qui couvrent désormais près des 4/5 des emplois dans ce secteur ; cette évolution est assez conforme à l'allongement de la durée des études et des formations requises pour l'accès à ces emplois, outre les servitudes d'accès au marché du travail pour les diplômés de l'enseignement supérieur.

A cet égard, on doit relever, en considérant tout particulièrement la question de l'accès à l'emploi pour les diplômés de l'enseignement supérieur, par référence à la tranche d'âge pertinente 25-29 ans, qu'à ce stade du processus de la libéralisation économique, les Filles n'occupent en 2001 que 30% des emplois totaux couverts par ce segment de la population active, soit une proportion non conforme à leur rapide progression en matière d'éducation et de formation.

De plus ces emplois féminins restent encore faiblement diversifiés par rapport à ceux occupés par les Garçons, et se concentrent pour plus de la moitié dans des activités de faible intensité technologique (THC).

2- Outre ces mutations structurelles, il convient de souligner que l'évolution des flux d'emploi créés lors de la période 1989-01 a eu un impact significatif, assez différencié par genre, sur la répartition spatiale des emplois.

a/ Le repérage de l'évolution de l'emploi par milieu permet d'appréhender, par approximation, l'intensité du dualisme rural/ urbain en la matière.

Le poids relatif des Femmes dans les zones rurales s'est accru, passant de 17% en 1989 à plus de 24% en 2001, alors que celui des Hommes s'est contracté de 83% à moins de 76%. De fait l'espace d'activité rurale serait "fragilisé" sans l'effet de fixation entretenu par les Femmes.

De plus, le champ d'emploi urbain a connu, durant la même période, une évolution similaire mais plus ralentie, la part relative des Femmes passant de 21 à 25% et celle des Hommes de 79% à 75%.

Il faut dire que la mutation dans le sens d'une urbanisation plus accentuée de l'emploi féminin dans les THC - en 2001 cet emploi se localise pour 22% du total dans le secteur rural contre 28% en 1989 - aura été entretenue, en partie, par les motifs de modernisation et de compétitivité inhérents à l'ouverture de ces activités sur les marchés extérieurs.

**Tab.5 Emplois par secteur et par genre selon le milieu - 1989 et 2001 - en milliers**

	1989				2001			
	H	F	H	F	H	F	H	F
<u>Emploi Total dont :</u>	624	126	969	260	730	235	1366	459
THC	5	41	40	106	9	47	58	163
<u>Enseignement, Santé et Administration</u>	69	4	199	67	56	10	262	125
<u>Autres</u>	217	4	641	76	308	24	958	160

Par ailleurs, on constate que le dualisme rural/urbain pour les Femmes en termes d'emploi dans le secteur Enseignement - Santé - Administration a été quelque peu atténué mais, en la matière, la participation féminine dans ces activités reste limitée, aussi bien dans les zones rurales que dans les zones urbaines; la "disparité" par rapport aux Hommes est encore très grande.

On relève enfin que l'effet de diversification sectorielle, appréhendé au moyen de l'évolution du poids des autres secteurs, aura été plus sensible pour les Hommes que pour les Femmes, et pour ces dernières l'effet de diversification reste très faible dans le secteur rural et tend à s'accroître dans le secteur urbain.

b/ En parallèle à cette tendance à l'accroissement du dualisme rural/urbain, on doit considérer que le déséquilibre régional en termes de répartition sectorielle de l'emploi, favorisé par les mouvements migratoires internes, tend à s'aggraver.

La tendance "globale" à la déstructuration spatiale est en fait la résultante d'une évolution assez différenciée par genre: Accroissement du poids relatif des Hommes dans les régions de l'Est, de 67.5% en 1989 à plus de 69 % en 2001, alors que, concomitamment le poids relatif des Femmes dans les régions de l'Est a quasiment stagné, à près de 72%, exerçant ainsi un effet de rétention spatiale relatif dans les régions de l'Ouest.

Pour les Industries Manufacturières et le secteur Enseignement-Santé-Administration, le dualisme tend à s'accroître au profit des régions de l'Est, principalement Tunis et le Centre - Est, où se concentrent en 2001 près de 84% des femmes occupées dans ces activités contre 77% en 1989.

On relève, en outre, une diversification notable des activités dans les régions de l'Est, aussi bien pour les Hommes que pour les Femmes, alors que les régions de l'Ouest restent peu diversifiées en termes de postes de travail. Il s'agit là d'un facteur limitatif d'une promotion probante de l'emploi féminin.

3- La tendance au relèvement du niveau éducatif du facteur travail est nette; toutefois l'amélioration est de moindre portée pour les activités où prédomine l'emploi féminin (cf. Tab. 6).

La tendance à la résorption de la composante emploi analphabète est moins marquée pour les Femmes; de plus le poids des effectifs d'instruction primaire (faible qualification) demeure important et n'a pas atteint la phase de déclin: 44% pour les Hommes et 33% pour les Femmes en 2001 contre respectivement 41% et 30% en 1989 ; de sorte qu'en 2001 près de 3 femmes sur 5 sont faiblement dotées en capacités d'absorption technologique.

**Tab.6 Structure des emplois par genre selon le niveau d'instruction en %**

	Néant		Primaire				Secondaire				Supérieur					
	1989		2001		1989		2001		1989		2001		1989		2001	
	H	F	H	F	H	F	H	F	H	F	H	F	H	F	H	F
Emploi Total	32	38	15	26	41	30	44	33	23	26	32	29	4	6	9	12
dont : THC	17	36	6	11	57	46	48	57	24	18	41	31	2	-	5	1
enseignement, santé et administration	20	8	4	3	22	8	16	7	43	61	49	43	15	23	31	47

**Tab.7 Emplois par secteur et par genre selon la région - 1989 et 2001 - en milliers**

	Ind .Manuf				enseignement, santé et administration				Autres			
	89		01		89		01		89		01	
	H	F	H	F	H	F	H	F	H	F	H	F
Est	189	126	278	229	237	76	221	100	425	31	750	112
dont Tunis	69	32	93	58	102	39	97	46	154	19	275	57
Centre Est	70	57	105	101	64	20	58	29	135	7	240	30
Ouest	28	40	32	29	110	21	99	35	182	5	270	23

L'accroissement de la part relative de l'emploi de formation secondaire est perceptible, pour les Hommes et pour les Femmes, mais l'emploi de formation supérieure, le plus souvent d'encadrement, reste bien limité, même si sa progression est très nette. Il faut souligner à cet égard que la composante d'emploi féminin dotée d'une dose éducative supérieure progresse de façon plus soutenue que celle des Hommes.

S'agissant des THC, il ressort que le reflux du poids relatif des emplois féminins analphabètes est très net, de 36% en 1989 à 11% en 2001, cela alors même que la tendance est au gonflement de l'emploi féminin de niveau d'instruction primaire, de faible intensité éducative au regard des normes requises dans les activités manufacturières soumises à la compétition internationale.

Il faut cependant relever que la tendance au renforcement de l'emploi féminin bénéficiaire d'une dotation éducative secondaire dans les THC aura été bien marquée (31% en 2001 contre 18% en 1989); ce profil éducatif répond, dans une certaine mesure, aux exigences des opérations itératives, qui requièrent des capacités d'absorption technologiques « moyennes ».

Parallèlement la part de l'emploi doté d'une formation supérieure dans les THC a connu une évolution très faible (1 % des femmes seulement sont dotées de cette formation en 2001). Cette déficience qualitative d'encadrement est d'autant plus inquiétante que le démantèlement de l'AMF soumet les activités textiles tunisiennes à un choc de compétitivité technologique très violent.

Par ailleurs, il importe de souligner que le contenu éducatif de l'emploi féminin dans le secteur Enseignement/ Santé/ Administration s'améliore de façon plus nette que celui des Hommes, s'agissant en particulier de la dotation en formation supérieure, attestant de l'absence de discrimination par genre pour l'accès à ces emplois. Ainsi, les avancées féminines dans le domaine de

l'éducation sont bien valorisées dans ce champ d'activités.

4- Les progrès du "contenu éducatif" de l'emploi ont été traduits par des améliorations du statut socio - professionnel, conséquentes pour les Hommes mais moins probantes pour la condition sociale des Femmes.

L'évolution par statut professionnel consacre une tendance divergente par genre:

- assez favorable pour les Hommes : stabilisation de la part relative des salariées, à près des 2/3 des emplois, conjuguée avec un reflux des emplois fragile (apprentis et aides familiaux ) et un accroissement perceptible des patrons et indépendants.

- moins valorisante pour les Femmes dès lors que le poids des apprenties et aides familiales, en repli de 23% en 1989 à 17% en 2001, est encore lourd par rapport à celui des Hommes; l'accroissement du poids relatif des salariées est bien net mais sa portée est d'autant plus limitée qu'il recèle, notamment dans les industries manufacturières, une part dominante de main d'œuvre non qualifiée.

On doit, en outre, relever de façon spécifique que l'emploi féminin demeure très vulnérable dans les THC par suite de la prédominance du salariat féminin à caractère temporaire et d'une proportion non négligeable d'apprenties.

A ce stade, et pour évaluer le contenu en emploi des politiques commerciales d'ouverture, il importe de prendre en considération non seulement l'effet d'emploi direct au niveau de chaque branche mais aussi les flux de travail transitant par les échanges intersectoriels en recourant aux multiplicateurs d'emploi qui rendent compte du degré d'entraînement générés par les secteurs concernés par l'emploi féminin.

**Tab.8 Structure des emplois par secteur et par genre selon le statut - 1989 et 2001 - en %.**

	patrons/indépendants				Salariés				Apprentis/Aides familiaux			
	1989		2001		1989		2001		1989		2001	
	H	F	H	F	H	F	H	F	H	F	H	F
Emploi Total	25	20	28	15	68	57	67	68	7	23	5	17
dont : THC	24	39	19	14	71	46	78	82	5	15	3	4
enseignement, santé et administration	1	1	2	1	99	98	98	99	-	1	-	-

### 3. Les multiplicateurs d'emploi féminin à l'épreuve de l'ouverture

Pour évaluer l'impact de l'ouverture commerciale en termes de synergies sectorielles de croissance de produit et d'emploi, on aura recours au modèle input/output qui met l'accent sur les relations intersectorielles. Le repérage du contenu sectoriel en emploi féminin, direct et indirect, implique le recours aux multiplicateurs d'emploi différenciés selon le niveau éducatif et de qualification professionnelle du facteur travail. De ce point de vue, on doit relever que l'intensification technologique des flux de biens et services exportés requiert une mutation des qualifications du facteur travail, comme le soulignent les Rapports Mondiaux sur le Développement Humain du PNUD.

On se propose dans ce qui suit de faire ressortir les motricités de croissance des activités mobilisant à titre principal l'emploi des Femmes, au moyen des effets de multiplication d'emploi pour la période d'intensification du processus de Libéralisation/ Ouverture, i.e. la décennie 90, cela en décomposant le facteur travail selon le niveau d'instruction et le statut socioprofessionnel.

#### Cadre Méthodologique

On se réfère à un cadre d'équilibre multisectoriel (Voir détails méthodologiques in Ben Slama, Boumediène, GEMDEV, Paris juin 2003) en considérant l'identité comptable de base :

$X = AX - M_m + F_d - M_f + E$  qui se déduit de l'équilibre ressources - emplois:

$X + M = AX + F_d + E$  avec  $M = M_f + M_m$  et où:

$X$  = vecteur des produits

$A$  = matrice des coefficients techniques

$E$  = vecteur des exportations

$F_d$  = vecteur de la demande finale locale

$M_f$  = vecteur des importations au titre de la demande finale

$M_m$  = vecteur des importations de biens intermédiaires

$M = [a_{ij}^m]$  est la matrice des coefficients d'importation à titre intermédiaire et

$\hat{M}_f$  est la matrice diagonale des coefficients d'importation à titre final.

En fait, dans cette approche, la croissance d'un secteur est conditionnée par la « pression » des composantes de sa demande propre mais aussi par la marge de « croissance intersectorielle » induite par la demande intermédiaire des autres secteurs.

Il importe donc d'envisager ces effets directs et indirects en prenant en considération les matrices inverses  $K = [I - (A - M)]^{-1}$  des coefficients locaux.

En posant  $(A - M) = A^d$  à partir de la dissociation des consommations intermédiaires d'origine locale des importations d'inputs, on obtient la relation suivante  $X = (I - A^d)^{-1} Y$  où :

$A^d$  est la matrice des coefficients techniques locaux.

$Y$  est le vecteur de la demande finale

Ainsi, à partir des pressions de demandes finales sectorielles, le multiplicateur matriciel  $(I - A^d)^{-1}$  permet de tenir compte des répercussions directes et indirectes - potentialités d'entraînement - qui induisent des accroissements de produits sectoriels selon une intensité inégale.

Aussi faut-il mesurer les répercussions directes et indirectes potentielles de chaque secteur au moyen de la matrice inverse  $(I - A^d)^{-1} = [K_{ij}]$ . Ce cadre nous permet de calculer pour chaque secteur  $j$  le multiplicateur  $K_{:j}^d = \sum_i K_{ij}$

Ce multiplicateur exprime l'intensité de l'entraînement exercé par le secteur  $j$  en amont sur les secteurs locaux et rend compte de l'ampleur des liaisons permises par les capacités de production intérieures. L'analyse de la structure du multiplicateur du produit d'un secteur  $j$  (structure de la colonne  $j$  de la matrice inverse) permet de repérer l'impact du secteur  $j$  sur chacun des autres secteurs, soit le degré de diffusion de cet entraînement intersectoriel.

Une variante pertinente de cette approche consiste à évaluer l'effet exercé par une « unité composite d'exportation »  $K_{exp}$  sur les différents secteurs.

Pour cela on définit le vecteur colonne  $e$  des coefficients  $e_i$  représentant la part relative des exportations de chaque secteur dans les exportations totales, avec  $\sum_i e_i = 1$

L'effet de l'impulsion exercée sur les différents secteurs par une « unité composite d'exportation » se déduit de la relation suivante :  $K_{exp} = (I - A^d)^{-1} \cdot e$

De même qu'on peut considérer l'effet de l'impulsion exercée sur les différents secteurs par une « unité composite de demande finale locale »  $K_d$  en considérant le vecteur  $de$  des coefficients  $d_i$  représentant la part relative des demandes finales locales de chaque secteur dans la demande finale locale, avec  $\sum_i d_i = 1$

Cet effet se déduit de la relation suivante :

$$K_d = (I - A^d)^{-1} d_e$$

Par ailleurs, il importe de «compléter» le repérage de la motricité intersectorielle au moyen du multiplicateur de produit envisagé supra en considérant la multiplication en termes d'emplois.

L'effet emploi peut être mesuré par les coefficients d'emploi directs  $l_i$  définis comme le nombre d'unités de travail par unité de produit  $i$ , soit :

$$l_i = L_i / X_i$$

Si  $l$  est le vecteur ligne des coefficients  $l_i$ , l'emploi total dans le système économique  $L$  (scalaire) s'écrit:  $L = l X = l (I - A^d)^{-1} Y$

$$\text{soit : } \Delta L = l (I - A^d)^{-1} \Delta Y$$

Dans le cas où  $\Delta Y = 0$  pour tout  $i \neq j$ , on obtient

$$\Delta L = \sum_i l_i K_{ij} \Delta Y_j$$

Ainsi pour une unité additionnelle de demande finale (exportation ou demande intérieure) dans le secteur  $j$  quelconque, l'effet emploi direct et indirect est donc:  $l^*_j = \sum_i l_i K_{ij}$

De même qu'on peut attacher à  $K_{exp}$  et  $K_d$  un pouvoir d'induction en termes d'emploi.

On peut définir:

$l^*_{exp}$  = effet direct et indirect d'emploi d'une unité composite d'exportation

$l^*_d$  = effet direct et indirect d'emploi d'une unité composite de demande locale

$$\text{Comme suit : } l^*_{exp} = \sum_i l_i K_{exp}$$

$$l^*_d = \sum_i l_i K_d$$

En éclatant les coefficients d'emploi direct en  $m$  niveaux d'instruction ou statuts professionnels, on est amené à substituer au vecteur ligne  $l$  une matrice  $(m, n)$  des coefficients d'emploi direct par contenu éducatif ou contenu de "statut".

On peut alors écrire pour  $k = 1, 2, \dots, m$

$$L = [l_{kj}] [I - A^d]^{-1} Y = [\alpha_{kj}] Y$$

$$\text{D'où: } L = [\alpha_{kj}] Y$$

Dans le cas où  $\Delta Y = 0$  pour tout  $i \neq j$  on obtient :

$$\Delta L = \sum_{k=1}^m \alpha_{kj} \Delta Y_j$$

$$\text{Soit: } l^*_{kj} = \sum_{k=1}^m \alpha_{kj}$$

Ainsi pour une unité additionnelle de demande finale dans le secteur  $j$  quelconque, l'effet emploi, direct et indirect par niveau d'instruction ou par catégorie de statut professionnel est obtenu en considérant les  $m$  composantes de  $l^*_{kj}$ .

De même qu'on peut décomposer  $l^*_{exp}$  et  $l^*_d$  en  $m$  niveaux d'instruction ou statuts.

$$\text{On peut en effet écrire : } l^*_{exp} = [l_{kj}] [I - A^d]^{-1} e$$

$$\text{Soit } l^*_{exp} = \sum_{k=1}^m [\alpha_{kj}] e$$

$$\text{Et } l^*_{d} = \sum_{k=1}^m [\alpha_{kj}] d_e$$

Les impacts d'emploi par niveau d'instruction ou par catégorie de statut professionnel d'une unité composite d'exportation et d'une unité composite de demande finale locale peuvent être différenciés en considérant respectivement les  $m$  composantes de  $l^*_{exp}$  et les  $m$  composantes de  $l^*_{d}$ .

L'application de la méthodologie ci-dessus a nécessité l'utilisation des tableaux entrées - sorties TES et les données sur l'emploi de l'INS.

Quatre niveaux d'instruction, par genre, sont distingués: néant, primaire, secondaire et supérieur; cette information concerne les actifs occupés susceptibles d'avoir fréquenté un établissement scolaire et ayant atteint le degré d'enseignement le plus élevé.

Pour le statut professionnel, on considère, par genre, trois composantes: Patrons/Indépendants, Salariés et Apprentis/Aides Familiaux.

### Multiplicateurs d'emploi féminin : Analyse des résultats

Sur la base des données consignées en annexe, on peut faire ressortir, pour la période d'intensification du processus d'ouverture, les mutations, différenciées par genre, dans les activités labour-using à titre direct  $l_i$  et total  $l^*_j$ , cela à partir de leur rang en termes d'effet emploi par rapport aux autres activités. L'attention sera portée sur les activités à forte intensité d'emploi féminin du secteur productif non agricole, s'agissant principalement du «Textile - Habillement - Cuirs et Chaussures».

**Tab.9 Effet emploi direct et total indirect**

	THC		Commerce	
	1990	2000	1990	2000
Effet direct $l_i$	0,136	0,084	0,129	0,143
Rang sectoriel	3	5	4	2
Effet total $l_j^{**}$	0,167	0,107	0,166	0,163
Rang sectoriel	4	7	5	3
Contribution des femme à $l_i$ en %	75	76	8	14
Contribution des femme à $l_j^{**}$ en %	69	0	9	14
$l_j^{**} \cdot l_i / l_j^{**}$ en %	19	22	22	12

Au cours de cette étape d'intense ouverture commerciale, les activités de prédilection du travail féminin se trouvent toujours aux premiers rangs des secteurs moteurs en termes d'emploi dans l'ensemble du système économique, qu'il s'agisse de leur impact direct ou de l'intensité de leurs répercussions indirectes; cela au delà de la nette tendance à la baisse des deux effets  $l_i$  et  $l_j^{**}$ , par suite de l'intensification des processus productifs.

Les THC confirment leur nature labour-using pour les Femmes, qui vient « bonifier » leur capacité d'entraînement par le produit. Leurs effets d'emploi sont assez sensibles, avec toutefois une tendance marquée à la décélération ce qui rend compte de l'accroissement de leur intensité capitalistique et atteste, pour ce secteur moteur d'exportation, d'un essoufflement perceptible de son pouvoir d'induction en matière d'emploi  $l_j^{**}$ , qui passe de 0.167 en 1990 à 0.107 en 2000.

L'émergence de l'emploi féminin dans les activités commerciales - en progression très nette malgré son poids relatif encore limité - est clairement attestée par l'accroissement de la contribution des Femmes aux effets d'emploi, de 8% en 1990 à 14% en 2000, avec une tendance marquée à l'amélioration de la "qualité" de cet emploi (voir infra).

Notons, par ailleurs, du point de vue de l'intensité relative des effets indirects d'emploi, i.e. de la croissance transmise en termes d'emploi, que l'effet induit en la matière, mesuré par le ratio  $l_j^{**} \cdot l_i / l_j^{**}$  tend à se renforcer pour les THC, de 19% en 1990 à 22% en 2000, tout en restant en deçà de l'induction produite par les IME ou la Chimie.

