



International
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▶ Enterprise Survey Report

Women in Business and Management





Enterprise Survey Report

Women in Business and Management

International Labour Organization
Union of Myanmar Federation of Chambers of Commerce and Industry

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First published 2020

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Enterprise Survey Report: Women in Business and Management

Print: 9789220323892
Web PDF: 9789220323908

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Printed in Myanmar

Foreword

In most countries, more and more businesses are realizing the untapped potential of women within their organizations. In recent years, evidence-based research has contributed to the business case for gender diversity, calling for greater representation of women on company boards and in executive management. Gender diversity in management and board membership is now an imperative to meet the challenges of today's business environment.

A range of gender diversity initiatives at all levels, as well as other forms of diversity, is becoming a strategic asset. Gender balance in top-level management and decision-making is recognized today as a critical factor for building effective and competitive businesses and organizations. Global enterprise leaders often say that a business' greatest asset is its people and an inclusive workplace that encourages diversity delivers better outcomes. From workplace policies to business culture, inclusion is an approach to running an organization that contributes to helping employees perform at their best. The 2019 global report on Women in Business and Management: The business case for change, produced by the Bureau for Employers' Activities (ACT/EMP) of the International Labour Organization (ILO), presented the business case for gender equality at the highest decision-making levels.

In early 2018 the ILO, in partnership with the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), implemented a company survey in Myanmar. Though the data was collected over a year ago, its implications remain relevant and can serve as a guide for business management in Myanmar.

We believe this survey report will make a constructive contribution to providing businesses and their representative organizations, governments and other stakeholders with useful empirical evidence and a knowledge base which they can use to improve upon their existing performance metrics, human resource practices and workplace culture while overcoming group-think. This will open the door for more women to become productive, fully-engaged employees and managers who can advance through the ranks of their company on the merit of their own skills, rather than because of gender quotas. Doing so can expand the talent pool within companies and ultimately lead to increased competitiveness and improved business outcomes. It is our hope that UMFCCI and employers will work to raise greater awareness of the tangible business benefits of diversity and inclusion in Myanmar.

We would like to thank all those who contributed to the survey report, particularly the UMFCCI, which provided information and shared valuable insights. We also extend our sincere appreciation to national EBMOs for their commitment to advancing gender diversity. We look forward to future collaboration on promoting women's talent and gender diversity in the years to come.



Donglin Li
ILO Liaison Officer
Yangon

Foreword

Expanding women's businesses and promoting more women to gain access to decision-making positions are particularly challenging and complex issues. Furthermore, these issues often mirror the inequalities that exist at all levels in gender-segregated labour markets.

Women's growing presence in the labour market is becoming a driver for economic growth and development in Myanmar. Women's participation in the labour market is ever increasing and has been the engine of global growth and competitiveness. Women are catching up with and surpassing men in educational attainment and they represent an expansion of the talent pool and a national resource.

In 2018, the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), in partnership with the ILO, implemented the company survey on women in business and management in Myanmar. A non-random sample of 200 businesses was drawn from UMFCCI affiliate associations in Yangon and Mandalay. The data gathered provide a rich set of findings about the situation of women in business and management, the challenges they face and support measures businesses can implement to mitigate them.

Some progress has been made but much remains to be done in terms of gender equality in the workplace. More concerted efforts and advocacy are needed to share the positive benefits of utilizing women's talent and skills at all levels, including in the boardroom. UMFCCI will have a strategic and timely role to play as the business world is beginning to recognize how women's contribution to economic decision-making can make a positive difference to business performance.

It is noteworthy that, according to the survey findings, women have more family responsibilities than men, which might be the most significant barrier to women in business and management. We need to address the most significant barrier to women in business and management by implementing human resources policies and practices that could help women to balance the responsibilities of work and family life.

It is our sincere wish that this report would provide inspiration and motivation for all member companies of UMFCCI to join forces in achieving gender equality at all levels in Myanmar. We need to find out tools on how to advance women and improve the companies' business outcomes.

We are very thankful for the support provided by the ILO Liaison Office in Myanmar and ILO ACT/EMP to support business and advocate for gender equality and women's equal opportunity employment in the workplace in Myanmar.



Daw Khine Khine Nwe
Joint Secretary General

Union of Myanmar Federation of Chambers of Commerce and Industry

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Executive Summary

Across the world, more businesses are realizing the untapped potential of women within their organizations. Although they represent slightly over half the potential world's workforce, women remain a underutilized asset for most firms, and significant barriers remain to their advancement in the workplace, particularly at higher levels of management.