### Motricité de l'emploi féminin et contenu éducatif

Au delà de la structure par dotation éducative directe du facteur travail féminin, il ressort de l'effet d'emploi direct et indirect par niveau

d'instruction  $l_j^{**}$ , que l'impact des relations intersectorielles sur le niveau éducatif de l'emploi induit aura été assez relatif (voir Ben Slama, Boumediène, op.cit, Paris 2003).

**Tab.10 Structure par niveau d'instruction de l'effet d'emploi féminin direct et total en %**

	Effet direct d'emploi féminin				Effet total d'emploi féminin			
	THC		Commerce		THC		Commerce	
	1990	2000	1990	2000	1990	2000	1990	2000
Néant	36	18	11	11	36	18	22	15
Primaire	46	56	45	33	45	55	32	31
Secondaire	18	26	44	50	18	26	41	47
Supérieur	-	-	-	6	1	1	5	6
Total	100	100	100	100	100	100	100	100

La dotation éducative de l'emploi indirect féminin, transmis lors des relations intersectorielles de croissance, n'améliore pas significativement la structure «directe» par niveau d'instruction de l'emploi féminin.

En fait, l'effet total éducatif  $l_j^{**}$  n'apporte, sur l'ensemble de la décennie 90, qu'une correction très limitée aux déficiences d'instruction "directes" du facteur travail féminin dans les THC. Dans ce secteur moteur des exportations, la prédominance des profils de faible intensité éducative dans l'effet total d'emploi féminin se retrouve dans des proportions quasi - identiques par rapport à la structure directe.

De plus, en considérant, à présent, les multiplicateurs attachés à l'unité composite d'exportation et à l'unité composite de demande intérieure, il ressort des tableaux consignés en annexe que :

1. La part relative des femmes ne subit pas de mutation significative pour  $l_a^{**}$  (16% en 1980 et en 1998) et progresse sensiblement pour  $l_{exp}^{**}$  (33% en 1980 et 37% en 1998).
2. L'amélioration de l'intensité éducative pour l'unité composite d'exportation d'ensemble (hommes + femmes), toute relative mais bien plus nette que celle de l'unité composite de demande intérieure, soutient le mouvement de la croissance tirée par la demande extérieure. Elle s'inscrit dans le sens de la nouvelle croissance endogène intensive en qualification et rend compte des exigences technologiques (éducation) requises pour entretenir l'accès au marché international.

3. L'amélioration de la dotation d'instruction directe et indirecte de l'emploi féminin est assez sensible, mais elle est moins marquée pour l'unité composite d'exportation; la part d'analphabètes de cette dernière unité régresse de 88% en 1980 à 72% en 1998 alors que celle attachée à l'unité de demande intérieure a été abaissée de 88% en 1980 à 69% en 1998. Cette disparité s'explique, en partie, par le poids déterminant des THC - activités « lourdement » dotées en facteur travail féminin de faible qualification - dans  $I_{exp}^*$

On retiendra donc, au vu des multiplicateurs d'emploi selon le niveau d'instruction  $I_{j}^{**}$ , que le jeu de la multiplication intersectorielle n'induit que de faibles modifications positives à la structure éducative du facteur travail féminin, peu probantes au regard des contraintes de compétitivité extérieure pour les activités tournées vers l'exportation.

Il faut à cet égard relever que le recrutement des femmes en stage dans le secteur industriel représente 13,4% de l'ensemble des Femmes placées contre 28,4% pour les Hommes (R.Zghal, CREDIF, 2005). Toutefois, il importe de souligner que le dispositif de formation qualifiante de l'Agence Tunisienne de la Formation Professionnelle tend à pallier les déficits d'éducation initiale. La mise en œuvre du programme MANFORME de mise à niveau de la formation professionnelle publique et privée doit doter les entreprises en compétences

pour faire face aux besoins de l'insertion dans la zone de libre-échange euro - méditerranéenne. (cf.Tab. 11)

L'effectif total dans ces filières de formation professionnelle tend à croître de façon très sensible, s'agissant en particulier des stagiaires en formation avec, globalement, une progression appréciable de l'effectif des Filles, notamment dans les Administrations et les THC. Toutefois, pour ce dernier secteur test de l'ouverture commerciale, et au delà de l'évolution enregistrée, on doit retenir que "l'effet de résorption" des déficits de qualification relevés supra est assez limité au regard des effectifs féminins engagés dans ce secteur.

De ce point de vue on doit signaler que le X° Plan prévoit d'intégrer dans tous les centres de l'ATFP une formation en compétences d'entrepreneuriat et gestion pour favoriser la création d'entreprise.

### Motricité de l'emploi féminin et statut professionnel

S'agissant de la structure socio - professionnelle des Femmes, il ressort des calculs auxquels on a procédé, que l'effet d'emploi féminin total  $I_{j}^{**}$  par statut n'aura pas induit d'amélioration probante par rapport à la structure directe de l'effet d'emploi en la matière.

**Tab.11 Stagiaires et Apprentis en formation - ATFP**

	Stagiaires				Apprntis			
	1998		2002		1998		2002	
	effectif	F en %	effectif	F en %	effectif	F en %	effectif	F en %
Total	14126	30	32838	36	42935	39	43239	39
dont : THC	2877	65	8014	72	16313	86	15966	83
IME	499	10	1706	14				
Administratin	732	72	1607	75				
tourisme	240	26	165	25				

**Tab.12 Structure par statut professionnel de l'effet d'emploi féminin direct et total en %**

	Effet direct d'emploi féminin				Effet total d'emploi féminin			
	THC		Commerce		THC		Commerce	
	1990	2000	1990	2000	1990	2000	1990	2000
Patrons / Indépendant	39	14	23	35	38	14	20	31
Salariées	46	82	64	58	46	81	66	60
Apprenties/Aides Familiales	15	4	13	7	16	5	14	9
Total	100	100	100	100	100	100	100	100

Dans les THC on se retrouve avec un constat de vulnérabilité attachée à la catégorie des salariées précaires et de faible qualification. Il faut dire, sur la base des enquêtes auprès des entreprises, que la tendance à la création d'emplois temporaires s'est accélérée depuis 1997 (voir Banque Mondiale: Stratégie d'emploi en Tunisie, 26/2/03), affectant davantage les PME (< à 50 emplois) que les grandes entreprises, ce qui atteste, selon l'étude de la BM d'un besoin de flexibilité accrue de la main d'œuvre. On observera de ce point de vue que près de la moitié des entreprises du secteur textile sont de petite taille (voir Etude Gherzi, mai 1998).

La tendance à la valorisation du statut professionnel des Femmes dans les activités commerciales, parallèlement à leurs avancées éducatives, est bien perceptible : la part des Femmes de la catégorie Patrons /Indépendants dans l'effet total d'emploi féminin progresse en effet de 20% en 1990 à 31% en 2000.

On peut dire à ce stade, que la structure du multiplicateur d'emploi féminin par statut est quasi - stable par rapport aux coefficients de structure directe; ce qui atteste que la croissance transmise par les activités à dominante féminine s'oriente, à titre principal, vers des secteurs de statut professionnel féminin "équivalent".

*\* En définitive, au terme de cette synopsis sectorielle de l'emploi féminin afférent à la phase de libéralisation et d'ouverture commerciale, on pu mettre en évidence une tendance nette dans le sens d'une participation plus accrue des Femmes dans le marché du travail. Cette évolution a été favorisée par :*

- un processus de substitution des Femmes aux Hommes dans l'Agriculture, secteur délaissé par l'effet de mouvements migratoires masculins.
- l'éclosion d'activités exportatrices manufacturières, principalement les THC, mobilisatrices de main d'œuvre féminine, flexible et bon marché, et donc d'avantages comparatifs en termes de coûts du travail.
- le relèvement du niveau éducatif des Filles et de leur qualification professionnelle, qui a permis aux Femmes de consolider leur présence dans le secteur Enseignement/ Santé/ Administration. On doit toutefois préciser à cet égard, que, pour ce qui est du secteur productif, la tendance est au comblement des besoins éducatifs de base et intermédiaires sans apporter

de réponse significative aux besoins patents d'encadrement.

*\*Au total, et sur la base des enseignements de l'analyse supra, on peut avancer les recommandations suivantes pour la consolidation de l'emploi féminin :*

- Les Filles de la tranche d'âge pertinente 25-29 ans n'occupent en 2001 que 30% des emplois de ce segment de la population active, soit une proportion non conforme à leur rapide progression en matière d'éducation et de formation, qui dépasse celle des Garçons. D'où la nécessité de procéder à une évaluation permanente, dans les secteurs de prédilection de l'emploi féminin, de l'évolution de cette catégorie féminine en butte , tout particulièrement, aux problèmes d'accès à l'emploi pour les diplômés de l'ES.
- Les chances de "poursuite" des Femmes travaillant dans les PME de textiles, au regard des défis qui se profilent, sont tributaires de la montée en gamme et donc de l'élévation des niveaux de qualification. Plus particulièrement, le besoin accru de flexibilité et de production en "juste - à temps", requiert une plus grande polyvalence de la main d'œuvre d'où l'obligation, comme le souligne l'OIT, d'intensifier les programmes de formation continue appropriés : séminaires courts, conférences, mais aussi actions de formation de moyen et long termes. De ce point de vue, si la tendance est au comblement des besoins éducatifs de base et intermédiaires dans ce secteur fortement féminisé, une réponse pressante doit être apportée aux besoins patents d'encadrement pour faire face au choc de compétitivité technologique avec les produits asiatiques.
- Eu égard à la faible diversification sectorielle des emplois féminins - concentrés pour plus de la moitié dans des activités de faible qualification - par rapport à ceux occupés par les Garçons, et au regard des progrès de l'éducation et de l'accroissement des taux d'activité des Femmes, il importe d'adopter des mesures d'incitation à la création d'emplois féminins dans les créneaux porteurs en termes de taux de valeur ajoutée et d'intensité technologique. Cette diversification hors des THC, qui concernerait d'autres activités manufacturières mais aussi et surtout des

activités de services, reste tributaire d'un élargissement de la taille des entreprises pour autoriser un relèvement des taux d'encadrement et une mobilisation des rendements d'échelles, de même qu'elle reste conditionnée par la maîtrise des problèmes de Corporate Governance ( Voir les aspects et indicateurs de Gouvernance d'entreprises dans la récente contribution « Doing Business 2004 » de la Banque Mondiale).

- Dans cette perspective, il serait opportun d'établir des indicateurs de repérage des facteurs de consolidation et/ou de précarisation de l'emploi féminin et d'en assurer un suivi régulier, s'agissant en particulier des paramètres de productivité et de la participation des Femmes dans les nouvelles filières d'agriculture commerciale (primeurs, bio) et dans les segments manufacturiers à forte teneur technologique.

- La participation active des Femmes, dans le cadre du Plan et des sphères entrepreneuriales, au processus de décision en matière de localisation des investissements et de création d'emplois par genre permettrait d'atténuer l'effet d'inégalité régionale (en faveur des régions de l'Est) entretenue par la politique de libéralisation et d'extraversion.

Toutefois, à ce stade, on doit considérer le problème des coûts sociaux liés aux restructurations induites par les démantèlements tarifaires, à quoi s'ajoutent les impacts en termes d'emploi des privatisations.

### Les restructurations : quid du devenir des femmes?

L'intensification de la concurrence, tant sur le marché national qu'à l'exportation, s'est traduite par des restructurations d'entreprises - on estime que près du tiers des entreprises manufacturières ne survivraient pas à l'ouverture du marché tunisien - et donc des tensions sur le marché du travail.

Ces reconversions, qui se poursuivent, interpellent les opérateurs - pouvoirs publics, chefs d'entreprises, travailleurs et syndicats - et posent la question de savoir dans quelle mesure les femmes soumises au risque de licenciement économique bénéficient-elles de mesures de "protection"?

Une commission de suivi des entreprises en difficultés économiques a été mise en place en 1995 pour aider ces dernières à se redresser. Ainsi, sur 1277 entreprises dites en difficulté bénéficiaires de la loi de 1995, depuis la fin 1995 à fin 2002, près de 50% ont été redressées et de ce fait 32 000 emplois ont été "sauvés" sur 47 000 déclarés ; les entreprises restantes ont été déclarées en faillite, ou à l'étude ou encore en instance auprès des tribunaux. Il faut dire que 3/5 des entreprises en difficulté relèvent du secteur industriel, et près du 1/3 des entreprises concernées dans ce dernier secteur sont dans les Textiles, 1/4 dans les Industries Agricoles et Alimentaires et 1/7 dans les Industries Mécaniques et Electriques, soit des activités des activités à présence féminine majoritaire ou forte.

L'impact du régime de redressement des entreprises en difficulté sur les conditions de travail des Femmes est apprécié de façon différenciée selon les opérateurs (instances administratives, syndicats, banques, patronat).

Par delà la position des instances administratives, pour lesquelles il n'existe aucune discrimination entre Hommes et Femmes dans l'application des textes, et de celle de l'UGTT qui considère que l'application des dispositions du code du travail dans le secteur privé est "catastrophique" alors que la protection légale est appliquée correctement dans le secteur public, tous les opérateurs mettent souvent en exergue les préjudices inhérents à l'allongement des délais de procédure judiciaire, au cours desquels les paiements de salaires sont suspendus. Il faut dire qu'au regard des critères de licenciement économique retenus, et par delà les protections légales et la portée assez limitée des mécanismes de compensation et de reconversion, l'impact sur les Femmes des opérations de restructuration inhérentes à l'intégration dans l'économie mondiale reste sensible ; la plupart des ouvrières se trouvent dans des conditions d'âge, de statut et de qualification précaires, notamment dans les THC qui les rendent particulièrement exposées, notamment dans le cas « d'émigration sauvage », du jour au lendemain, des entreprises étrangères d'exportation, cela alors que le démantèlement des AMF est effectif et que le processus d'ouverture sur l'UE s'accélère. De fait pour les entreprises qui survivent, les Femmes acceptent très souvent des réductions salariales en raison de leur état de précarité sociale.

Par ailleurs, la réactivité des Femmes, par rapport à l'ensemble des mécanismes de recyclage pour réinsertion/ reconversion, est faible, ce qui est redevable, en partie, à une méconnaissance de l'information en la matière.

***\*Partant de ce constat, il importe de considérer que:***

- Le souci de l'équité par genre appelle un suivi continu de l'application de la convention de l'OIT sur l'égalité de rémunération entre les genres à prestation de travail équivalente ainsi qu'un suivi serré du respect des normes de santé et de sécurité, notamment dans les PME à dominante féminine. De façon spécifique, les Partenariats avec l'étranger - notamment les opérations de sous-traitance Internationale - devraient porter une attention particulière à l'impact genre (formation complémentaire, organisation du travail, ...) et se conformer au respect des normes de travail décentes pour les Femmes.

- L'allongement des délais de procédure judiciaire pour les entreprises en difficulté accentue l'état de précarité de l'emploi féminin ; aussi est-il nécessaire d'envisager des modalités et voies de recours pour garantir un respect effectif de ces délais voire les réduire.

- Le recyclage des travailleuses, soumises au risque de perte ou de volatilité d'emploi, est désormais privilégié comme principal instrument d'une politique active de l'emploi (voir BIRD 2003). Par delà les actions publiques dans ce sens, il importe d'impliquer davantage les opérateurs privés, fédérations patronales et syndicats, et de motiver voire de subventionner les Femmes pour adhérer à ces programmes, eu égard à leur faible réactivité au recyclage dans les secteurs exposés (THC en particulier).

- Au regard des échéances commerciales qui s'annoncent, il est recommandé de recourir aux modes de formation tout au long de la vie, pour faire face aux chocs de compétitivité extérieure dans les secteurs exposés à prédominance féminine, en intensifiant le recours aux NTIC afin d'accroître les capacités d'adaptation et faciliter l'introduction des méthodes de formation à distance.

#### 4. Entrepreneuriat féminin : vers de nouvelles orientations ?

L'orientation sur la voie de la libéralisation et de l'intégration dans l'économie mondiale génère pour le genre féminin tout à la fois des coûts sociaux liés aux restructurations mais aussi de nouvelles opportunités d'entrepreneuriat et de création d'activités, en corrélation avec les progrès de l'éducation des Filles et de la promotion sociale des Femmes.

Tirant profit des nouvelles possibilités de création d'activités, y compris à l'exportation, et du cadre incitatif à l'investissement, les progrès de l'entrepreneuriat féminin ont été plus marqués dans les activités industrielles et les services que dans l'Agriculture, sous l'impulsion de la Fédération des Femmes chefs d'entreprise de l'UTICA qui regroupe actuellement plus de 8000 membres et exerce un effet de catalyse probant en la matière au moyen d'activités de promotion, d'information et de formation (accent sur les techniques de montage des projets).

Les jeunes promotrices sortantes du système universitaire et les femmes qui profitent des nouveaux créneaux ouverts à l'exportation tendent en effet à rejoindre en masse cette Fédération. Dans ce cadre, outre une concentration encore nette dans les petits métiers (Services en particulier) et les THC, on note que l'émergence d'un esprit entrepreneurial dans les NTIC est bien perceptible (complexe El Ghazala).

Il reste cependant que la taille des entreprises est à prédominance de petits projets, souvent familiaux, pour plus de 5/6, le reste des entreprises, près de 1/6. De ce point de vue, Il faut considérer que les sociétés détenues par les femmes appartiennent, en général, aux catégories des PME. Ainsi plus de 95 % des sociétés détenues par des femmes en Corée emploient moins de cinq personnes (voir OCDE, 2000).

Ces femmes chefs d'entreprises éprouvent le plus souvent des difficultés d'accès au crédit par suite du manque de garanties suffisantes, à quoi s'ajoutent les défaillances en matière de présentation des projets et le "défaut d'accompagnement" des banques - moins d'expérience administrative et entrepreneuriale et d'antécédents en matière de crédits auprès des banques que les Hommes - cela alors même

que les Femmes sont plus "disciplinées" en matière de remboursement des crédits que les Hommes. On doit aussi considérer que, les besoins en capitaux des petites entreprises étant généralement restreints, les coûts fixes qui s'y attachent sont plus élevés et la rentabilité est moindre pour les banques, ce qui explique en partie les réticences de ces dernières. En fait la principale difficulté d'accès au financement tient à la faiblesse de l'apport personnel de départ, d'où la tendance à se concentrer dans des secteurs nécessitant peu de fonds propres au démarrage de l'entreprise (OCDE, op.cit.).

Par ailleurs, ces Femmes chefs d'entreprise font face à des problèmes d'accès au marché et de commercialisation extérieure - participation insuffisante aux foires et aux délégations d'affaires - au moment où les difficultés se profilent dans les THC, secteur à forte présence féminine.

A ce stade, il convient de tester la réactivité des Femmes chefs d'entreprise aux nouvelles incitations à l'investissement qui ont été multipliées lors de la décennie 90, en se référant aux données de l'API relatives aux activités industrielles.

En considérant le tableau ci - dessous, il ressort en particulier que le rythme de progression du nombre d'entreprises industrielles dirigées par des Femmes s'est accéléré au cours de cette phase de Libéralisation/Ouverture. Cette progression de l'entrepreneuriat féminin a été empreinte du sceau de l'extraversion dès lors que le nombre d'entreprises féminines totalement exportatrices a progressé de façon spectaculaire. Elle résulte dans une large mesure, de la mobilisation des capacités éducatives et de qualification féminines, et rend compte, en même temps, de l'attrait exercé sur les Femmes par l'ouverture sur l'extérieur.

De ce point de vue il faut relever que ce dynamisme féminin à l'exportation est en fait concentré dans les THC, et très faiblement diversifié. Toutefois, sur l'ensemble des entreprises féminines, la concentration dans les THC est moins marquée, avec une tendance intéressante à l'éclosion d'activités dans les IME en fin de période. Sur ces deux tableaux, total des entreprises et entreprises exportatrices, le schéma de répartition sectorielle masculin est nettement plus diversifié que celui des Femmes, attestant ainsi d'une expérience entrepreneuriale plus grande, couplée avec une aptitude plus affirmée à la diversification des projets.

De plus, il se dégage du tableau ci - après que la capacité des Femmes à monter des projets d'une taille significative - tranche de capital supérieure à 50 000 dinars - s'est avérée limitée, confirmant, en partie, le diagnostic supra d'inégalité d'accès au capital par sexe.

**Tab.13 Entreprises industrielles dirigées par des Femmes par secteur**

	IAA	IME	THC	Autres	Total
N d'entreprises dirigées par des Femmes					
1992	2	-	9	1	12
1992 - juin 2003	20	25	212	29	286
N d'entreprises totalement exportatrices dirigées par des Femmes					
1992	-	-	8	-	8
1992 - juin 2003	2	17	192	8	219
N d'entreprises dirigées par des Femmes d'une tranche de capital > 50 000 dinars					
1992 - juin 2003	2	-	3	1	5
1992 - juin 2003	10	12	47	13	82
en % de (a)	50	48	22	45	29

Par ailleurs, il importe de noter que cet entrepreneuriat féminin a tendance à "se localiser" quasi - exclusivement dans les régions de l'Est - en particulier Tunis et le Centre - Est - en désertant les régions de l'Ouest, presque totalement pour les entreprises exportatrices.

**Tab.14 Entreprises industrielles dirigées par des Femmes : Emplois selon la région 1992-juin 2003**

	Total des entreprises		dont : Entreprises totalement exportatrices	
	N d'entreprises	Emplois en milliers	N d'entreprises	Emplois en milliers
Est	267	13,9	212	11,8
Ouest	19	0,9	7	0,7

L'attrait des grandes villes du littoral s'explique certes par les opportunités de mobilisation des économies externes liées aux effets d'agglomération et à la disponibilité des services à l'exportation, mais ce dualisme de comportement entrepreneurial féminin contribue à accentuer le déséquilibre régional entre les régions de l'Est et les régions de l'Ouest.

D'un autre point de vue, et sur la base des résultats consignés dans le tableau suivant, on peut constater que la dynamique de l'entrepreneuriat industriel féminin a exercé un impact globalement favorable sur l'emploi.

**Tab.15 Emploi des entreprises dirigées par des Femmes en milliers**

	IAA	IME	THC	Autres	Total
<b>Entreprises dirigées par des Femmes</b>					
1992	0,2	-	0,6	0,1	0,8
1992 - juin 2003	0,8	1,4	11,5	1,1	14,8(b)
en % de (b)	6	10	78	7	100
<b>Entreprises totalement exportatrices dirigées par des Femmes</b>					
1992	-	-	0,5	-	0,5
1992 - juin 2003	0,1	1,2	10,7	0,5	12,5(c)
en % de (c)	1	10	85	4	100

Le poids relatif des emplois encadrés par des Femmes reste encore bien faible par rapport à la norme masculine; cependant le rythme de croissance de l'emploi industriel dirigé par les Femmes aura été plus rapide que celui de l'emploi dirigé par les Hommes, les projets féminins se révélant, dans une certaine mesure, plus labour-intensive que les projets dirigés par les Hommes, notamment dans les entreprises totalement exportatrices (VOIR PNUD LIB 2004).

On observera toutefois que la contribution des entreprises manufacturières féminines à l'emploi, de plus en plus nette, se localise, à titre principal, dans les segments de faible qualification (THC).

### Vers de nouvelles orientations entrepreneuriales féminines

A la lumière des nouvelles tendances/contraintes commerciales internationales, et par delà la consolidation de leur présence dans certains segments de THC (bonneterie en particulier), les Femmes entrepreneurs sont aujourd'hui confrontées à l'obligation d'une diversification de leurs projets et d'une intensification de la teneur technologique de leurs activités. Pour ce faire différentes pré - conditions sont requises, notamment l'accès à l'économie du savoir et aux carrières d'ingénieur.

**a/** L'économie du savoir, par la mobilisation des NTIC, induit de nouveaux modes d'organisation de la production et d'organisation. Le problème de l'adaptation aux contraintes de la Nouvelle Economie est posé. Les femmes qui ont su s'adapter aux nouvelles exigences des NTIC seront les plus à même de profiter des nouvelles opportunités de la mondialisation. Il est vrai qu'à l'instar des pays industrialisés, la diffusion des TIC risque de réduire la part des emplois peu qualifiés «car le travail repose de plus en plus sur le Savoir, et ceux qui ont les bases nécessaires pour acquérir

des connaissances, sont également ceux qui tirent le plus grand avantage de l'économie en réseau» (voir «Femmes et Métiers d'Avenir», Consulting Agency in Communal Development et Management of Entreprises- novembre 2004).

La progression des étudiantes dans les NTIC est spectaculaires : les Filles représentent 41% de l'ensemble des étudiants inscrit dans ces secteurs en 2004 contre 28% en 2000 ; toutefois près des 2/5 d'entre elles suivent un cursus de techniciennes supérieures. La «parité» dans ce domaine est prévue par le MES à l'horizon 2011(voir étude supra, op.cit).

De plus les Filles ont bénéficié de la mise à niveau du dispositif de la formation professionnelle des centres sectoriels et des centres polyvalents relevant de l'Agence Tunisienne de la Formation Professionnelle (A.T.F.P). Celles inscrites dans les filières de l'informatique et de la communication représentent, à fin décembre 2003, près de 27% de l'ensemble des inscrits (voir, op. cit).

**b/** Selon R.Zghal ( CREDIF, 2005 ) les industries manufacturières hors THC sont des secteurs relativement ouverts aux Femmes ingénieurs, avec 12% de l'ensemble des placées en SIVP, contre 2,4% seulement pour les THC.

Les résultats de l'enquête de Mme Zghal attestent de :

- L'existence de discrimination à l'égard des ingénieures, au niveau des chances d'être recrutée surtout dans le secteur privé (refus des candidates femmes dans certains cas malgré des résultats positifs aux tests) et des opportunités de formation et de promotion ; le secteur public semble le moins discriminant (recrutement sur la base de concours d'où davantage d'équité).
- La présence majoritaire des ingénieures dans les emplois salariés et plus précisément dans le domaine public est confirmée.
- La perception de l'inégalité selon le genre est forte : 3/4 des ingénieures croient à l'inégalité des chances entre hommes et femmes en matière d'accès à l'emploi,

L'enquête révèle, par ailleurs, que la création d'écoles d'ingénieurs en Tunisie, constitue une opportunité indispensable pour la formation d'ingénieures, (faible disposition des familles à envoyer leurs filles faire des études d'ingénieur à l'étranger).

Ainsi, en Tunisie, comme dans les pays de l'OCDE et les pays émergents, le poids des PME appartenant à des femmes est en augmentation continue. Ces femmes entrepreneurs, désireuses de concilier leur vie familiale et un emploi rémunérateur, choisissent souvent de s'établir à leur compte pour pouvoir progresser et mieux valoriser leurs qualifications; elles sont de plus en plus nombreuses à s'implanter dans des secteurs non traditionnels comme l'informatique ou les télécommunications.

**\* Partant de ce constat, il importe d'assurer un soutien significatif à l'entrepreneuriat féminin:**

- L'intervention publique peut jouer un rôle de catalyseur pour stimuler l'entrepreneuriat féminin au moyen de l'octroi de subventions et d'incitations pouvant comporter des conditions fiscales favorables accordées aux créanciers sur les prêts pour création d'entreprise par les femmes (Pays Bas), outre les actions de prospection de marchés et de support marketing et information sur les standards de qualité requis dans les différents segments d'exportation.

- Pour inciter les femmes entrepreneurs à réorienter leur activité dans le sens de la mobilisation des nouvelles opportunités d'exportation, il convient de procéder à l'assouplissement des conditions d'attribution des crédits, à l'allègement des cautions et garanties requises (Canada, Norvège, Finlande et Suède; voir OCDE : Les Femmes entrepreneurs à la tête de PME, op.cit), outre la fourniture de services bancaires de tutorat/conseil et de suivi ultérieur des résultats de l'entreprise.

- La valorisation des compétences féminines exige une orientation plus marquée de l'entrepreneuriat féminin vers de nouveaux créneaux porteurs tels que l'informatique, les télécommunications ou la finance. En vue de favoriser cette démarche, il est nécessaire d'établir, à l'intention des femmes entrepreneurs, des guides, en supports CD-ROM et/ou sur Internet, pour les modalités de création d'une société, pour les modes alternatifs de financement disponibles, et pour les normes et opportunités de commercialisation.

- La promotion de la micro- entreprise, à travers des mesures d'aide à l'installation pour compte propre, comme alternative au salariat, peut freiner la progression rapide du chômage parmi

les Femmes diplômées de l'ES ; elle reste cependant tributaire d'une régulation permanente des dispositifs d'insertion instaurés pour pallier les difficultés et dysfonctionnements opératoires (voir L. Bennour, colloque «Marché du travail et genre dans les pays du Maghreb», Rabat 2003).

- Le degré de féminisation de la profession d'ingénieur a sensiblement progressé, ce qui atteste d'un rattrapage probant pour les Femmes en termes d'encadrement technique. Il importe toutefois de corriger voire sanctionner toute forme de discrimination par genre qui apparaîtraient, lors de l'application, aussi bien dans la phase d'insertion dans le cycle du travail que dans les phases ultérieures de cheminement professionnel (promotion de carrière, nature des responsabilités..) pour consolider cette avancée féminine.

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## IV. Gender and liberalization policies in Egypt

By Heba Nassar

**T**he purpose of this paper is threefold. The first is to study the conceptual framework on economic liberalization policies and gender. The second is to examine the labor force situation of women in Egypt, and the third is to recommend policy measures to absorb the effects of liberalization policies on women.

### Structural and Liberalization Policies in Egypt

The Egyptian government began to liberalize the economy in 1974 with the Open Door Policy encouraging foreign investment to come into the country. After marked improvement in the external resource position in Egypt over the period 1974-1980/81, Egypt entered a critical economic period, when the oil related sources of foreign exchange started to decline. In May 1987 the Egyptian government signed a standby agreement with the IMF and undertook structural adjustment policies (ERSAP) to reduce the budget and the balance of payment deficit and to enhance growth. These measures were accelerated since 1991. These policies are divided into three basic groups, each of which has specific effects on social groups, including women.

- The first group aims at economic stability through decreasing inflation and the deficit in both local and foreign balances. The idea is to reduce the public expenditure through employment policies that reduce the rate of wage growth, and through financial policies that rationalize government expenditure in the service sector (health and education) and reduce the subsidy ratio to total expenditure. These policies aim also to improve public revenues through indirect taxation.
- The second group aims at realizing an economic growth through a number of policies aiming at transferring the public expenditure from the service sectors to the productive sectors and from consumption to investment, by introducing a change in the relative prices of goods and services to the benefit of tradable goods.

- The third group includes policies to realize improvements in the rate of growth of GDP such as trade liberalization policies, reducing government's role in economic activities, improving money and capital markets, establishing a free pricing system, encouraging the market economic system, integration in the world economy, and improving human resources.

Given the above classification it is important to define the nature of the various groups of ERSAP (Per Pinstруп et al., 1989). The policies of the first group would have recessional effects, due to the limitations imposed on the supply of money and the reductions in the government expenditure. All these measures should result into negative effects on real incomes as well as employment opportunities. They also are characterized by recessional effect occurring immediately, given that most of these policies imply procedural policies and as soon as they are undertaken, their effects occur. Therefore, their social impact occurs in the short run.

As for the second and third group of policies, these are of an expansionist nature by transferring the resources from the service sectors to productive sectors, which produce tradable goods. The effects of these policies would occur after a relatively longer period of time. This is due to the significant amount of financial resources needed for this group of policies, the presence of some problems related to the inflexibility of the productive systems, the need for new laws and regulations and the need of highly skilled personnel available.

Also important to understand is the nature of the social impact of these policies. Across countries, the degree of intensity would vary depending on such factors as the size of population, the burden of foreign debt, unemployment rate, dependency rate and the percentage of those who live below the poverty line. Let us consider the case of Egypt. It is characterized by a relatively high population growth rate and high demographic dependency rate (nearly 70 %) and a relatively low labor force participation rate of ( 28 % according to EHDR 2004 and 22 % according to CAPMAS LFSS

2002). Egypt suffers from a relatively high poverty incidence rate (16.7 % according to EHDR 2004; 22 % according to UNDP 2003). Thus, it is expected that the negative social effects of ERSAP in the short run will be intensified.

The percentage of population who lived below the income poverty line with \$1 a day in the period 1990–2002 was 3.1 %, while the percentage who lived with \$2 a day reached 43.9% through the same period. Around 16.7 % of the population lives on the national poverty line (Human Development Report, 2004).

## ERSAP and Gender Segmentation of the Labor Market

With the support of the World Bank and the IMF, Egypt launched the Economic Reform Program and Structural Adjustment in 1991. ERSAP was able to bring macro-economic stability and progress on the structural front, in particular concerning privatization and financial and trade liberalisation. During the 1990s the growth rate accelerated to reach 6% in 1998/99 while inflation fell to less than 4% that year from over 20% at the beginning of the decade. The fiscal balance as well as debt service indicators also improved. GDP per capita rose every year by 4% in PPP terms and 6% in nominal terms during the 1990s and poverty was reduced (from about 19% in 1995/96 to 17% in 1999/00) albeit unevenly. However, at the end of the 1990s a combination of external shocks (downturn in tourism, oil prices, Suez Canal revenues and remittances, spill-over effects from the Asian financial crisis) and policy failures weighed on overall economic developments. In particular, by the late 1990s the fixed exchange rate pegged to the US dollar introduced in 1991 had become unsustainable in the face of insufficient competitiveness improvements. By mid-2000, when the fixed peg was abandoned, the real exchange rate had appreciated by about 30% (European Commission, 2003)

After three years of weak economic performance, buffeted by both external shocks (the Palestinian intifada, September 11, the Iraq war) and an apparent decrease in the vigor of its economic reform program, Egypt's economy staged a modest recovery since early 2003. Official

figures estimated real growth for the fiscal year that ended June 30, 2004 (FY 03/04) at 4.3%, compared with the official figure of 3.2% real growth for FY 02/03 and has been estimated at 5% in 04/05. With annual population growth at just under 2%, that would put real GDP per capita growth at slightly over 2 percent. The economy grew more strongly in FY 03/04 than in the previous three years. The government hoped for 5% real GDP growth in FY 04/05. Using the consumer price index (CPI), the government estimated the inflation rate at 4% for FY 02/03 and a slightly higher 5.5% for calendar year 2003. The wholesale price index (WPI), however, rose 21.4% from April 2003 to April 2004, implying stronger underlying inflationary pressures (U.S. Embassy, 2004).

Women in developing countries in general and in Egypt in particular are considered the first victims as soon as economic changes occur. Macro-economic policies including economic structural adjustment policies concentrate mainly on the reallocation of resources to achieve both stability and growth rather than on micro economic issues and gender differentiation. These policies are male biased as they fail to take into account the specific conditions of women and in particular in the labor market. From our point of view this is the result of a long term neglect of the role of gender in institutional theories about structures of internal labor markets, dual labor markets and labor market segmentation. Labor market theories were developed emphasizing the segmentation of the labor markets by race, color, religion, economic activity, age, geographical location, regulation, educational level, wage system and occupational structure. More recent research has shown how the structure of women's labor force participation differs from that for men. "It differs in terms of distribution by occupation, by sector as well as by work status. In some empirical work it was stated that women are more likely to be secondary workers than men, more likely to be primary subordinate workers and less likely to be independent primary workers such as craft workers, managers, professionals" (Brown et.al. 1987). Internal labor markets treat workers as members of groups and tend to treat workers within these groups differently segregating women and men into different jobs rather than paying them unequally for the same job.

This is what we call *gender segmentation at the national level*. Relevant questions are: Is gender a source of differentiation in the labor market? Does the female labor market have specific characteristics? Is the place of women marginalized? Do the characteristics of unemployed females differ from the characteristics of unemployed men? How much is the contribution of women in unions versus the participation of males? In addition to gender segmentation of the labor market at the national level there is *gender segmentation at the enterprise level*. Men and women might have different labor market experiences within the same institutions although national labor laws treat workers in the same job category equally. According to Barbara Bergman (1995), workers of different gender by similar occupational characteristics might not experience similar earnings or mobility prospects at the enterprise level. She explains that entry-level jobs are likely to be different for men and women so that

“Segregation will be maintained throughout one's career in the firm and women's job ladder may be shorter. Institutionally that type of differentiation could be aided by placing women in job titles that differ from related jobs that men hold. Clerical jobs which are feminized constitute a secondary system with many points of entry, high turnover and low wages in contrast to managerial jobs which are organized along craft or industrial lines”.

This suggests that internal labor markets differ for men and women in spite of legal rights.

In this respect, relevant questions for Egypt are: What is the nature of opportunities for women and what are the factors affecting the job ladder? Are women dominated in occupations structured in a particular way so as to contribute to their low pay and to women's lesser opportunities? What are the specific conditions of women's work? Do we have sex segregation within sectors, occupations and institutions, do women and men have different labor market experiences?

The acceptance of gender segmentation of the labor market highlights three socio-economic factors responsible for the male bias in economic policies and in structural and liberalization policies in particular (Elson, 1991). First is the sexual division of labor. This factor implies that some kind of work is socially constituted as women's work while other kind of work is socially considered as men's work. This is a result of the prevailing pattern

of social values, the division of labor inside the household as well as outside it. The second kind of bias is the non-recognition of unpaid work required for the process of reproduction and maintenance of human resources and the work done by women outside the house to help their husbands, especially in the agricultural sector. The explicit exclusion of this work by different economic policies will lead to the sub-ordination of women to men. The third aspect is that in some cases economic policies are adding to the women's responsibility within the household through the increase in the costs of living without adding to the resources women require to undertake their responsibilities whether in the house or outside. Price liberalization policies and the rise in the cost of living accompanying structural policies in particular lead to the rise of electricity fees and kerosene prices. This will throw an additional burden on working women given her traditional role in the household, while she will be compelled to make savings on help in the housework, whether human or electrical to control the financial obligations of the family, and she is also in need to have a job outside the house to compensate the decrease in the family income.

## Gender Segmentation of the Egyptian Labor Market

Applying the previous analysis to the Egyptian situation and reviewing the literature on the structure of the Egyptian labor market one concludes that gender as well as age have been generally neglected as an aspect for labor segmentation. Type of ownership remained for a long period the most important segmentation factor of the Egyptian labor market due to the extensive size of employees in the government and the public sector in Egypt since the 1960s. In addition with the growth of the private sector since the mid-1970s this factor became more important due to different wage determinations in both sectors as well as different labor skills (Aly, 1994). Meanwhile the classification of the labor market by skills and various occupations is related to the public private segmentation of the economy. Education was also regarded as a critical factor for the division of the labor market in terms of differentiation in wage level, social status as well as fringe benefits. Wage formation has also been considered a segmentation element of the labor market to divide it to four separate interrelated sub markets such as the public sector: government and public enterprises, the urban private sector, the rural non agricultural private sector, the agriculture sector in

the foreign sector. The presence of regulations led to the classification of the economy into regulated and unregulated labor market in order to separate between formal activities in the government, the public sector, the formal private sector, the informal activities in agriculture and the informal sector. A combination of various factors such as economic activity, the type of ownership and presence or absence of regulations led to another division of the Egyptian labor market into agriculture, government, public companies, formal private sector and informal private sector (Aly, 1994).

With the increase in poverty and the improvement in surveys techniques, child work and gender became an important phenomenon as a significant source of the household's income (Nassar, 1995). Meanwhile though many national surveys neglected women's participation or claimed that women are treated by law on equal footing with men, we believe that gender segmentation of the Egyptian labor market exists for the following reasons: gender-neutral socioeconomic factors affecting women's economic participation; the particular characteristics of female employment and unemployment, and a redefinition of economic activities that led to an increase in the economic participation rates of women (Nassar, 1996).

## A General Overview of the Labor Market in Egypt

Though women's labor force participation has its own characteristics it is difficult to separate it from the general employment conditions in Egypt. Egypt's current employment problem is characterized by inadequate labor absorption of graduate students and an underutilization of unskilled human resources. Additional problems are overstaffing in the public sector, coupled with declining real wages and negative implications for employees' productivity (IMF 1995). Several factors have led to the difficult situation in the labor market. First are the structural imbalances and inefficient policy mix in the 1960s. On the supply side various factors contributed to this situation. A population growth rate estimated to be 2.52% percent, 1.92 %, 2.75% and 2% over the periods 1960-66, 1966-76, 1976-1986 and 1980-1993, 1994-2002 respectively, an overall participation rate in the labor force estimated at 47.2%, as well as the substantial increase in the number of graduates of higher educational institutions

On the demand side other factors were relevant. Egypt over the first half of the 1960s witnessed a fairly rapid economic growth in terms of GDP growth rates (6.1 percent) and a decline in the unemployment rate from 2.7 percent in 1960 to 1.15 percent in 1966. However this low rate of unemployment was a result of the government guaranteed employment policies pursued after 1961. These policies led to a sizable increase in the labor force in the public sector as well as the government sector due to the rapid growth of this sector after nationalization and the increase in the numbers of graduates as a result of the expansion in free education policies.