The Bureau for Employers' Activities (ACT/EMP) of the International Labour Organization (ILO) has developed a Global Company Survey to gather data on these dynamics so that employers may better understand the situation of women in business and management and work to unlock their full potential. To date, the Company Survey has been conducted in over 70 countries, and has generated an extensive database of gender disaggregated data on business operations and how they impact women in business and management.

In early 2018 the ILO in partnership with the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), implemented the Company Survey in Myanmar. A non-random sample of 200 businesses was drawn from UMFCCI affiliate associations in Yangon and Mandalay. Surveyors administered an abridged version of the survey that was tailored to the Myanmar context. The resulting sample cannot be said to be nationally representative and (as discussed later) appears to be bias towards larger firms with a high proportion of female managers. Still, the data gathered provide a rich set of findings about the situation of women in business and management, the challenges they face and support measures businesses can implement to mitigate them. Overall, three main trends emerged from the data.

First, garment manufacturers stand out among other businesses as large employers of women both in relative and absolute terms. The garment industry has grown rapidly in recent years and is expected to continue growing as Myanmar becomes more export oriented. Consequently, this is perhaps the largest and most significant industry in terms of formal sector employment for women.

Second, the most common HR policies and practices implemented by firms in the sample do not address the most significant barriers to women in business and management. Respondents ranked “Women have more family responsibilities than men” as the most significant barrier to women in business and management. However, only a small proportion of sampled businesses implement HR policies and practices that could help women to balance the responsibilities of work and family life.

Third, there is a disconnect between the barriers to women in business and management and the support measures that firms would likely implement. Respondents indicated that they would be most likely to implement measures such as “making corporate culture more inclusive towards women” and “assigning women managers visible and challenging tasks”. They also indicated that the most beneficial support they could receive is guidance on measures to promote women in management and evidence on the business case for women in management.

While these are well-intentioned measures that will, no doubt, help to advance women in the workplace, they do not address the most significant barrier that women face. Similarly, many commonly HR policies cited by respondents like “setting specific targets for gender equity” address the visible signs of gender inequity but not the root cause. What is needed, is for businesses to create a work

environment, which recognizes the family and household responsibilities of women and supports them to adequately balance these with their obligations at work. This will open the door for more women to become productive, fully-engaged employees and managers who can advance through the ranks of their company due to their own skills and merit, rather than by gender quotas. Doing so can expand the talent pool within companies and ultimately lead to increased competitiveness and improved business outcomes.

Key Findings

Key findings of the report are given below and divided into thematic groups. Statistical significance is denoted by “*” at the 95% confidence level and “***” at the 99% confidence level.

Employment of Women

- Twenty-six percent of the sampled firms achieved employee gender parity, meaning that 40% to 60% of their workforce is composed of women. Twenty-five percent of sampled firms were disproportionately composed of men, while the remaining 49% of the sample had a workforce disproportionately composed of women.
- Women accounted for 9 out of 10 employees for half of all garment manufacturers in the sample compared to about 6 out of 10 employees for other firms in the sample.
- Garment manufacturers, especially foreign-owned ones, are large employers of women not only in proportional terms but also in absolute terms. Although foreign-owned garment manufacturers account for only 7% of the sample, they employ 33.2% of all female employees in the sample.

Women in Management

- Women accounted for an average of 61% of managers on a firm-by-firm basis.
- Thirty-four percent of sampled firms had achieved gender parity in management, with women comprising between 40% and 60% of all managers. Nineteen percent of firms were disproportionately managed by men, while 46% of firms were disproportionately managed by women. It is important to note, however, that this was primarily caused by a high proportion of junior level female managers within sampled firms.
- The proportion of female managers decreases at each successively higher level of management. On average, 64% of junior level managers in sampled firms are women compared to 53% of executive managers.** This indicates a ‘leaking pipeline’ for women in management positions. As seniority increases the proportion of female managers drops.
- None of the firms in the sample achieved gender parity at each level of management.

Women Ownership

- Sixty-three percent of surveyed firms were majority-owned by women.

- Women owned firms have a higher average female management rate(64%) than firms owned by men (54%).* Subsequent analysis in this report shows that women owned businesses implement more women-friendly HR policies and practices that promote a better work-life balance. One could posit that this naturally attracts female managers, leading to a higher female management rate in women-owned firms.
- Within the sample, female ownership was found to be negatively associated with firm size. Seventy percent of small firms in the sample were owned by women compared to 53% and 47% for medium and large firms.*

Women on Boards

- Of the 119 sampled firms with a board of directors (BOD), women constitute an average of 43% membership. Seven percent of the boards in the sample were composed entirely of women, while 15% had no women at all. Forty-seven percent had 50% or greater women membership.
- There is a positive association between the proportion of women on the board of directors and the proportion of female senior and top executive managers. All other factors held constant, for every 10% increase in the proportion of women on the board of directors, there is an average 3.3% increase in the proportion of female senior and top executive managers.** Although survey data can only indicate correlation and not causality, it is common practice for board members to select senior and executive managers. One could reasonably assume that a higher proportion of female board members leads to a higher proportion of senior and executive female managers.