With the implementation of structural adjustment policies the government attempted to reduce the wage bill, which reached 26.1% to total public expenditure in 1986 through the abolishment of employment guarantee policies in the public sector, the slowing down of the rate of growth of nominal wages and the reduction of real wages for government and public sector employees. Other means were adopted to decrease the size of employees that reached 2.3 million in 1986/87 such as extending the waiting period for guaranteed jobs offered to secondary and post secondary graduates and introducing many complications in the application procedures for employment in the government like the condition of yearly registration in the labor offices to obtain a job during long waiting periods that range from 5-9 years (World Bank, 1991). All these measures aggravated the employment problem in Egypt and unemployment rate reached 10.9% in 2004 (EHDR 2004).

The second factor is the inefficient pattern of growth policies in the 1970s and 1980s accompanied by high unemployment rates. In the 1960s Egypt followed state-directed development, which emphasized growth in a few sectors (industry) and a few geographical regions (Alexandria and Cairo) based on the assumption that development efforts would trickle down to the whole economy. The implications of this policy were the following:

- A low labor-absorption capacity in the industrial sector estimated at 12% due to increasing capital intensity protected by import substitution policies. In general labor growth rate in this sector was estimated at 0.5% over the 1970s through the 1990s.

- The creation of push factors in rural areas through a strict quota system, fixed prices of input and output and a biased investment policy that led to the decline in real per capita income of rural workers in comparison led to a decline in the labor absorption capacity in the agriculture sector from 52.8% over the period 1959/60-65/66 to 34.4% over the period 1986/87-1991/1992 and to 27% in 2004 (CAPMAS, LFSS 2004). The construction sector, which absorbed much labor in the 1970s, shows a relatively low rate of growth in employment estimated at 1.5% over the period 1990-01. The public sector, an absorber of a large share of labor, witnessed a negative increase in employment due to the contraction of this sector over the period 1990-2001.

- Due to the decline in the growth rates of productive sectors during the 1970s, the main labor-absorption sectors were the untradeable sector and the construction sector. Two unplanned mechanisms were developed to absorb the surplus labor: The growth of the informal sector in urban areas and external migration to the oil rich economies, were regarded as an unplanned (informal) institutional setup successfully absorbing the excess supply of labor force. The informal sector has been estimated at over 40% of total employment, and therefore about 65% of private sector employment (Nassar, 2001)

This situation led to several challenges. First, the labor force grew at a rate, estimated at 3% during the period 1990-2000, faster than the population growth rate (2.2%), and a relatively low GDP growth rate (3.4% in 2000-01). In addition there is an annual increase of graduate job applicants. The number of graduates in 1999/2000 was around 800,000, while job vacancies were only 150,000 due to the shrinking public sector labor market as a result of privatization, and the inability of the formal private sector to provide the needed number of employment opportunities. GDP, estimated at 3.8% on average during the period 1995/96-01/02, implies that once productivity improvements are taken into account, overall GDP should reach 6%-7% to keep pace with the employment growth rate, which might reach 4% in the coming decade taking into account an increase in female participation rates with the expansion in education.

Second, there is the problem of the mismatch between labor market requirements and educational output. The education-employment nexus is probably the most crucial aspect of a human resource development strategy for Egypt. High quality education is a necessity for globalization in any resource poor country. However, education alone is still inadequate at present due to the low quality of acquired skills. Large-scale open unemployment and low labor productivity are major causes of low economic output and productivity, representing the main challenges facing globalization and liberalization of the economy.

Third there is the problem of high unemployment rate and persistent under-employment.

Unemployment is estimated at 10.9%. Almost 60% of the unemployed in Egypt are new entrants to the labor force. Unemployed males without previous work experience are almost entirely under the age of 30. The profile of the currently unemployed differs significantly from that of workers who are likely to be displaced by economic reforms and will become public employees. As part of the structural adjustment program, the Egyptian government has established very ambitious targets for privatization. It is widely believed that privatization offers the only opportunity to increase the efficiency of previously state-owned enterprises. However, privatization raises the problem of excess labor in public enterprises. Workers in these establishments may be at great risk of job displacement, as labor redundancy within state-owned enterprises is considered one of the most serious challenges facing the privatization program. Privatization often involves the offer of early retirement schemes, which often lead to an increase in the number of unemployed in particular for women. However, opportunities exist for retraining, for redeployment or for starting self-employment, which might in fact lead to increasing numbers of job seekers in the labor market. These workers will be older than the new entrants to the work force and have more financial responsibilities towards their dependents. In addition, underemployment in governmental entities has been considered an important feature of public institutions requiring major administrative reforms

Fourth, there are demand/ supply imbalances. In spite of the high unemployment rates, labor market analysts report that there are still shortages of skilled labor, which is indicated by the increase in the real wage in the private sector for this category of workers. However, this index in the private sector clearly indicates the shortage of skilled workers and the oversupply of unskilled workers in the labor market. The behavior of the wages in the public sector does not respond to market forces and cannot be regarded as a reflection of supply and demand.

It is important to note that all previously mentioned labor market conditions affected the conditions of women in the labor market in Egypt. On the supply side the participation rates of females in the labor force increased in accordance to the Census data from 4.8% in 1960 to 22% in 1996. It reached 28% according to the Egypt Human Development Report of 2004. On the demand side females as all other members in the society were affected by the low absorptive capacity of the industrial sector. With the general overstaffing in the service sector the majority of females working in the formal sector were mainly absorbed in this sector. Meanwhile due to the massive migration of peasants over the 1970s to the Gulf countries and the increase in the real wages of agricultural workers a significant proportion of women in rural areas replaced men in work. The economic conditions in Egypt since the 1980s led to curtailed job opportunities in paid employment and opened up self-employment activities especially as street vendors, in petty commodity production as well as personal services. These activities were regarded by a significant number of women as important means to increase their incomes. In addition migration was a resort for some professional women as teachers. Other factors contributed to the increase in the participation rates of females in economic activities such as the imbalance of the sex ratio connected with external migration of men, high numbers of female-headed households, mortality patterns in which females outlive males (72 for females and 70 for males (Human Development Report, 2004).

However the visible improvement in females' participation in the labor market masks a fundamental reality: socioeconomic conditions continue to restrict women's participation in the economy, limit their mobility and ignore the negative effects of the economic policies on women, growing unemployment, declining real wages, unsatisfactory working conditions in the private sector, persistent occupational segregation, discrimination in promotional procedures,

duality in role performance as well as underestimation of their contribution in the labor market. All these factors intensify the negative effects of ERSAP on women in the labor market.

### Women's Participation in the Egyptian Labor Market

Data on female's contribution to economic activities suffered for a long time from an obvious underreporting so that the rate of participation of women in the labor force was 8 per cent in 1976 and increased to 10 per cent in 1986 and reached 28 % according to the Egypt Human Development Report of 2004. These low figures for female participation were the result of several factors (Anker et.al., 1989). One was the reliance on precise words or phrases such as "main activity, work and occupation" which resulted in ambiguity for respondents. An activity schedule was not used. A second was the neglect of females' activities in rural areas as active work. Another was the non-specification in the questionnaires of different types of activities that women perform. Finally, various labor force definitions were not used to overcome the shortcomings of a single labor force definition. Substantial increases in female employment occurred after 1983 with the redefinition of economically active person to include activities in the formal as well as the informal sector. These changes led to an increase in the proportion of working females to total labor force aged 12-64 years from 7 per cent in the 1975 labor force sample survey (LFSS) to 18.7 per cent in the 1984 LFSS. The CAPMAS labor force survey of 1994 indicated a figure of 14.1 per cent for female participation in the labor force.

Three national surveys enlarged the concept of women's contribution to economic activities and indicated a relatively high level for female economic contribution in Egypt. The CAPMAS Labor Force Information System Project (LFIS) in 1988, which was a special round of the labor force sample survey showed a higher economic participation rate for women than previous labor force surveys (31 per cent). This figure is the result of the global definition of work used in this survey, sampling and technique of data collection. The definition of females' work was in accordance with international trends broadened to include paid and unpaid work, so that women, who were employed for at least one hour during the reference week of the survey at the formal or informal basis were included in the labor force. In addition activities

such as producing and processing primary commodities in agriculture, forestry, hunting, mining and quarrying were included, whether for personal or marketing reasons. Meanwhile production in the non-primary sectors for market purposes were included (Za'alouk, 1991).

In addition the survey of the Cairo Demographic Center in 1993 on a subsample of 1,900 individual questionnaires from 9,700 individual questionnaires (Egypt Use Effectiveness of Contraceptives Survey 1991) that was analyzed by the Arab League Population Office gave another figure for women's economic contribution. Data were collected in time distribution schedules for ever married women aged 15-49 years on the time and days spent in work outside, inside as well as time spent caring for the family. Rate of females' participation in economic activities was 21.1 per cent for a reference period of one week (El Sayed et al, 1995). This figure is similar to the estimation of females participation rate in the labor force in the latest projections on long-term demographic trend in Egypt (Shi A.ed.1996). Meanwhile the Human Development Reports of Egypt, 1994 and 1995, gave two contradictory figures which we cannot adopt as they do not have a justification (29 per cent for 1994 and 10 per cent for 1995). This survey depended on the methodology of "allocation of time" in measuring the contribution of females in economic activities and provided us with different estimates for the measurement of economic contribution of females in Egypt. Depending only on paid work the percentage of working females reached 11.3 percent from total labor force. Extending the definition of work to include paid and unpaid job the last percentage reached 21.1 percent. But taking all activities into consideration, including domestic activities, the participation rate of females in economic activities reached 70%.

The Labor Market Survey 1998 took subsistence agriculture into consideration in economic activities, the Egyptian labor force was estimated to have grown at an average rate of 2.7% per year over the period 1988-1998, higher than the estimated population growth rate over the same period (2.2%). In accordance to the latter definition, employment growth in Egypt was estimated to have reached 4.3 million in the period 1988-1998 increasing from 15.7 million in 1988 to 20 million in 1998, much higher than the official estimated figure for the labor force (Asaad, 1999) and female participation rate was estimated at 45%.

## How Will ERSAP Affect Women's Employment in Egypt?

The withdrawal of the government from the employment process and the shrinking of job opportunities in the public sector as well as privatization will affect women in particular. This is due to several reasons related to the gender segmentation of the labor market. First is Occupational Gender Segregation. Women are squeezed in a limited number of occupations in the lower as well as the highest level of the occupational ladder. More than a third of the employed females are working as agricultural workers, about 22.4 % as professionals, managers and 16.7 % in technical occupations and only 1.3 percent as production workers and 7.8 percent as sales workers. This reflects the educational status of working females. Despite the fact that most working females in the informal sector are illiterate (43.9 percent), most educated working females have secondary or university education (44 percent CAPMAS, LFSS 2001). The men's occupational structure is more evenly distributed. A third is working in agricultural occupations, about 11.3 % in legislative and managerial, 12.7 % as professional and 7.6 % in technical occupations and 4.6 as craft workers, 10.5% as sales workers as well as plant and machine operators. The relatively high percentage of women clericals, professionals and farmers indicate the vulnerability of females with respect to privatization policies as underemployment is spread among all these categories and skills are not matching the labor market requirements. However Table 1 shows an improvement in the occupational skills of women in 2001 in comparison to 1984 as the percentage of professional and technical women increased from 18% to 40% of total occupations held by females.

**Table 1 : Occupational Structure by Gender**

Occupation	1984 (12-64) %		2001 (10-64 year)%	
	Women	Men	Women	Men
Professional and technical	18	10	40	20
Executive	2	3	5	11
Clerical	13	8	10	5
Marketing	9	14	8	11
Agriculture and Hunting	41	37	31	27
Skilled and unskilled labour	7	25	7	26
Unidentified	10	3	-	-
Total	100	100	100	100

Distribution of females by economic sector reflects the previous occupational structure of working females. More than half the females are absorbed in the service sector in its broader definition (education, public defense, health and social work, and wholesale/retail trade) and second comes the agricultural sector as a main absorbing sector. For males the picture is somewhat different where the agricultural sector comes at first place, second comes the service sector while their share in the manufacturing sector, construction, transportation storage and communication sectors are relatively more than the similar figures for females. No doubt women in the formal service sector are facing the consequences of restructuring policies, while they are not equipped with the talents needed for the promising new occupations in the service sector in finance and tourism.

This kind of occupational segregation is a result of the sexual division of labor. The gender bias in the labor market is reflected on the specific occupations in which females are engaged, which are best suited to their social and reproductive role in the society. Females do not penetrate economic activities designed for men such as construction and mining. They are usually assigned to inferior or secondary roles as clericals. Occupational segregation of men and women declined somewhat during the 1970s as a result of the entry of more women into the so-called male occupations (for ex. male managerial and professional jobs). This trend had its roots in the 1960s when the economy began to diversify and females began to enter nonagricultural occupations such as manufacturing, tourism, commerce and government services. There is currently a gender-biased professionalism in Egypt. Some professional occupations are dominated by females. Social services, teaching, nursing and medical services employ women more than other fields. Females' graduates are estimated by almost 60 percent of the graduates of faculties of medicine pharmacy and dentistry (Nassar, 2004).

In the manufacturing sector women still constitute a limited share. This might be also explained by their low representation in vocational educational. Women working in manufacturing are concentrated in labor-intensive industries such as textiles and garments, food processing and pharmaceutical. The service sector is the

destination for a significant share of females. However their absorption in the different service occupations is different. Females are concentrated in social services with very low representation in transportation and communication services. Their presentation is relatively better in commerce, hotels and restaurants services but still lower than the share of men in these services. No significant differences exist in the occupation rates of both sexes in finance and banking (CAPMAS LFSS, 2002).

Due to the absence of the principle of equal opportunities for men and women, women tend usually to work in the clerical and administrative work, which is already saturated. These activities are the most vulnerable occupations when privatization is implemented and excluded. Moreover gendering of agriculture appears to be a function of strength and men's dominance (Toth, 1991). Females in the agricultural sector were always responding to the demand of culture, unequal wages or emerging conditions. Culturally there is a strict boundary between men's and women's work in agriculture. In addition females in this sector were always responding to the circumstances that men face. During the oil boom the relative decrease in the number of men employed in agriculture has resulted in the replacement by women and children. When men returned, females were withdrawn from various job opportunities. Substitution of women for men is encouraged by the desire to reduce costs. Female's engagement in agriculture was always regarded as part of their role as housewives and for long periods it was not accounted as economic activity. In this sector the basic problem facing women, is not relevant to lack of work opportunities, but to the fact that they are working all the time without any financial evaluation of their participation to this sector (Nassar 1999). Moreover as women were always subordinated to men in this sector, the changes in the agricultural laws have been affecting women in particular.

### Women's Employment in the Government Sector

Policies aiming to eliminate overstaffing in the government sector will be affecting women more than men due to what Moghadam (1998) has observed to be a feminization of the government sector. Most job opportunities for females in the

formal sector have concentrated in the government and to some extent in the public sector if compared with the male labor market. The percentage of working females (41.9 percent) in this sector to total female labor force exceeds that for males (24.5 per cent). The equal opportunity environment prevailing in the government sector has resulted in some progress for women in access to senior positions. One-fourth of women in the government sector lack qualifications; most have above intermediate education, though relatively few are in high administrative positions. The same educational pattern for females in the government sector can be seen in the public sector. Women have made significant advances in the government sector compared with the private sector like secure wage setting, equal regulations and comfortable working hours. However currently females in the public sector face the following problems: First there has been a deterioration in the status of government employees as real wages declined by 51 percent over the period 1986 till 1993 (Nassar, 1995). Second privatization is a current process that might have negative effects on the working females in the public sector. Among public sector redundancies the percentage of females is high. Women as mentioned previously tend usually to work in the clerical, secretarial and administrative work, which is already saturated. In the case of dismissal they will be the first to leave, as working conditions in the private sector are unsuitable for most married females. Meanwhile division of labor according to gender i.e. jobs for women and jobs for men will render the vocational training process, which accompany the process of labor dismissal, more suitable for men than for women. Moreover their household maintenance and childcare responsibilities affect their productivity and result in persistent barriers against the engagement of females in the private sector. In the Egyptian privatization case more women accept early retirement than men.

Table 2 shows that there is no substantial increase in the percentage of females working in the private industrial sector over the period 1992-1998.

**Table 2 : % of working females in the private industrial sector in 1992 and 1998 total female labor force**

Economic activity	Female percent Total	
	1992	1998
	Females	Total
Mining	5,8	7,5
Food products and beverages industry	9,6	9,7
Tobacco products industry	55,3	48,3
Clothes industry	19,6	17,6
Clothes and preparing	52,4	54
leather preparing	17	16,8
Wood and Wood products industry	3,2	1,7
Paper products industry	14,6	9,1
Printing and Publishing	7,9	7,3
Coal and oil products industry	9,5	36,2
Chemical product industry	23,2	15,4
Rapper product industry	16,6	9,2
Non fire Metal product industry	7,5	6,3
Metal and formed Metal product industry	1,1	4,3
Machines and equipments industry	7,2	4,3
Electronic machines industry	5,6	16,2
Electric sets & radio & TV & communication machines industry	11,5	11,7
Medical sets & measurement sets industry	20,3	16,9
Engine vehicules & other vehicules industry	4,8	2
Furniture & wood products industry	3,4	4
Non classified products industry	15,2	19,3
Total	15,6	15,8

Hence the relatively high proportion of females working in the private sector to total working females is a result of the increase in the engagement of females in the informal sector (33.7 % in private sector outside enterprises compared to 19.9% inside enterprises 2001). As previously indicated this sector served as an unplanned mechanism to absorb surplus labor force in general. For illiterate females it is the most suitable sector and for educated females it could be a resort enabling them to increase their incomes with no fixed working hours.

Working conditions in the informal sector are poor; there is absence of social insurance, long working hours and absence of minimal sanitary and safety regulations. Females in the informal sector, similar to all other workers in this sector, do not have any trade unions or legal protection and do not enjoy any labor rights such as paid holidays, fixed working hours or health care. Given that most of the workers in this sector are illiterates with no training or work experience they may be subject to exploitation.

Women when they resort to this sector it is due to either shrinking job opportunities in the formal sector, unsuitable working conditions or need for extra payment.

## Stability and Women's Work

Transitory employment and change in the work status accompanying ERSAP as a solution for overstaffing is unsuitable for the nature of female work that is in favor of permanent jobs. The high percentage of working women in permanent jobs to total working females represents two factors: A relatively higher percentage of females work as employees rather than men and a lower percentage is working on their own account. In addition females by nature need protection and stability, which is offered to them in permanent work. Questions of mobility were addressed only in the Labor Force Sample Survey in 1988 and it was clear that females are more reluctant than men for changing their employment status. Reasons for changing their employment status were family conditions and not personal aspirations like the case for men. Wage workers increased in this survey from 7 percent in 1973 to 20.7 percent in 1988 indicating that some females left the private sector to the government sector seeking stability and security i.e. their mobility was a search for more stability (Za'alouk, 1991). What is more telling is that the duration of stability in work is longer for a relatively higher percentage of females to total working females than that for males. The relatively high percentage of females in seasonal and temporary economic activities is correlated with their extensive engagement in agricultural activities.

Finally women are less able than men to work in more than one job. Only 11.5 percent of working females work in more than one job in comparison to 21.9 percent of men. Their responsibilities at home are obstacles against increasing their livelihood sources, which is not the case for men. This means women are rather more likely to lose their single source of income than men.

## Impact of Unemployment on Women

Although unemployment is a common problem affecting every individual member of the society, who needs and is able to work, its impact on women is more intensive due to the fact that women are more vulnerable in the labor market. Unemployment rate for females increased from 17 percent in census 1976 to 23 percent in census 1996 (EHDR, 2004). The supply of job seeking

females is growing and female labor demand remains limited. This could be a result of a gender bias in the search of jobs in the labor market. One of the field surveys quoted a man saying: "No woman will be employed and if her husband does not find a job, he should replace her" (El Masry, 1993). In another interesting quotation it was mentioned "Egyptian women have become the redundant bargaining chip in the political triangle involving their rights, state policies, and the pressure of conservative elements that blame working women for the country's unemployment problems" (Peter, 1995).

The duration of the unemployment is longer for females than for males. It reaches three years and above for 43.1 percent for the unemployed females and 36.4 percent for unemployed males, while it is less than 12 months for 20.9 percent of the females and 28.1 percent of the unemployed males. This reflects the continuum of female's work that can be interrupted for years by maternity responsibilities. It also indicates the impact of the dual role of females on their status in the labor market. Females might be enforced to leave their jobs to undertake their family responsibilities, which is not the case for men.

However due to the tight conditions of the labor market as well as privatization the reentry in the labor market becomes a difficult task and in particular for females who were working in the public sector and have now to face the competitive conditions of work in the private sector while their responsibilities at home increased with getting children. Employers are more likely to offer jobs for males rather than for females due to the extensive maternity leaves granted for females. Another problem is that the length of unemployment might affect the accumulation of talents so that a female who stayed at home for five years to raise her children will be an inefficient worker in the labor market.

Unemployment falls heavily on the new graduates and new entrants in the labor market. This is more apparent for females rather than for males as 98.6 percent of the females did not have any work experience while this ratio declines to 90.7 percent for men. The distribution of unemployed persons by occupational structure shows significant differences among both sectors. For females the highest percentage of unemployed is among service and sales workers followed by professionals, craft and trade workers as well as clericals. It means that the main absorbing occupations of females are saturated and are starting

to release workers. As females in these occupations are performing a repetitive work they might be easily withdrawn from their work.

The highest ratio for unemployed males is for those, who were working as craft and trade workers followed by those in elementary occupations, service and sales workers. Women in agriculture rarely suffer from unemployment as they are performing complementary jobs to their housework. Women in hotels, personal and social services as well as manufacturing have the highest unemployment rates. As work in the government is more stable than work in the private sector a relatively higher percentage of unemployed females were working in the private sector. The tendency that the private sector is a pushing sector for employed females can be depicted by comparing both previous measures. Almost half of the unemployed females are not searching for a job. Though they are willing to work their chances for searching a suitable job is limited either by their parents or by their families or by their ignorance of various ways to get a job. Females prefer to wait for their employment opportunity in the government sector. As work of men is usually regarded a necessity at the society and at the household level a relatively higher percentage of unemployed men than unemployed females is searching for a job. In addition a higher percentage of males to total unemployed men is applying for work or going to contractors and using market spots while a higher percentage of unemployed females to total unemployed females is waiting for employment by the employment authority office indicating the negative position of females in the labor market. However as men are searching for work a higher percentage of them face the fact of unavailability of suitable job opportunities in the Egyptian labor market.

**Table 3 : Unemployment Rate by gender and region 2001**

Years	Total		Urban		Rural	
	Women	Men	Women	Men	Women	Men
1984	11	5	17		5	3
1990	15	6	25	7	9	5
1993	22	7	28	8	18	7
1995	24	7	28	8	21	7
1997	20	5	21	6	19	5
1998	20	5	20	5	20	5
1999	20	6	19	5	19	5
2000	23	5	24	5	22	5
2001	23	6	23	6	22	6

**Table 4 : Unemployment status by educational status and gender in Egypt (2001) (Hundreds / Percentage)**

Education status	Male		Female	
	Figures in Hundreds	%	Figures in Hundreds	%
Illiteracy	85	1	27	0,3
Read and Write	118	1,4	93	1
Under Intermediate	166	1,9	82	0,9
Intermediate	5595	65,4	6794	72,9
Upper Intermediate and Below University	493	5,7	587	6,3
University and above	2101	24,6	1734	18,6
Unidentified	0	0	0	0
Total	8558	100	9317	100

Source: CAPMAS , Labor Force Sample Survey , 2001

To conclude, the impact of unemployment is relatively stronger on women as unemployment rates are higher, unemployment periods are longer for females and women are reluctant to search for jobs. They can wait years to be employed by the employment authority agency, which provides them with the permanent secure jobs they need. As long as this process is undergoing a structural change to free the market women will be left with no jobs.

### Vulnerability of Women in the Labor Market

The negative impact of ERSAP on women's employment will be intensified, leading to vulnerability of women in the labor market, due to several factors. The first pertains to women as family workers. Unpaid work as well as paid employment in the government is relatively rather more visible among working females than men, while self employment is relatively more apparent among working males. Females are the most vulnerable group as about 17 % of them is unpaid in comparison to 7.6 per cent for men. The percentage of men to total working men in self employment (31.6 percent) is higher than that of females (18.2 per cent) whether employing others or with no employees. Moreover work belonging to an establishment is an indicator of socioeconomic development and better working conditions and protection for the labor

force in general by law. The percentage of females working in an establishment (19.9 percent) is less than the percentage of men working in an establishment (25.5 percent), which means a relatively higher percentage of working females is uncovered by social insurance. This might be explained by the relatively higher percentage of men engaged in the organized manufacturing sector and the relatively high percentage of the unpaid working females. Despite the fact that this category might not be influenced by ERSAP, the number of entrants in this category will increase with privatization. This will lead to more vulnerability for women in the labor force.

A second factor is wage discrimination. Women in manufacturing as well as agriculture occupations are performing repetitive tasks. They are located at the bottom of the hierarchy levels and rarely become supervisors. Lack of education and the inferior status in the labor market results in limited access to technical vocational and entrepreneurial training and reduce their chances to be engaged in more capital intensive industries with higher salaries. For these reasons women's wages are far below men's in the same industrial branch. Women's wages are about two-thirds those of men. It is important to mention that this does not reflect inequities in the setting of wages as the manufacturing sector is still dominated by public enterprises, which face uniform wage setting for both sexes. The clarification for these inequities is different entry jobs for both sexes, different promotional chances and limited chances for vocational training as well as the resistance of females to work overtime restricted by their parents or their household requirements. In the public industrial sector only 5 percent and 7 percent of the working females in the textile and food industries, respectively, could reach the highest administrative positions. For the public sector as a whole, 0.57 percent of working females (vs. 0.98 percent of working males) could climb the occupational ladder (Alliance for Arab Women, 1995). Even in the service sector and in teaching occupations in which a significant proportion of the females is engaged their share in administrative jobs is far below their share in employment in these occupations. In primary education, preparatory, agricultural schools and teachers schools the share of females in employment reaches 51.76 percent, 44.04 percent, 23.38 percent and 49.1 percent of total employment and their share in administrative

occupations is 33.75 percent, 26.48 percent, 5.73 percent and 37.05 percent, respectively (Alliance of Arab Women Report, 1995). This kind of discrimination might be intensified with ERSAP as women will not be able to compete with men in administrative positions of the private sector.

A third factor is discriminatory employment conditions. The Labor Force Information Project indicated that females face different kinds of discrimination such as: ill-treatment by male colleagues, directors, supervisors and employees (41.7 per cent), harassment by the public not treating women well (32.8 per cent), sexual harassment (65 percent), discrimination against women (5.4 percent), absence of transport facilities (4.7 percent), problems of young children left alone and housework (4.7 percent), requiring favors from women that are not part of their formal recognized job (2 per cent), gossip (1.3 percent) (Za'louk, 1991). Moreover the aforementioned study indicated also different forms of job discrimination against working women with respect to promotion, appointment, wages, bonuses, types of work, attaining high ranking posts, chances to travel abroad, favors asked of women on the job. In rural areas discrimination in wages ranks highest and the incomes followed by the type of work given to the females. In the government the most important form of discrimination considers traveling abroad, followed by attaining high ranking posts and third the type of work given to women. In the public sector appointment is the form of discrimination number one followed by the type of work and then travel abroad. In the private sector the most important form of discrimination is the type of work given to women, followed by wages and thirdly favors asked of women (Za'louk 1991).

We should also consider labor laws and representation of women in the Egyptian trade unions. Despite the fact that the Egyptian labor law is equitable and favorable to women it might lead to unfavorable employers perceptions against women's work in particular for the private investor. Women are considered "expensive workers" for employers, due to provisions for maternity leaves, childcare centers and nursing breaks in the government and public sector (Moghadam, 1998). "Women workers are entitled to three months paid maternity leave

and up to two years unpaid maternity leave available up to three times" (New Labor Law, 2004). Though it is in favor for women it may lead to discrimination against women in the labor market. Employers are opposing lengthy maternity leaves. In our analysis for job advertisement we found that 64 percent of the private sector's advertisement in May 2004 was for males (*Al Ahrām*, May 2004). "The new Labor Law also requires employers having 100 or more female employees to set up a nursery close to the workshops far from noise, pollution, wastes and to allow for breastfeeding twice a day for not less than one half hour" (New Labor Law, 2004).

Labor legislation protects women from hazardous work as well as night work. Even when nights are allowed, as in the tourism sector, the law requires provision of transportation for women after 8 p.m. This law excludes tourism and health related activities but requires the jobs to provide them with transportation (Labor Law, 2004).

However the data show that implementation is lagging behind regulations. Women who enjoy the service of transportation in their work do not exceed 17.3 percent, 68.1 percent and 9.4 percent in the government, public and private sectors, respectively, in urban areas and 3 percent, 31.2 percent and 14.7 percent, respectively, in rural areas (Za'alouk, 1991). Moreover the Arab League & CDC Survey indicated that 55.4 percent and 42.3 percent of the working females in urban and rural areas need an hour to two hours to reach their work (El Sayed et.al., 1995). As some work in rural areas takes place in other villages like selling products in the Markaz or working as hired agricultural labor force in other villages 9.8 percent of working females in these areas need more than two hours to reach their work versus 4.1 per cent for working females in urban areas. Due to the precarious and strenuous position of women in the labor force as a result of role conflicting we believe that this represents a burden for working married females.

The new employment law has given the right of collective bargaining to workers. Women as a minority in trade unions are in a less favorable position. Women representation in trade unions is still limited to ordinary positions and to working females in the formal sector. Female officers are

represented in all 23 unions of the Trade Union Federation. However they constitute 3.4 percent from all officers (621 females compared with 17,441 males in the trade unions). In only 4 of the 23 trade unions women reached a leading position. This means that only four women in comparison to 479 men are in the general unions i.e. 0.8 percent. Most women union officers were in public services (94) education (55) commerce (42) public utilities (38), tourism and hotels (37) (Abdel Hady, 1996). Just one single woman is in the Executive Board for the Federation of the Trade Unions of Egypt, while 22 men are members of it. Despite the fact that the Trade Union has a Women's Unit it is important to note that the legal rights of working women may not be interpreted from a women's perspective. For example women may not always obtain union support in combating such problems such as occupation segregation and role conflicting. Moreover trade union representation is not even available for most women for domestic servants, for women traders or generally for women operating in the informal sector. There are no associations of women workers taking care of females in the informal and agricultural sectors (Moghadam, 1998)

### Poverty, Role Conflicting and Need to Work

The status of female-headed households in Egypt illustrates women's vulnerability to poverty. Female-headed households in Egypt are estimated to make up about 22% of households. Most studies on female-headed households have found that employment is a mechanism for coping with household poverty and with the increasing cost of living (see [www.aucegypt.edu/src/wsite1](http://www.aucegypt.edu/src/wsite1)). The trend in poverty discussed earlier in the paper was accompanied with an increase in the prices of food, electricity and transportation due to the reduction in subsidies led to an increase the cost of living and no poor women could afford to stay at home. Work is not to achieve self-dependence but rather enforced due to economic reasons and led to role conflicting. The need for a steady flow of an income as a buttress against insecurity of unemployment and inadequate or nonexistent financial support from male partners and kin networks was

a major factor pushing women to develop a variety of strategies to increase their incomes. Moreover early motherhood resulted in many women who are compelled to seek income because they have to support their children. Strategies to improve the livelihood are similar among poor classes. Strategies ranked from seeking employment, taking an extra job producing home handicrafts for sale and networking among kin and friends to obtain extra money. As most female-headed households are poor and uneducated they were absorbed in the informal sector with no protection and significant wage differences (El Solh1994).

## Conclusions

The implications of ERSAP on women's employment in Egypt cannot be separated from the prevailing social norms and existing socio-economic policies in Egypt. It reflects women's vulnerability in general, the sexual division of labor, the neglect of unpaid domestic work and the neglect of unpaid work outside as well as inside the house in general. Women's vulnerability is reflected on the specific occupations females are engaged in which are suited to their reproductive role in the society like teaching and nursing in general. Their presence in agricultural work is part of their responsibilities at home, which are unpaid while the informal sector is the last resort for the illiterates and those who are enforced to work by economic conditions. Similarly, the problems of female employment cannot be separated from the general labor market conditions.

More research is needed to assess the gender impact of liberalization policies in Egypt beyond what this paper has offered. But to improve women's positions in the labor market, we can suggest several measures. One is to conduct periodic gender-sensitive surveys. Another is to provide female workers with training programs. The delivery of assets to the poor is also important. Credits for the female poor are effective measures to enable them to obtain the needed assets. Mobile credit offices especially in rural areas are efficient means to lower transaction costs. Group lending may be a solution of lack of collateral in addition to

simplified application procedures for obtaining a credit. Hiring staff from client communities facilitates the communication with the borrowing community. Additional effective measurement are short loan terms, the extension of very small loans to meet day to day financial requirements of women's business, full repayment of one loan brings access to another, limitation of time between application and disbursement and the development of a public image that credits are for the poor (World Bank, 1994). Credit cooperatives provide women with the necessary capital, producer cooperatives help women to get better prices for their goods and legal services enable women in the informal sector to have legal benefits.

Last but not least, we need to raise awareness of the importance of women's contribution in economic activities. Productive employment for females should not be only regarded as a condition for the survival of their households like the unpaid work that most women undertake in rural areas, but rather as an addition to the role of women to raise their status in the society. Only if the women's role in increasing the welfare of their families will be recognized the society will be ready to protect them during socioeconomic policy changes.

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# V. Gender aspects of privatization: a case study of female tobacco workers in Turkey,

By Gulay Gunluk-Senesen, Ozgun Akduran

## 1-Introduction

This paper is an attempt to study the gender impacts of privatization in Turkey, incorporating both macro and micro levels. The starting point is an outline of impacts on female employment in general. Interviews with the displaced female workers in a case study of displaced female tobacco workers are used to reveal the human source aspect of privatization from a gender perspective.

The last decade has witnessed the rise of the feminist critique of macroeconomics. Engendering of macroeconomics has evolved on two different schools of thought: individualistic micro-foundations of macroeconomics and gendered structural approaches. By incorporating gender as a social institution, the latter approach provides a useful tool for our analysis. It is thus possible to conduct a critical assessment of macroeconomic policy design and implementation, focusing on their likely and observed impacts on women. (e.g. see Beneria, 2003, pp.74-83; Dawson, 2000; Dijkstra and Plantenga, 1997; Ferber and Nelson, 1993; Gutierrez, 2003; Himmelweit, 2002; Nelson, 1996; Strober, 1994). These impacts at macro level involve especially accounting for women's unpaid domestic labor. Impacts at meso level are relevant in our case in the context of access to public services. Finally, impacts at micro level incorporate asymmetries in the decision making for and distribution of household resources.

With this perspective, the almost global design of neo-liberal macroeconomic policies emerges as a recent challenging area of analysis with regard to their outcomes. These policies are hardly gender-neutral starting from the construction stage and extending to the implementation stage. Making gender impacts visible poses yet a further challenge as it requires grounded observations.

The paper is organized as follows. In the next section, a general assessment of liberalization policies is made based on previous research from a gender perspective. In section 3, an overview of structural adjustment programs in Turkey are made with reference to labor impacts in general. Section 4 presents available evidence on the gender aspects

of privatization inherent in structural adjustment programs in Turkey. Section V introduces the labor aspects of privatization of TEKEL, a Turkish state economic enterprise specialized in alcoholic beverages, cigarettes and tobacco production. The experience of privatization of TEKEL leaf tobacco establishments is outlined in Section 6 with special reference to gender aspects. Channels through which females are affected following privatization of leaf tobacco establishments are analyzed in Section 7 based on interviews with displaced female workers. Finally, Section 8 provides an overall assessment of the findings.

## 2-Gender aspects of market liberalization

Implementation of the neo-liberal macroeconomic policy in the form of structural adjustment programs has been the dominating practice of the last two decades in peripheral/developing countries (east Europe, Middle East, Asia, Africa, Latin America) in economic crisis. Faced with pressing bottlenecks in financing public sector deficits, current account deficits and in some cases external debt liabilities, these countries complied with the requirements of the World Bank and International Monetary Fund towards resolution (Beneria, 2000; Elson, 1992; Stewart, 1992). At the core of these programs stands liberalization of the market. The guiding justification has been elimination of inefficiencies created by public intervention in the economy and of barriers for integration with the rest of the world, for globalization in short. Although these policies involve a medium to long-term scope for restructuring the whole economy and thus foreign trade (mainly imports) and financial liberalization as well as privatization of public enterprises is a gradual process, yet introduction of initial steps involve shock measures. In this respect, identifying women as the shock absorbers of structural adjustment programs is an outcome of research on these policies from a gender perspective (Cagatay, 2003; Elson, 1992; Vickers, 1991).

The wide range of policy areas that structural adjustment programs cover obviously implies that channels through which women's lives are affected are manifold (Beneria, 2000; 2003 pp.48-56; Berik, 2000; Elson, 1992; Gideon 2003; Grynspan, 2003; Sosin and Rives, 2000). Some of them in the

context of export promotion are revealed by country case studies. (e.g. see Alarcon-Gonzales and McKinley (1999) for Mexico, Baslevant and Onaran (2004), Cagatay and Berik (1991, 1994) for Turkey; Kabeer (2004) for Bangladesh; Stewart (1992) and Vickers (1991) for South-East Asia.) The main target of downsizing of the public sector involves cuts in public welfare expenditures on education, health and social welfare as well as closing down of public production units. While the former have direct adverse implications for the lives of women who were already at a disadvantaged position in accessing them, gender impacts of privatization of public services is beyond the scope of the present study. We focus on a subset of privatization practice, which is transfer of production from public to private hands. Within this subset we emphasize employment opportunities. Implications for earnings will also be left out of the study due to lack of evidence for generalization.

Apart from its organizational and financial aspects, restructuring of public sector establishments, mainly in the form of privatization, involves retrenchment in employment, which is perhaps the most overlooked aspect. (For assessments on labor impacts of privatization based on a wide range of countries in the World Bank data base, see Chong and Lopes-de-Silanes, 2002; Kikeri and Nellis, 2004; World Bank, 1999.)

A neglected aspect of privatization is its gender dimension. The notable exceptions are Chong and Lopes-de-Silanes, (2002), Geldstein (1997) and Rama (2002). The latter two studies are in closer lines with our study. Chong and Lopes-de-Silanes (2002) test, among other factors, whether there is gender (female) bias in the course of privatization, focusing on its impact on privatization prices. Based on econometric modeling of cross-country company survey data, they conclude the bias is insignificant.

On the other hand, Geldstein (1997) and Rama (2002) focus specifically on the gender impacts of privatization in Argentina and Vietnam respectively. The impacts are of a mixed nature in the case of Argentina. Adverse effects on employment, working conditions and income for both men and women are identified. Descriptive statistical analysis shows that there is a bias against women in the process of public sector downsizing, when accompanied by technological upgrading. Low skill female workers were the first to layoff.

However, restructuring in other privatized workplaces involved a gender-age mix bias in the positive direction. Younger (unskilled and subordinate) women workers were preferred due to their lower bargaining power for wages and working conditions.

The above adversities with regard to females do not emerge in the Vietnam case, as discussed in Rama (2002). Rather, downsizing of the public sector involves a bias against males, simply because overstaffing is identified in male dominant sectors, relative to female dominant low wage-low skill light industries. Still, withdrawal of female labor force due to privatization was a notable fact. This outcome is not identified as disfavoring women because of its voluntary nature accompanied by apparently generous cash compensation. Besides, a nourishing private sector is expected to increase job opportunities for females, who were subject to short term and temporary contracts in the public sector anyway.

Obviously, initial conditions regarding income level and distribution as well as production structure and social security system among others, of Vietnam and Argentina are far from being comparable hence one should be cautious in comparing outcomes of privatization. Yet a general common outcome is that for both countries the eventual impact of privatization on both female and male employment is negative. However, short-run and long-run impacts are different with respect to gender: Feminization of employment is the case in the short run due to the widely accepted characteristics of (low status, low pay, flexibility, low ambitions, low skill, informal sector...) of female labor. Although this was initially welcomed as a positive outcome of liberalization, it is now recognized that this feminization has ended up in a vicious cycle for female workers (Alarcon-Gonzales and McKinley, 1999). Furthermore, in the long run, adverse effects become significant as privatization is usually accompanied by technological upgrading, thus making unskilled labor gradually redundant. This then becomes a second cycle of retrenchment in the privatization process.

Geldstein (1997) also outlines impacts of structural adjustment in general and of privatization in particular on females in connection to their family responsibilities. It is argued for the Argentina case that as male breadwinners of the family were faced with unemployment and loss of

income, adult and married women were forced to enter and/or stay employment. Thus “this economic readjustment has not only changed the labor market, but has profoundly affected family life.” (p.8)

As Turkey has been one of the countries, which adopted the neo-liberal macroeconomic policy for over two decades now, above mentioned theoretical frameworks pose testable hypotheses for the Turkish case.

### 3-An overview of structural adjustment programs and impacts on labor in Turkey

In the early 1960s, Turkey adopted the import substitution strategy for industrialization, which was implemented by means of five-year plans. The period 1970-1976 is marked by a successful practice of import substitution in intermediate and consumption goods, mainly led by public investments. The provision to the private manufacturing industries of subsidized capital through overvalued exchange rates, low interest rates, and credit and tax incentives, led to a profitable environment especially in highly protected sectors. With the high bargaining power of labor unions and also relatively high wages paid in state economic enterprises, Turkey emerged as one of the high wage economies in the developing world. The resulting high domestic demand was the main driving force behind the growth performance, because the industry lacked international competitiveness. The import dependency in especially intermediate inputs and energy increased. As export revenues chronically fell short of the foreign exchange demanded by investment and intermediate (mainly oil) imports in the late 1970s, the severe foreign exchange and foreign credit bottlenecks forced abandoning the inward-looking strategy. (Dietzenbacher and Gunluk-Senesen, 2003)

Turkey initiated a stabilization (and structural adjustment) program in January 1980, centered around the liberalization of foreign trade and financial transactions. This transformation was in fact a condition put forward by the international financial institutions in return for releasing credits. Early steps of the implementation of the stabilization program were backed by the military take over in September 1980. Political parties and

labor unions were banned during the military rule that lasted until late 1983. Low labor costs were seen as the key element for increasing the international competitiveness and also for the creation of an exportable surplus. Real wages fell dramatically, although the share of wages (for formal employment) in total value added remained stable in this era (28.0 % in 1973 to 26.7 % in 2002). Exports, mainly manufacturing exports, increased significantly, benefiting from a wide range of incentives and subsidies. Investments in manufacturing did not increase and export performance is attributed to increased capacity utilization and productivity. The export boom was short-lived, however. Resorting to domestic demand once more, wages recovered in 1989. This year also marks another liberalization practice. That is, restrictions on foreign exchange transactions were removed, so that Turkey became open to international short-term capital transactions. Huge government borrowing at high interest rates from the domestic banking sector motivated borrowing from outside at a lower cost and from inside at high interest rates. With overvalued exchange rates, lending to the government became more profitable. Public investment expenditures as well as social expenditures fell dramatically. (Gunluk-Senesen and Ozar, 2001; Gunluk-Senesen and Senesen, 2001; Onaran and Yenturk, 2001; Yeldan, 2002).

The transformation of employment structure was as follows. The 64% share of agriculture in 1973 fell to 48% in 1990 and to 35% in 2002. Industry absorbed very little, its share in employment increased from 13% to 15% in 1990 to 19% in 2002, while services became a major employment sector with a 46 % share in 2002 (37% in 1990 in contrast to its 23% share in 1973). Public services accounted for 5% and 6% of total employment in 1973 and 1990 respectively. In short, by 1990s Turkey was already characterized by de-industrialization, with capital accumulation outside production and deteriorated income distribution and social security facilities (Cagatay and Berik, 1994; Gunluk-Senesen, 1998; SIS, 2003).

Research on the impacts of this transformation on overall female labor is limited. Household surveys started in 1988 provide hints for the reflections on female employment. A summary of labor composition in Table 1 indicates that female employment is concentrated in agriculture and hence in rural regions. On the other hand, services sector has absorbed female labor next to industry in

urban areas. In its broad context, industry includes leading labor intensive export sectors like clothing and food. However, contrary to expectations, feminization of industry employment does not prevail for the Turkish case, especially in large-scale establishments (Baslevant and Onaran, 2004; Eyuboglu et al. 1998).

One serious drawback for assessing labor impacts is the presence of informal employment in Turkey, estimated as high as % 65. Accounting for the fact that informal small scale clothing establishments as well as some services sectors employ female intensive labor, increased female labor participation in these sectors is much more likely (Ecevit, 1990; Ozar, 1996; Toksoz, 2002).

**Table 1. Composition of employment, Turkey, 1999, %**

Sectors	Overall		Urban		Rural	
	Female	Males	Female	Males	Female	Males
Agriculture	72,2	33,8	13,2	4,8	93,9	65,4
Industry	9,7	25,4	28,8	37,0	2,7	12,7
Services	18,1	40,8	58,0	58,2	3,4	21,9
Total	100,0	100,0	100,0	100,0	100,0	100,0

Source: Ecevit, 2000: 136

#### 4-Labor aspects of privatization in Turkey

One major component of the liberalization strategy implemented from 1980 onwards has been privatization of State Economic Enterprises (SEEs), which are public establishments in manufacturing industry. These establishments served as the engine of industrialization and growth and in the pre-1980 era in Turkey, not only due to their large scale both in production and employment, but also due to their provision of subsidized high technology intermediate inputs to the flourishing private sector in the import substitution era. However, by 1980, SEEs were seen, by the policy makers, as the scapegoats for the macroeconomic imbalances and hence privatization was announced as an urgent agenda item for the constitution of a competitive and thus efficient domestic market. With related bills passed in 1984, 1986 and finally 1994, and a strategy program set in 1985, the legal basis for the implementation of privatization was set in due course. The privatization scheme covered 240 public establishments as well as infrastructure units

(highways, bridges, power stations). By 2004, 159 of these establishments were totally transferred to private hands (OIB, 2004).

One major aspect of the downsizing of the public sector is its impacts on the labor employed in privatized SEEs. The privatization scheme also covered employment adjustment measures such as early retirement, lump sum severance payment and displacement (Tansel, 1998). While the total number of employees in the SEEs was around 643000 in 1990, it fell to 385500 by 2002 (Turel, 2003). A complementary data is as follows: during 1985-1995 the share of SEE in total employment fell from 4 % to 2.8 % (KIGEM, 1997, p.9) It should also be noted that retrenchment is not solely the end result of privatization, rather in most cases, it was implemented at the outset to attract buyers (Ozmucur, 1997; Tansel, 1998).

A general assessment of the gender aspect of retrenchment due to privatization of almost two decades is not possible since employment statistics of the Privatization Authority and Employment Agency do not provide data on the male-female composition of labor in the privatized establishments. Although far from compensating for this drawback, guided by interviews with administrators in TEKEL (Turkish state monopoly of tobacco, cigarettes and alcoholic beverages) and TEKGIDA-IS (Trade Union in the sector), we chose to conduct a case study of a leaf tobacco establishment of TEKEL in order to gain insight to the gender dimension of privatization.

#### 5-Privatization of Tekel and impacts on Labor

The privatization plan of TEKEL presents a remarkable example of reflections of liberalization. Although it was included in the privatization scheme as late as 2001, the developments until then deserve attention. TEKEL, being a monopoly, dominated the domestic market for especially for cigarettes until 1984. TEKEL was also a monopsonist in the tobacco market, committed to purchasing all the tobacco, producers of which benefited from subsidized (support) price system. The significance of implications of privatization notwithstanding, the TEKEL case is closely linked to the abandonment of import substitution in the sector, as restrictions on cigarette imports and tobacco imports were lifted in 1984 and 1989 respectively.

Penetration of imported cigarettes to the market altered consumer preferences towards blended tobacco type. Faced with the threat of a falling market share, TEKEL altered the tobacco composition in its cigarette products and hence started importing Virginia type tobacco. This marks a significant turning point in its history: In the economy wide liberalization process, TEKEL was transformed from being an exporter of tobacco (of oriental type) to an importer of tobacco (American type) for its own cigarette production (Candas, 2002a,b).

Another significant form of transformation in due course is related to technology. This aspect has two dimensions: In the first place, TEKEL's commitment for being a monopsonist in the tobacco market was unleashed in 1994 and subsidy prices on tobacco were abolished in 2002 (Islamoglu, 2002). Secondly, some cigarette factories were shut down on the basis of no upgrading prospects, but new cigarette manufacturing and leaf tobacco processing factories (in Samsun in 1997 and in Diyarbakir in 2000) were established with high technology.

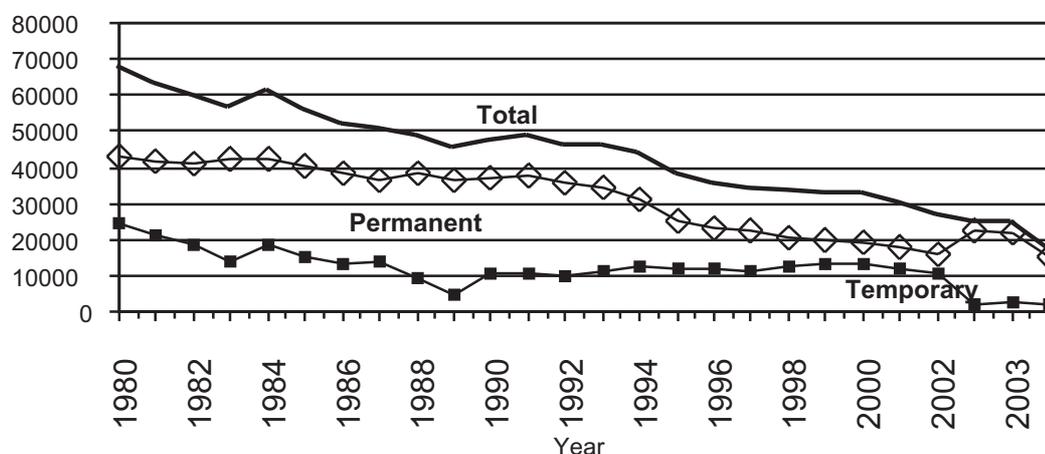
One major outcome of these transformations in the production structure naturally is the dramatic decline in employment as manifested in Figure 1 based on data provided by TEKEL Labor Relations Department. Total employment fell from around 67 000 in 1980 to 17 000 in 2004, implying a reduction of around 75 %.

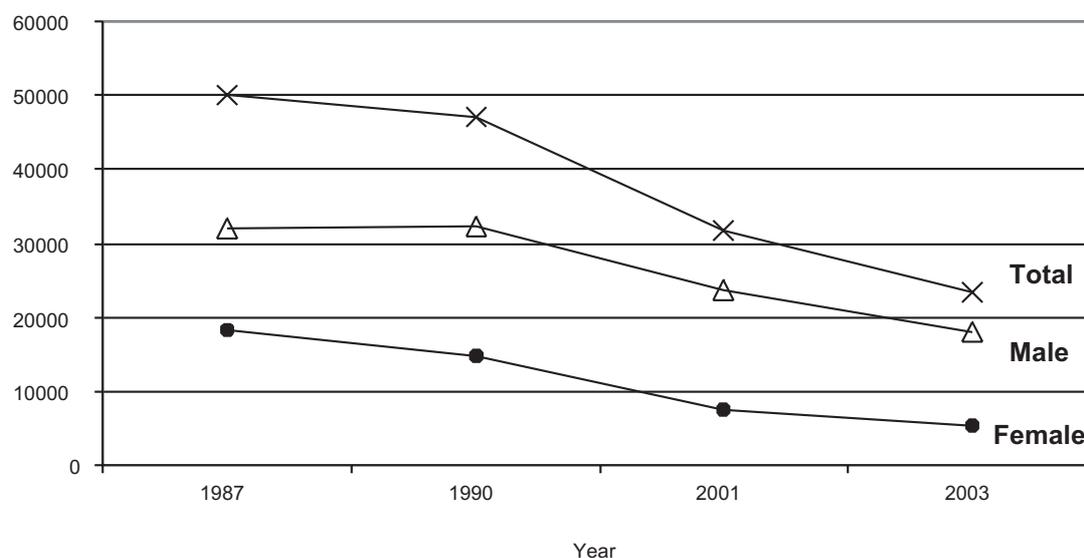
The pattern of temporary workers is slightly different than the mentioned trends. Following a decline until 1989, total temporary employment remained either stagnant or increased slightly for a decade. However, the inclusion of TEKEL in the privatization plan in 2001 reflects itself in the drastic decline of this category of employment. Temporary status employment fell by 92 % since 1980, from 24000 to 2000.

Number of permanent employees was reduced continuously until it recovered slightly in the recent years. One explanation for the reverse trend is displacement of workers due to privatization and/or closure of some establishments. This displacement resulted in some cases in a transfer from temporary status to permanent status. Yet the decline from 43000 in 1980 to 15000 in 2004 implies a 65 % reduction.

Due to limitations in data, an assessment of the gender aspects of these trends in TEKEL's employment is possible only for several years. Figure 2 (based on data provided by TEKEL Labor Relations Department) shows the male-female composition of labor in TEKEL in 1987, 1990, 2001 and 2003. The decline observed in Figure 1 is presented here with respect to gender.

**Figure 1. Employment in TEKEL, number of persons**



**Figure 2. Gender composition of employment in TEKEL, persons**

On the other hand, summary indicators based on the same data in Table 2 reveals the vulnerability of female labor in the progress of privatization of TEKEL. The most striking observation is that retrenchment of female labor (-71.2 %) during 1987-2003 was much stronger than retrenchment of male labor (-43.2). By the time of the inclusion of TEKEL in the privatization scheme in 2001, female workers were already much more severely affected when compared to males. The end result is a dramatic decline in the share of females in total employment in the same period; while females constituted 36 % of total TEKEL employees in 1987, this ratio fell to 22 % in 2003.

**Table 2. Employment structure in TEKEL**

	Change %			Female share %	
	Female	Male	Total		
1987-1990	-18.3	1.2	-5.9	1987	36
1990-2001	-49.0	-13.5	-25.4	1990	32
2001-2003	-30.8	-23.9	-26.1	2001	24
1987-2003	-71.2	-43.2	-53.4	2003	22

Source: Authors' calculations based on data obtained from TEKEL Isci-Isveren Iliskileri Mudurlugu. See Akduran (2004).

## 6-Gender aspects of privatization in Tekel leaf tobacco establishments

Leaf tobacco processing stage involves mainly manual sorting and packaging of dried tobacco leaves, which are then transferred to cigarette manufacturing. Thus it has been traditionally labor intensive and moreover, female labor intensive.

However, investments in high technology tobacco leaf processing (e.g. the Diyarbakir factory) in the recent years put an end to manual sorting, thus labor, mostly female labor, gradually become redundant.

These establishments being in the neighborhood of rural tobacco farmers have provided mostly seasonal but formal employment opportunities for a low skilled labor force, which usually lacked alternative opportunities (Dogruel and Dogruel, 2000). The duration of employment varied in the course of privatization: while it peaked as high as 12 months depending on business intensity, the term was first reduced to 11 months in 2001 and then was restricted to 5 months from 2002 onwards.

Following the inclusion of TEKEL in the privatization scheme in 2001, of the 102 leaf tobacco establishments (LTEs), 17 were identified for closing down and/or finishing off of the processing business. A total of 1695 seasonal female workers in these 17 establishments were informed of the termination of their employment. The choices for redundant employees were twofold in the beginning. They could choose either "voluntary" leave with compensation payments or early retirement. Later a third option emerged with the active intervention of the trade union TEKGIDA-IS: they could be transferred to other TEKEL establishments subject to availability of vacancies with respect to personal preferences. We call this option "displacement" in this paper. Consequently, 18 % of total remained in their

current workplaces. They were either within the disabled employee quota or had strong connections in bureaucracy to save their individual positions. Remaining 82 % followed one of the two options: Option 1 was compulsory “voluntary” leave with lump sum severance payment or early retirement (25%) and option 2 was displacement (57 %). (Table 3)

The most significant aspect of restructuring with respect to gender is that the majority chose to transfer/move to other towns-cities when faced with job loss. This is rather peculiar, as in comparison to males mobility initiated by wage earner females is rather unusual in Turkey. Relocation of female workers of rural origin to urban settlements is thus a very peculiar case. The motives underlying this outcome will be elaborated in the next section.

The geographical composition of privatized LTEs and eventual restructuring in female employment is presented in Table 3. One striking

characteristic is related to the spatial dimension of privatization: 10 of the 17 LTEs that were affected by the privatization scheme were located in the Southeast, which is the most underdeveloped region. Female employees in these LTEs constituted 60% of the total before privatization. The retrenchment was as high as 87% (reduction from 1013 to 128). Yet, they still constitute the largest group (42.7 %) after privatization.

The proportion of female employees in the Black Sea region LTEs who were affected by privatization was 24% of the total. The extent of retrenchment was also high: 88 % (reduction from 407 to 50). Their share in current female employment is 16.7%. Finally, 16 % of the total was in the LTEs in the Mediterranean region, reduced by 56 % (reduction from 275 to 122). Their current share is 40.7%. It is obvious that this last group suffered least from privatization and their share increased significantly following privatization.

**Table 3. Composition of female workers in the course of privatization of LTEs, persons, 2001**

#### NUMBER OF FEMALE WORKERS

	LTE LOCATION	INITIAL	DISPLACED	RETIRED	CURRENT
<b>SOUTHEAST</b>					
1	Batman	177	140	31	5
2	Besiri	140	140	0	0
3	Kurtalan	36	34	1	1
4	Sason	143	56	85	2
5	Kozluk	123	17	106	0
6	Bitlis	55	41	14	0
7	Adiyaman	176	33	38	105
8	Kahta	21	12	4	5
9	Besni	34	22	2	10
10	Mus	108	103	5	0
	<b>SUBTOTAL</b>	<b>1013</b>	<b>598</b>	<b>287</b>	<b>128</b>
<b>BLACKSEA</b>					
11	Tasova	124	71	48	5
12	Akcaabat	33	15	2	16
13	Trabzon	64	27	21	16
14	Erbaa	186	173	0	13
	<b>SUBTOTAL</b>	<b>407</b>	<b>286</b>	<b>71</b>	<b>50</b>
<b>MEDITERRANEAN</b>					
15	Hatay	158	46	53	59
16	Iskenderun	12	1	5	6
17	Yayladagi	105	32	16	57
	<b>SUBTOTAL</b>	<b>275</b>	<b>79</b>	<b>74</b>	<b>122</b>
<b>TOTAL</b>		<b>1695</b>	<b>963</b>	<b>432</b>	<b>300</b>

Source: Authors' calculations based on data obtained from TEKEL-YTI Muessese Mudurlugu and Tekgıda-Is Sendikası (Malatya). See Akduran (2004).

It was beyond the scope of this study to trace the various groups of female employees displaced and retired due to privatization. Instead, we focused on a subgroup, which were transferred from rural regions (South-East, Central Anatolia) to the largest metropolitan city, Istanbul.

## 7-Case study: Displaced Female Tobacco Workers in Cevizli

A total of 141 female workers were transferred from various LTE's to TEKEL Cevizli (Istanbul) cigarette factory in December 2001. 100 of them came from Batman (in the South East), 12 of which returned back in due course. There are no other returnees out of these 141 displaced workers. In-depth interviews were conducted with seven displaced female workers in the Cevizli factory in August 2003. Permitted interview time and privacy of interviews were limited. Interviews were conducted, on convenience basis, with women who were eager to cooperate. Of these 7 women, 3 are illiterate, 3 are primary school graduates, and one is high school graduate (later became a phone operator). Follow-up visits were made in May 2005 to find out gender aspects of displacement in the longer run. Observations on these will be reported below after the initial interviews.

### a-The Displacement experience: December 2001- August 2003

The interviews based on personal histories and experiences of displacement were recorded, decoded and later classified with respect to major common issues such as the decision process, family life, welfare and perception of work. We will comment on them following the highlighting dialogues presented below.

Two (NA and NU) of the interviewed female workers are from Tasova (in Amasya, centre-north of Turkey) and five (RM, NT, MA, ST and RG) of them are from Sason (in Batman, southeast of Turkey).

#### ISSUE 1: DECISION PROCESS

(Reasons for choosing displacement and choosing Istanbul as destination)

**NU:** *We (females) became redundant when TEKEL reduced the amount of tobacco that it bought from farmers from 1,5 –2 tons to 200 kg. Sorting 200 kg*

*tobacco takes 1 hour for us. As a result, TEKEL informed us that we will work only 5 months in a year but we didn't want to work temporarily. Therefore, we were obliged to accept the transfer to another TEKEL establishment in a different city. At least we might have a chance for retirement by coming here. So we left our home, our life and came here...*

**ST-** *Trade unionist put a lot of effort to stop our job losses. We went to Ankara for a demonstration. At last trade union succeeded to persuade TEKEL administration to appoint us to another workplace of TEKEL.*

**NU-** *They said that we will either be displaced or be housewives. 75 of us are displaced. We, 40 women came here. They showed us a list that included places where we could work and they wanted from us to choose 5 cities. My first choice was Istanbul and I came here.*

**Question:** *If you were entitled for retirement, would you still have come here?*

**ST-** *Yes, I would, because I am young and it's early for retiring. My children are very young and I have to work to satisfy their needs. I wouldn't have come here if I were older or my children were old enough to survive by themselves and if I had a right for retirement.*

**NT-** *They suggested to us different places such as Istanbul, Adana, Diyarbakir, Malatya and the like. People said that Istanbul is a big city, so we came here.*

**RG-** *I thought that Istanbul is a big city, which can provide my children job opportunities, that is why, I chose Istanbul.*

**ST-** *I chose Istanbul for my husband because he was unemployed for a long time and I thought that he may find a job here in Istanbul. And also some of my relatives were living in Istanbul. I thought that they might help us to adapt here.*

#### ISSUE 2: FAMILY EFFECTS

**MA-** *I rented a flat in Istanbul with female worker friends who came here because of the removal. We couldn't bring our children with us. Because they were attending to school. Our husbands stayed there with children and my female*

worker friends and I lived here for about one year together. Some friends of mine came here with their husbands, and the elder child looks after his/her brothers/sisters back in hometown.

**Question:** Does your husband work?

**NT-** No, he doesn't. When we were in hometown, sometimes he was working as a driver. In Istanbul he couldn't find a job and now he is looking after children.

**Question:** Do you have any problems with your husband due to his unemployment?

**NT-** Unfortunately, yes.

**Question:** What is your husband's job?

**NA-** At the beginning we had some problems. Because my salary wasn't enough. He is unemployed. He couldn't find a job. Now he is doing cleaning and looking after the flat which we live in. He is earning 250 million (~\$170) per month.

**Question:** Did your husband also work for TEKEL when you were in your hometown?

**MA-** No he didn't. He hasn't got a job.

**Question:** Was your husband unemployed for 20 years?

**MA-** Yes, he never worked.

**Question:** The burden of your family was on your shoulders since your marriage, wasn't it?

**MA-** Yes, it was.

**Question:** The husbands of the women that I interviewed are all unemployed. Can you reckon the reasons of this?

**MA-** I have no idea...

**Question:** Did your husband look for a job after you moved to Istanbul?

**ST-** Yes. He found some jobs but work places were so distant from home. Because he had to look after our older son he couldn't take these jobs. At last he found a part-time job in a supermarket, which is near our home. Now he works there until our big

son comes home from school. Sometimes, when he is late, neighbors are looking after him.

**Question:** Did you have any problem with your husband due to his unemployment?

**ST-** Yes, certainly. We had some problems. Because of moving here we incurred a big debt and we had difficulties surviving our life.

**Question:** Who is looking after your children when you are at work?

**NT-** Their father is looking after them. My younger one is two years old. I am taking him to the daycare center of TEKEL.

**Question:** Do you pay anything for this?

**NT-** No I don't, but sometimes TEKEL gives clothing, shoes, sweatshirts etc... to children and than TEKEL cuts these costs from our salaries.

**Question:** When you were in Batman, who was looking after your children?

**NT-** There wasn't a daycare center in Batman and my mother-in-law was looking after them.

**Question :** Which one is better for you?

**NT-** Of course my mother-in-law was better because at least she is our relative; but here people who are looking after our children are strangers...

**ST-** One of my children is ten years old and he can manage on his own. But I'm taking the younger one to the daycare center of TEKEL. My mother was looking after them in Batman.

**NU-** My older son is staying in Amasya. I brought with me my three younger children to Istanbul last year. But they didn't want to live here. I go to my hometown to see my children at least once a month. So I am spending almost all of my money for bus tickets.

### ISSUE 3. WELFARE EFFECTS/LIVING STANDARDS

**RM-** Life is too expensive here. We couldn't save up anything. For example, in our hometown we had hens for eggs, but now in Istanbul sometimes we may not find enough money to buy even one egg.

**NA-** We have many difficulties in Istanbul. Before we begun to live here, we had no idea about living in a city. Living in a big city is too expensive. In hometown we can go to work by a shuttle for a little amount of money. We didn't have to pay flat rent. We had our own garden and everything. We used to farm there. We were planting tobacco, wheat... We used to grow our own vegetables, make our food and drinks. But we came here and my husband couldn't get a job. We have night shift here, my salary is a bit different here. Our income there was better than here. It is not the same here everything costs money. The expenses here are more. Even if you earn one thousand YTL (new Turkish Liras) (~\$700) per month, there is no way that it can suffice.

**MA-** Since there is shift here it (salary) differs a little. We used to be richer in Batman. I don't know; we had farms and were growing our own vegetables.

**NT-** There is no way that we can survive. We cannot save. We just survive from month to month.

**Question:** How much do you earn a month?

**NT-** 750 YTL (~\$510) per month. We were earning the same. Both salary and bonus are the same.

**Question:** How much do you pay for rent?

**NT-** We pay 150 YTL (~\$100). We live in a flat in Cevizli. There are three rooms but they are small. When we were living there, we had a home with a garden. Now we are living in a little apartment. No matter how much we earn, it isn't enough for living in this city. We have become poor here.

**ST-** It was cheaper there, rents are lower there. Expenses are more here.

#### **ISSUE 4. JOB SECURITY**

**Question:** What do you think about privatization of TEKEL?

**NU-** If they allow, I would like to work for 5 more years. When TEKEL is sold I don't know what is going to happen. If they say "Go away" we don't have anything to do, we came from our hometown for this job opportunity. I don't know if they are going to offer another job opportunity to us. I am a worker for 18 years. I always had fear of lay off.

*It is the same here. We were seasonal workers. When are they going to lay off? Which month? Which day? It is always the same. We came here and it is the same. Fear is always with us.*

**ST-** We always had discomfort, it started in May. We always have it.

#### **ISSUE 5. JOB DESCRIPTION**

**Question:** Can you tell about your work back in there?

**NT-** Tobacco leaves are grown by farmers. Tobacco experts were buying them. They brought huge piles in front of us. We unpacked them, we sorted them into three leaf by leaf. We stuffed the tobacco in boxes. After that we took them to the weighing-machine and weighed them there. Male workers pack them and sent them. Tobacco was prepared there and sent here afterwards.

**Question:** Did TEKEL also offer male workers displacement?

**NU-** No, only to females.

**Question:** What is the reason of that, do you think?

**NU-** Male jobs were different. We were sorting leaf tobaccos into three groups according to their quality. But male workers were doing transportation of tobacco, from leaf tobacco establishment to cigarette factories. They were packing sorted tobacco leaves and were driving cars.

**Question:** Comparing working conditions, what would you say?

**NT-** In god's name it was more comfortable there. There were more relatives and friends there, we feel alienated here. We worked there daytime but there is night shift here. Working in factory is very difficult here because machines work continuously. But I don't want to see privatization of TEKEL.

**Question:** Did you know which department you were going to work, before you came here?

**ST-** No, I didn't. The day we came here, trade unionist took us to the register office of the factory. The register officer looked at our files and placed us in

*vacant positions in the factory. For example, I started to work in the blending department Women in blending department sweep floor. We swept dust of tobacco there. After 15 days, I was sent to the second blending department. There were bands, which carry minced tobacco. Our job in this department was controlling the dampness degree of tobacco by monitoring. When it is too damp, the degree increases, and we take the tobacco from the band and when the dampness degree decreases to a normal level, we put the tobacco slowly on to the band again. I stayed in this department for 15 days. After that we were sent to the machines. There are machines here, which make cigarettes. I stayed there for almost 1 year and lastly I passed to telephone central of the factory as an operator.*

#### **ISSUE 6. THE MOVING PROCESS**

**NT-** *We were 250 women in Sason. Some of us got retired. Others were sent by TEKEL to different cities such as Istanbul, Diyarbakir, Adana, Malatya etc... We came to Istanbul. We felt in a mess and we were very miserable. After we came here, our tears didn't dry about two months.*

**Question :** *How many days did TEKEL allow you to move here?*

**NT-** *They didn't say anything like that. We signed the notice that our work there terminated on a Saturday, then got on buses on a Sunday night, came here and started to work here on the Monday morning. So we did not get any off day.*

**NU-** *No, no days. We stopped working there and started here one day later. Our relatives in Istanbul helped us to rent a flat . We got on a truck on a Friday and came here in two days with our furniture. We started to work here on the next Monday. We came here in December and it was snowing.*

**RM-** *When we came here in December, we had to live for ten days without a stove! We were in an awful situation. I don't want to remember those days.*

**RG-** *We stayed in our relative's home for several days. They helped us to find a place to stay and we rented a flat. At the beginning we had only one bed and our dresses. We couldn't bring with us any furniture because our children stayed back in hometown.*

In general the displacement process turns out to be a painful experience. Humanitarian concerns in this specific privatization case is lacking: the displaced workers were not given any notice in advance, which would have allowed them to get organized for the radical change in their lives instead of rushing immediately to start work in Istanbul.

Job security or security for the future being a dominating motive is accompanied with radical transformations in family roles and welfare conditions. Consent for moving to Istanbul is grounded on broader opportunities for the family and the kids especially both in terms of education and employment. However, it appears that expectations were not fulfilled, so breadwinning seems to be a long-term responsibility of these females.

The new environment in Istanbul brought with it acquaintance with the markets both for food and accommodation. While they produced their own food in their former lives and lived in their own farmhouses, all of these formerly unpaid services had to be bought with cash in their new lives. However, as the overall price level is quite higher in Istanbul, their living standards declined tremendously with their salary level remaining almost the same. Besides, obligations for sending a significant amount of the salary to children who remained in hometown put an extra pressure on survival. In sum, welfare losses are being endured to avoid further losses in the future; perceived prospects for welfare gains are rather dim.

It turns out that whether employed or unemployed, husbands were also transformed to some extent with regard to their traditional roles. They took care of children and the house with a probably involuntary acceptance of the breadwinning role of their wives. These new domestic tasks for males would not have been required from them, had they all stayed back at home, since the main childcare support came from elder females in the family. Yet, in the current environment when daycare facility does not prevail, support from neighbors implies solidarity among females: among working ones and housewives.

The main reason as to why females were mainly subject to displacement is also revealed in the interviews above. Termination of so called feminine tasks, which required unskilled manual work (like sorting leaves) automatically led to retrenchment of females, while more skilled and so

called masculine tasks (like carrying and driving) were much less adversely affected. In due course acquaintance with new technology in Istanbul should have had an in job training effect on these females, which naturally is more demanding in terms of work hours and work conditions. Changes in the organization of work like night shifts had obviously an additional impact in the lifestyles of related families.

Interviews with administrators in various posts in TEKEL and displaced female workers revealed two significantly beneficial outcomes with regard to job security, which probably were not planned at the outset of privatization. Firstly, workers who were at temporary status before displacement were transferred to permanent status in their new workplaces. Secondly, 25 % of the displaced workers who applied for reversal of this transfer on the basis of family conflicts were able to return to initial workplaces, again with permanent status. Though the number of employees who enjoyed these opportunities in the TEKEL leaf tobacco case might be limited, the credit for this procedure is given to the labor union TEKGIDA-IS, which also facilitated the displacement option for members against lay off.

#### b-Follow up observations: may 2005

We found that 2 of the 7 females we interviewed had returned home. The reasons were retirement and inability to cope with the problems of a big family (12 children) split apart. In May 2005 we re-interviewed our 5 previous subjects and interviewed 5 more (4 from Amasya, 1 from Batman) displaced female workers in Cevizli factory. Our current data source is the sample of 12 persons.

A general finding is that the standard of living has further deteriorated due to high (200 %) pace of rents, mainly because salaries increased only by around 7 %, from 750 YTL in 2001 to 850 YTL in 2005. These workers had to move to cheaper flats (at least twice on average in the last 3.5 years). This often required alteration of schools as well, which became another factor adversely affecting children's school performance. Children have grown up, attending higher level schools. Besides, their demands to keep up with other Istanbul kids is more outspoken, altogether posing greater pressure on family budgets. Their adaptation to Istanbul makes it now much harder to consider going back to hometowns.

Majority of husbands are still unemployed or temporarily employed. They are more settled in the daily routine of housework and childcare. In sum, the displaced breadwinner female worker has dim prospects for improved welfare in Istanbul, and her responsibilities have indeed become permanent.

Three recent developments regarding the retrenchment practice emerged during the follow-up study. Firstly the procedure of displacement was altered in October 2004. Employees of recently privatized workplaces are now transferred to public offices (ministries, local government offices) in the same town. Thus destination of displacement is not determined with respect to job qualification and/or economic activity any more. This puts an end to forced mobility to distant locations in the future. However, one of the final practices of displacement reveals interesting gender differences. Following the privatization of TEKEL alcoholic beverages in 2004, displaced female workers returned home shortly, suffering much less than those of the tobacco case. The distinguishing factor is that their husbands had job security at home. On the other hand, almost all displaced male workers, breadwinners of the family, left their families behind. TEKEL provides accommodation in dormitories for this group, which obviously has advantageous implications for cost of living and saving for the rest of the family. This is yet another challenging area of research.

Secondly, some workers who were subject to displacement sued TEKEL for the practice of "involuntary retirement". The court cases were not finalized yet, but during implementation TEKEL made 20% bonus payments to those who retired involuntarily from October 2004 onwards. These indicate that social pressures can lead to reversal of policies and compensation with humanitarian concerns and that the labor regulation responsibility of the state should not be abandoned.

Thirdly, some modernization took place in the still functioning LTE's, which re-demanded female labor, posing a controversial case for gender aspects of technology. The new machinery installed for packaging made male physical advantage redundant, but required female labor, because tobacco leaves had to be fed to the machinery with care. It is interesting but also ironic to see that this is the case in Batman, a major origin town for the

displacement practice in 2001. Thus, interactions between technology and female employment might differ with respect to the production process, posing challenges for generalizations.

## 7- Conclusions and policies for the future

In line with the global implementation of privatization, labor impacts in general, gender impacts in particular have been the most overlooked issue in Turkey. The weak infrastructure of safety nets in the informal sector and for the unemployed aggravates adverse effects of retrenchment. Furthermore, the persistent character of high unemployment in the economy adds to the already high risk of job loss. Under these circumstances employment in the public sector has been a safe haven for both men and women of all ranges of qualifications in Turkey.

In the course of structural adjustment, public sector downsizing included closing down and/or modernization of labor intensive public enterprises such as TEKEL. This practice implied serious reduction in the number of employment. We find that the rate was higher for females than that of males. When alternative work and/or retirement income in the current settlement is not available, moving to where the bread is has been a universal trend. The Turkish case is no exception.

Personal experiences and perceptions of female workers subjected to displacement offer invaluable clues for the gender dynamics of family roles, values and forms of coping in a completely different environment. In the case of privatization of Leaf Tobacco Establishments, the breadwinner had to accept the compensating job offer, be it far away from hometown. In our field study, we studied the experiences of female breadwinners, which is rather an exceptional case for Turkey, but also was a case for Argentina (Geldstein, 1997). However contrarily in our case they are not single mothers, but are married with children and their husbands did not have secure jobs that they could not abandon. Still, despite disparities due to the scale and sector, main findings regarding the impacts of privatization on females for Argentina turn out to be also relevant for Turkey.

The lessons learned from the practice of privatization in Turkey with a gender perspective both at macro level and micro level can be outlined as follows. In the macro domain, the shift to the

liberalization paradigm in economic policy design has resulted in welfare loss for the disadvantaged in the society. Policies in developing countries for eliminating macroeconomic imbalances in general, budget deficits in particular, have overlooked the already chronic inequalities in income distribution and opportunities. These flaws with respect to social welfare have produced even more deteriorated conditions for women. In sum, the liberalization practice in its present context is bound to bring acute social problems. Although the practices might be revised towards compensating the losses in due course, injustice still prevails, as the subjects of early rounds of policy implementation are left out of this compensating scheme.

It is important that a pre assessment of likely social impacts of related policies, privatization inclusive ought to be made at the outset of policy design. Hence, the objective function of policy design should be dominated by social welfare. This proposed paradigm shift by definition involves introducing a perspective, which is gender aware. Such a mission is beyond technical issues of economics and engineering, therefore a multidisciplinary policy making process should be initiated. In some cases present implementation might be abandoned, in other cases it might be significantly revised to eliminate likely losses in welfare.

It is obvious that data production/compilation has not been gender neutral, therefore a simple but very crucial requirement to study gender impacts could then be fulfilled: For example, employment data at macro level in the course of privatization would be compiled on gender basis, data would which is lacking at present. Classification of labor with respect to gender, education, skill etc. simultaneously will reveal relative losses/gains of females. The context of social security facilities would be designed accordingly.

This reorientation at macro level would also relieve some of the likely adverse impacts at micro level. Revision of economic decisions, introduction of exclusive social security opportunities would lessen the family burdens on females like concerns for education and employment of children. The remaining level specific issues could be addressed by introduction of gender aware information and skill building centers in especially trade/labor unions, which have to be empowered rather than weakened as has been in the course of privatization.

For all these and similar proposals to go beyond wishful thinking, a novel approach to assessment of gender impacts of the current macroeconomic policy implementation is needed. Multidisciplinary research pursued by collaboration of researchers from different fields would generate gender aware implications in a much more comprehensive framework.

One possible institutional structure for the coordination of related research in Turkey would be the Directorate General on the Status and the Problems of Women (KSSGM) established in 1990 under Prime Ministry. However, its power in transmitting research findings on the various forms of gender bias in policy design and implementation has been subject to restrictions by its very status. There were cases when ruling bureaucracy interfered with research findings prior to dissemination. Transformation of KSSGM towards an independent gender research institute, acting in coordination with university woman studies centers and related NGOs would empower gender aware policy research. Such research products will then serve to exert pressure on policy makers towards altering their positions of gender blindness, thus towards shifting the current paradigm.

Finally, from the international perspective, initiation of an e-network on gender impacts of liberalization (say GIL) could be suggested. GIL would serve as a topic- specific pool of research (reports, articles, papers, books, actions). This would invoke and encourage similar research in some countries. Through transmission of experiences, like ours, GIL would also serve to convey warnings for countries, which are relatively in earlier stages of liberalization. This type of an international network would again serve for the empowerment of researchers in various countries in their attempts for transforming current policy making process into a gender aware one.

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# VI. Gender and Trade Liberalization in the Middle East and North Africa: Conclusions and Recommendations

By Valentine M. Moghadam

Economic globalization and its correlate, trade liberalization, offer women opportunities for employment and entrepreneurship, but there are risks and social costs as well. There is little consensus among researchers about the short-term and long-term impact of liberalization. Many feel that the current neoliberal trade agenda does little to advance economies, let alone social groups such as workers and women (UNDP, 1999). Activists in the global justice movement – including transnational feminist networks such as the Women’s International Coalition for Economic Justice (WICEF), the Gender and Trade Network, Women in Development Europe (WIDE) and the Women’s Environment and Development Organization (WEDO) – argue that the new trade agenda benefits the big corporations and rich countries, squeezing out small producers and wage earners (see, e.g., WIDE 1998, 2002). And even policymakers who are committed to a liberalized trade regime disagree on trade rules and their implications for different countries and different sectors of their economies. To satisfy their own populations, including powerful unions, the countries of the North continue to protect certain of their products or enter into bilateral trade agreements with specific terms. The countries of the South are determined to enter the rich country markets, but to do so they must open up their own markets to competition. The evidence on its impact thus far is mixed.

China – currently the world’s factory – is usually cited as an example of a successfully liberalized economy that has benefited enormously from massive amounts of foreign direct investment, though in fact China is not highly liberalized and its financial market remains restricted. Certainly it has enormous reserves of educated workers ready to serve in the countless factories that have been set up to produce and export goods. India – with its huge reserves of educated, English-speaking middle-class workers – has become a major site of offshore services

(“teleservices”) by credit card companies, airlines, banks, and other service providers. In both countries, however, poverty and inequalities remain massive even though some workers and some producers have clearly benefited from liberalization. Moreover, although both economies have grown and wages have increased, social exclusion and relative poverty have increased, and there are many concerns about environmental degradation.

The Middle East and North Africa, in general, has not been able to cash in on opportunities for investment and trade. One reason no doubt lies in the continued centrality of oil in the economies and exports of many countries of the region. Despite years of attempted diversification, those countries with substantial oil reserves, including the large countries like Algeria and Iran, remain dependant on oil exports for foreign exchange earnings. Modern manufactured goods and services are not yet fully developed, and there does not exist a large reserve of educated workers with knowledge of European languages willing to work in factories or tele-services. Despite massive unemployment in the region, those with high school degrees continue to expect office work, while those with bachelor’s degrees usually do not have fluency in another language. In particular, the region lacks the kind of educated female labor force willing to work in factories and services that have made countries such as India, China, Vietnam, and Malaysia attractive to foreign investment. The region’s political volatility and its lack of stable and transparent institutions make it a risky environment for investment. Thus flows of foreign direct investment (FDI) into the region are among the smallest in the world. Considering just the Arab region, the share of total FDI barely came to one percent over the period 1976-1998, with a steady downward trend (UNDP 2002; World Bank 2000)<sup>1</sup>. Turkey and Morocco receive the largest amounts, but even so, these are comparatively small FDI flows.<sup>2</sup>

<sup>1</sup> In addition, despite the role played by petrodollars in global finance, the Arab world and Iran remain comparatively cut off from financial globalization. Some argue that financial markets should be liberalized (see discussion in Henry and Springborg, 2001, and in IMF, 2003). However, the financial crises experienced by southeast Asian countries in 1997 should be recalled, and it should be noted, too, that the Chinese economy has grown in the absence of financial liberalization.

<sup>2</sup> In 2001, the proportions were: Turkey 35%; Morocco 28%; Algeria 13%; Egypt and Tunisia 5%; Lebanon 3%.

Of course the region has not been remaining entirely stagnant, and there is differentiation across countries. Successful Middle Eastern companies are found in telecommunications and tourism, and the Gulf islands are fast becoming the most open and liberalized. Tunisia and Morocco—always more open to foreign investment and trade, as well as to women’s employment – are entering into new trade agreements with the European Union. But all this raises a number of questions. Will Tunisian and Moroccan women workers benefit from the new trade agreements through enhanced job opportunities, or will they lose jobs as their companies find it difficult to compete with the foreign businesses and products? And what about wages and benefits – will socio-economic rights be protected? Will there be opportunities for the expansion of women-owned businesses? Could the Gulf countries become a magnet for intra-regional labor migration – as they were in the region’s oil boom golden age (1960s-1980s)? Or will the region continue to rely on foreign contract workers?

One answer to these questions lies in the presence or absence of a qualified work force. Here the region remains deficient compared to other regions. As Moncef Ben Slama observes in regard to Tunisia, most women workers have low levels of educational attainment, especially in the feminized textiles sector, and few women with higher education are found in supervisory roles in the manufacturing sector. This is so despite the fact that educational attainment is increasing in the population as a whole. Despite state investments in the education sector over several decades, and notwithstanding dramatic increases in literacy, educational attainment rates in the MENA region remain relatively low and the quality of schooling has been deteriorating. As noted by Karshenas and Moghadam (2006: 10):

“During the period of the 1960s to the 1990s, MENA countries benefited from high rates of public spending on health and education. The combined rates of public spending on health and education as a share of GDP in the MENA region, even after the retrenchments of the 1990s, has been very high as compared to other regions. Per capita public spending on education in the MENA countries is in general well above other countries at comparable levels of per capita income. Nevertheless, educational outcomes, despite the achievements in the area of youth illiteracy, have

not met expectations. Indeed, it is in the area of education that the handicaps of social development in the MENA region are most prominent, and where the main disjuncture between social and economic development is most pronounced.”

Gender gaps in literacy and educational attainment have been narrowing in recent years and school enrolments are up, but the benefits of this progress will not be felt for some time – and there remains the problem of the quality of instruction. Meanwhile, the new global trade regime poses challenges to countries that lack an educated and skilled working-class, including working-class women.

### What do we know about the female labor force in MENA?

Prior research has shown that while some patterns of women’s employment in the Middle East are similar to those found in other regions, the region’s female labor force does exhibit some distinctive features that are rooted in both political economy and culture:

- Female employment levels are lower than in other regions in the world-economy.
- Most of the women in paid employment have been concentrated in professional jobs, showing the links between educational attainment and female employment. Thus most of the female salaried labour force has been middle-class.
- Working-class women gravitate to jobs in the textiles and garments sector, and to domestic labour. (Many of those in domestic service jobs take care of the children of the middle-class women in the professions, as do imported domestic workers.)
- Certain occupations that are typically female-intensive in other parts of the world are not so in MENA: wholesale/retail/commerce; hotels/restaurants etc.
- The female labor force has been getting more literate and educated, but the mean years of schooling remain relatively low.
- Female unemployment rates are very high – and college-educated women are more likely to be unemployed than are college-educated men.

- A substantial proportion of economically active women are counted as unwaged workers (mostly in family enterprises and in agriculture).
- Labour legislation favors women in the government sector and large enterprises (paid maternity leaves, crèches and childcare facilities, early retirement) – but agricultural workers, domestic workers, and those in small enterprises are largely outside its purview.

Explanations for the above characteristics are rooted in the structure of economies, in state policies, and in cultural understandings. Elsewhere, I have elaborated on these factors (Moghadam 1995, 2003): the oil economy and the high wages earned by male workers during the oil boom era; the state's economic policies (rentier or oil vs export manufacturing) and social policies (family laws, labour legislation), which affect female labor supply and demand, as well as earned income (see table). Cultural norms and gender ideologies – or what I have called the patriarchal gender – can also shape the supply of, and demand for, female labor. I also pointed out that the more open, non-oil economies, namely Morocco and Tunisia, tended to have higher levels of female employment and a greater presence of women in the manufacturing sector, compared to most other countries in the region.

**Table 1. Estimated Earned Income (PPP US\$), 2000**

Country	HDI Rank	Female	Male
Kuwait	45	6,895	22,186
United Arab Emirates	46	5,320	24,412
Saudi Arabia	71	3,466	18,252
Lebanon	75	2,013	6,704
Turkey	85	4,379	9,516
Tunisia	97	3,347	9,320
Islamic Republic of Iran	98	2,524	9,088
Jordan	99	1,749	6,014
Algeria	106	2,389	8,150
Syrian Arab Republic	108	1,537	5,522
Egypt	115	2,003	5,227
Morocco	123	2,019	5,068
Yemen	144	405	1,384

Note: The countries are listed in order of their ranking on the UNDP's human development index (HDI), out of a total of 170 countries. The earned income variable is an estimate based on the female (and male) share of the economically active population, total female (and male) population, and GDP per capita (PPP\$).

Source : UNDP, Human Development Report 2002, Table 22.

## Gender Dynamics of Liberalization: Some Observations

In theory, the shift from a statist economic development strategy financed by oil revenues to a more open economy that liberalizes prices and trade could affect labor supply and demand. As Ragui Assaad's paper shows, liberalization seems to have triggered an increase in female labor force participation. Egypt, however, has not benefited from liberalization, at least not in terms of female employment. Why? Assaad's explanation lies in the differences between rentierism and export orientation. Morocco's pattern of insertion in world trade relied increasingly on labour-intensive manufactured exports (largely textiles and garments), whereas Egypt continued to rely on tourism, oil, transit receipts (Suez Canal tolls), and remittances as its main sources of foreign exchange revenues. In 1998/99 the Moroccan female share of blue-collar textile manufacturing employment was over 60% (up from 38% in 1990/91) while in Egypt it actually declined from 17% in 1988 to 15% in 1998. Assaad argues that there has been, in fact, a "de-feminization" in the Egyptian labor market.

We need to understand this phenomenon better for the MENA countries. De-feminization implies that women were the majority of workers in a given sector and have since lost their employment share. Research shows that this has occurred in previously female-intensive enterprises along the U.S.-Mexico border, when the technological content increases (Sklair, 2002). It is not clear if this has occurred in Egypt. Indeed, it is not clear that if any sectors were previously feminized in Egypt. By contrast, I have noticed a declining share of female manufacturing workers in Tunisia, a situation worth monitoring. Similarly, the case studies of Turkey reveal the retrenchment effects of enterprise restructuring and privatisation, especially in female-intensive industrial sectors. Gulay Gunluk-Senesen and Ozgun Akduran show that women workers were disproportionately affected by the privatisation of the tobacco company TEKEL. Thus, a de-feminization appears to have occurred in Turkey, at least at some enterprises.

Assaad's explanation for the differences between Egypt and Morocco is a sound one, but political economy may provide half the explanation. Elsewhere, I have argued that in theory, the growth of the tourism sector should lead to a growth of women in retail/restaurant employment, but that

thus far, women in MENA seem not to have gravitated toward the tourism-related sectors. Assaad's data for Egypt shows that women's employment has not grown in these sectors since liberalization was launched. This would confirm the relevance of non-economic factors: socio-cultural factors seem to play a role in female labour supply and demand.

As Assaad's paper shows, overall employment, including female employment, grew more in Egypt than in Morocco, and Assaad mentions the growth in government employment in Egypt as the key explanatory variable (which is part of what I have called the feminization of government employment in the Middle East). But the data also show that a far higher proportion of employed women in Egypt are involved in non-wage work – and that the proportion increased between 1988 and 1998, whereas it remained stable in Morocco. (See his Tables 1a and 1b). Thus, with respect to Egypt, we need to understand why non-waged employment keeps rising; why more women are not involved in the tourism sector; and why the economy has not diversified with liberalization but remains largely rentier. Could it be because Egypt receives less FDI than does Morocco?

Another interesting, if somewhat disconcerting, trend presents itself in Assaad's research: the increase in the category "domestic and other service workers" in Morocco, and the large female share of that occupation. What explains the apparently high demand for domestic/service workers? Can it be the growth of tourism in Morocco? Is there an increasing demand for domestics by employed women in the professions?

The Tunisian case shows the links among liberalization, employment status, and entrepreneurship. The paper confirms that liberalization is associated with the growth of temporary jobs. In Tunisia, labor market flexibility and privatisation have led to an expansion of temporary jobs since 1997 and the growth of small- and medium-sized businesses (SMEs). Half of the companies in the textiles sector are small-sized ones, including those owned by women<sup>3</sup>. Women-owned SMEs have grown, and the share of the female labor force in the category owner/self-employed increased from 20% in 1990 to 31% in 2000. Increasingly, Tunisian women's enterprises are export-oriented (the number of textiles enterprises increasing

from eight in 1992 to 192 in June 2003). The number of women-owned businesses with capitalization of more than 50,000 dinars increased from five in 1992 to 82 in June 2003 (with about 60% in textiles). In addition, there has been a dramatic decline in illiteracy for both male and female workers. Yet more needs to be done to increase the educational attainment of workers in the industrial sectors.

Much of the feminist literature has written about the double burden of women, that is, their responsibility for both productive and reproductive labor (Folbre 1994). If liberalization leads to an increase in female employment, can we expect government, municipal authorities, employers, and the private sector to provide affordable and quality childcare facilities? How will maternal employment be supported? The Turkish case discussed in the paper shows that working class women generally rely on mothers and other relatives, along with neighbors, to care for their children while they are at work. In most countries, labor law mandates childcare facilities at factories with a certain number of women workers, and these exist in factories throughout the region. But such childcare facilities usually are not provided by government agencies, nor are they available in SMEs. (At one small enterprise in Egypt in 1995, I saw poor women working at a sewing machine with a child in their lap.) We need more empirical research on the availability of childcare facilities, and on working women's expectations and needs. The nature and extent of what some feminists have termed the "reproductive tax" is an empirical question in the MENA region, varying by country and by social class. But what is clear is that there is one class of women that works for another class.

#### a-Enhancing Women's Economic Participation and Rights: Some Policy Recommendations

The Fourth World Conference on Women called for attention to the adverse effects of structural adjustments on women and for women's participation in economic decision-making. Of the eight Millennium Development Goals, one calls for gender equality by increasing literacy, educational attainment, and women's political participation. The International Labor Organization, along with the global union federations, has campaigned for what it calls "decent work" and "a fair globalization" (ILO 1999, 2004). In its 2001 report on gender and globalization, CAWTAR issued

<sup>3</sup> This is not peculiar to Tunisia. According to OECD 2000, more than 95% of women-owned SMEs in Korea employ fewer than five persons.

three recommendations: engender Arab labor markets; ensure that Arab women have market-relevant skills; promote civil-society institutions and organizations (CAWTAR, 2001). Can the countries of the Middle East and North Africa meet these global challenges?

Liberalization and the new trade agreements have discernible effects in textiles, agriculture, tourism, communications, and banking. Education is involved in different ways, especially in higher education. Business and management schools are being established everywhere; students from around the world continue to travel to Europe and North America to pursue higher education; and there is pressure on universities in developing countries to train better teachers for the primary and second schools and to produce students who can meet labor market demands.

In the Middle East and North Africa, privatisation has been occurring since at least the early 1990s and new trade agreements are in the offing. In general, what countries should do is to implement a long-term strategy for human resource development that includes investments in women and proactive policies to encourage women's economic participation while also protecting their socio-economic rights of citizenship. Investing in the education and employability of women could contribute to greater domestic resource mobilization through enhanced taxation of its working population (as well as other forms of taxation). Some of the MENA countries, such as Iran, have been among the lowest-taxed economies in the world (Karshenas 2001). By encouraging more women to enter the labor force and by introducing fiscal reform to make the system of income taxation more efficient, governments can mobilize increased domestic resources to finance investments in infrastructural development, improvements in the quality of education, and future structural reforms.

In this final section, we offer recommendations for governments, NGOs, the private sector, and donors that entail institutional initiatives, infrastructural development, resource allocations, legal reform, new public policies, and research.

#### b-Gender Mainstreaming

This has been the focus of much discussion internationally, and many international organizations have adopted gender mainstreaming as a matter of

policy. Gender mainstreaming can take the following forms: (1) the establishment of the equivalent of a Ministry for Women's Affairs (or Women and Family or Women and Social Development); (2) the establishment of gender units in all ministries and government agencies; and (3) the integration of gender issues, including women's employment, in policies, programs, and projects at all levels and in all sectors. The women's ministries should be funded adequately. Gender units should be established in all ministries and government agencies, but it is especially important, given the paucity of data, that they be established in the central statistical offices and the ministries of labor, agriculture, industry, the planning bureau, and the ministries of finance and trade. These gender units should have some oversight over policies, projects, and research.

Gender mainstreaming can enhance cooperation between government agencies and women's non-governmental organizations. Women's NGOs could be involved in project development and implementation, in monitoring and evaluation, and in research on economic policy and women's rights. Among other things, such cooperation could strengthen the institutions of civil society and improve state-society relations.

#### c-The Private Sector and Women

The private sector is a site of female employment and of female entrepreneurship. In the region, however, it remains unfriendly to women and largely a male domain. (This is one reason why women's enrolments at the tertiary level has been increasing dramatically in some countries.) For women wage workers, conditions must improve, and socio-economic rights must be ensured. One way to achieve this is through government-private sector cooperation: in return for hiring women workers at decent wages and with social insurance, businesses could receive tax breaks. For women entrepreneurs, credits, loans, and business advice should be provided. Certain types of women-owned enterprises could be very useful to other women and to children: sewing, food preparation, catering, appliance repairs, childcare services, transportation services, and public baths. Perhaps the establishment of a Women's Bank in each country, along with advice centers, could accelerate the growth and quality of SMEs that are owned and managed by women. Here again, partnerships among government, the private sector, and women's organizations could be fruitful.

Facilitating women's self-employment in productive, profitable, and socially useful work would serve many purposes. It would tackle poverty and reduce women's unemployment. Not only would this expand women's participation as owners and managers of such businesses and provide additional job opportunities for women, but it would also expand the range of women-friendly and child-friendly services available.

Because most start-up capital comes from family funds, women's self-employment could be encouraged by removing the legal obstacles that exist in civil law, such as the lesser share of family wealth that women receive according to Sharia law, and the husband's right to prevent his wife "from engaging in a profession or trade unfit to the family's welfare or prestige."

In the private sector, policies should be introduced to make the workplace a healthy and welcoming environment for women. National and firm-level policies against sexual harassment should be introduced. These already exist in Morocco and Egypt, but they need to be enforced, as well as monitored by trade unions and women's NGOs. Equal-opportunity employment legislation should be considered as well. An equal-opportunity employment policy is a commitment to engage in employment practices and procedures which do not discriminate, and which provide equality between individuals of different groups or sex to achieve full, productive, and freely chosen employment (ILO 1997: 65). Such legislation convinces women that there are real opportunities for them in the private sector as well as in the public sector. A media campaign could assist in spreading a positive message concerning women-friendly workplace environments.

Maternity leaves should be offered to working mothers for a period of six months, fully paid, and taken at most twice. Both mothers and fathers should have the option of an additional unpaid leave of six months. Such a policy will benefit the child, keep the family intact, and allow working mothers to balance employment and family life. Moreover, inconsistencies in maternity leave policies should be ironed out. Maternity leave policies should be unified, and ideally they should be funded by general revenues, or by some combination of employer, employee, and government contributions.

#### d-Implementing ILO Standards

Creating a legal environment more conducive to women's economic participation and rights would be facilitated by the implementation of ILO standards. These include: Discrimination (Employment and Occupation) Convention (No. 111) and Recommendation (No. 111); the Equal Remuneration Convention (No. 100) and Recommendation (No. 90); the Convention (No. 156) and Recommendation (No. 165) concerning workers with family responsibilities; Convention No. 3 and No. 103 on maternity protection; the Home Work Convention (No. 177) and Recommendation (No. 184). The gender units of relevant ministries, including the Labor Ministry and the Ministry of Women's Affairs, should be involved in publicizing and monitoring the implementation of these standards.

#### e-Supporting the Development of a Non-Profit Sector with the Participation of Women

What is sometimes referred to as the "third sector," the "voluntary sector" or the "NGO sector" consists of not-for-profit organizations and services that foster the development of civil society, citizenship, and national solidarity. Women and women's organizations can play a central role in developing this sector. They can serve as advocates for women and local communities. They can implement, monitor, or evaluate poverty alleviation, community development, or women's programs and projects. With the support of banks, donors, or government agencies, they can establish vital non-profit services such as women's health clinics, shelters for women, adult learning centers, or camps for children. And they can monitor the effects of new trade agreements on women workers and women entrepreneurs.

#### f-Tourism, Finance, and ICTs

With liberalization, privatisation and trade come tourism, the growth of occupations related to finance and insurance, and advances in information and communication technologies (ICTs). Around the world, there has been a growth in women's participation in various types of financial services (e.g., insurance, banks, accounting), but less is known about this for the MENA region. What is clearer is that many MENA countries are developing their tourism sectors and investing vast

sums in international advertisements. Some also are working to improve data, including data on tourism-related income and employment. But the tourism sector needs to become more women-friendly and amenable to women tourists. It should have women employees providing services for women traveling alone, and for women with families. In 1999 in Turkey, only 15% of the tourism work force was female. For this percentage to increase, and for the quality of the work force to be raised there and in other countries, incentives such as training, good wages, and good benefits need to be offered to women. A media campaign could assist in making the case that this sector is an appropriate one for women. Both the government and the private sector could be involved in offering training, placement, good salaries, and benefits for women to work in hotels, shops, restaurants, cafes, travel agencies, taxi and bus services, banks, etc. Women-owned businesses could be involved in the tourism sector as well.

The introduction of information technologies is changing the nature of work around the world, and it offers possibilities for women's employment in the MENA region. A wide range of services and manufacturing industries has converted previously white-collar occupations into new forms of home-based work. "Telework" has the potential to gain in importance, and it could be a significant source of women's employment. This kind of work includes typing, word and data processing, invoicing, editing, and translating. For educated women, "telework" holds the promise of more flexible and family-friendly employment.

#### g-Increasing Educational Attainment of the Labor Force

As the private sector becomes more women-friendly, high school graduates should be able to find employment opportunities there, while women with incomplete education should be able to receive vocational training that could prepare them for, and place them in, appropriate occupations.

The long-term goal should be the attainment of universal literacy and higher rates of educational attainment. To help accomplish this, universal, compulsory education should be enforced, until at least the tenth grade. (Concomitantly, the minimum age of marriage for girls should be raised to at least sixteen.) The training of women teachers should receive priority, given relatively low female shares at the secondary level. Attractive salaries or benefits should be offered to teachers who will

serve in rural or urban disadvantaged areas. It may be necessary to review textbooks and other educational materials for their portrayals of women's roles.

Historically, fertility declines have followed from female educational attainment and labor force participation. This is occurring in the MENA region as well, but at an uneven pace across countries. High fertility rates are not sustainable in a context of growing inequalities and rising unemployment. Family planning policies, along with raising the legal age of marriage, will accelerate the process. With higher educational attainment and fewer children, more married young women will be available for employment.

#### h-Policy-Oriented Research and Labor Force Data

It is well known that outside the formal sector, data on women's economic participation in the region lack exactitude. And it is very difficult to determine needed policies on the basis of unreliable data. Labor force data are not comparable, due to differing enumeration techniques over time, not only across countries but also within countries. There is a need for standardization and harmonization of surveys, and more precision with respect to female labor force participation and employment patterns. This goal should be realized by governments (and their gender units) in partnership with women's NGOs, and with donors who may wish to help fund the establishment of gender-aware data-collection methods. Donors may also fund surveys or other data-collection projects by independent research institutes.

There is a need for research around certain topics. Almost everywhere, more information is needed on women's roles in the urban informal sector, the agricultural sector, and in rural manufacturing. Surveys can be carried out to determine attitudes towards women's employment and employers' attitudes towards women employees. Research is also needed on the situation of low-income women; on women's experiences with SMEs; on the status of women managers and administrators; on experiences with, or the need for, employment services. Certain research topics are country-specific, but it is clear that we need research teams to conduct studies on the following topics related to liberalization, trade, and gender:

- Changes in the banking sector and its social/gender impact;
- Development of the tourism sector and the involvement of women wage workers and entrepreneurs;
- Advances in the communications sector and the involvement of women;
- How women-owned businesses in export sectors are faring;
- How women are involved in commercialised and export-oriented agriculture;
- Patterns and trends in female labor migration.

In conclusion, we need to know more about the gender impacts of economic liberalization, trade, and FDI in the region, countries, and country clusters. What is needed initially is a “mapping exercise” that examines the extent of liberalization across countries and economic sectors, its impact on employment and social welfare, and way that gender is involved in, and affected by, liberalized trade. As the 2001 CAWTAR report pointed out, the challenges of globalization call for regional and national-level dialogues and research that are gender-sensitive as well as poverty-sensitive.

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