Human Resources Policies and Practices

- Sampled firms implemented an average of 65% of the HR policies and practices listed in the survey.
- The most common HR practices picked from amongst sampled firms tended to be related to training or an individuals' position within the business. However, HR policies that promote a positive work-life balance and account for women's family responsibilities were less common.
- Approximately half the sample (53%) have a specific policy in place to address sexual harassment, leaving much room for improvement in this critical field.
- HR practices promoting a work-life balance were uncommon across the sample but more common amongst women-owned businesses. This could potentially be one of the reasons women owned businesses have a higher female management rate than businesses owned by men.
- HR practices promoting work-life balance are less common among garment manufacturers than other firms. These include: career breaks (57% vs 86%)*, flexible working hours (40% vs 84%)*, part-time working hours (5% vs 35%)* and child care/elder care (0% vs 23%)*. Most notably, none of the garment manufacturers sampled provide child/elder care. The low

proportion of garment manufactures implementing these policies denotes a business model, which provides little flexibility for female employees to adjust their work schedule around the demands of motherhood and traditional responsibilities of household management. This is concerning as this industry is perhaps the largest formal sector employer of women.

Barriers to Women in Business and Management

- Respondents were asked to rank the most significant barriers to the advancement of women in their respective firms. These rankings were then used to create a weighted composite score.¹ With a composite score of 108, “women have more family responsibilities than men” was found to be the most significant barrier preventing the advancement of women in business and management. This was nearly triple the next highest composite score of 39 for “women with insufficient general or line-management experience”. “Management generally viewed as a man’s job” came in third with a composite score of 32.
- Despite the fact that respondents perceive family responsibilities to be the greatest significant barrier to women, HR policies that promote a work life balance and help women to balance work and family responsibilities are uncommon amongst sampled firms.²
- Garment manufacturers had an average adjusted composite score (AACS) of 49.2 for the barrier “masculine corporate culture” and 15.9 for barrier “women have more family responsibilities than men”. By contrast other firms had an AACS of 15.9 and 4.5 for these barriers. This suggests that a masculine corporate culture and women’s family responsibilities are more significant barriers within garment manufacturing firms than in others. One could reasonably assume that this is linked to the fact that HR policies addressing a work-life balance are not as commonly implemented amongst garment manufacturers as in other firms.

Support Measures for Women in Business and Management

- Respondents indicated “assigning women visible and challenging tasks” was the measure they would most likely implement to support women’s advancement in business and management. This was followed by “making corporate culture more inclusive” and “exposing women to all company operations and functions”.
- Respondents indicated that the most beneficial support they could receive from a representative business organization would be to “identify the business case for women in management.” This was followed by “guides on measures and strategies to promote women in management” and “developing a strategy to promote more women in management”.

¹ Each time a barrier was ranked as the most significant, it was given one point. Each time it was ranked as the second most significant barrier it was given 0.666 points. Each time it was ranked as the third most significant barrier it was given 0.333 points. These were added together to form a composite score for each barrier.

² Respondents chose three barriers out of a list of fifteen. This, by nature, yields average composite scores that are small fractions. For easier analysis an adjusted average composite score is used, which is simply the average composite of a given barrier multiplied by 100.

About the author

The Survey Report was made by Mr Bart Robertson, a development economist who had worked as an independent consultant with the ILO. The survey was implemented in 2018 in cooperation with the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI).

The ILO in Myanmar

The International Labour Organization (ILO) is a specialized United Nations agency that aims to promote decent work. This includes opportunities for work that are productive and deliver a fair income; security in the workplace and social protection on for families; better prospects for personal development and social integration; freedom for people to express their concerns, organize and participate in the decisions that affect their lives; and equality of opportunity and treatment for all women and men. With its unique tripartite composition, the ILO is well placed to assist governments, workers and employers' organizations to address challenges related to sustainable development through sound industrial relations at the enterprise, industry and national levels. The ILO has an ongoing engagement with its tripartite constituents in Myanmar on the basis of an agreed Decent Work Country Programme and has been working to build the capacity of workers' and employers' organizations in Myanmar.

Disclaimer

This publication has been produced with the assistance of the ILO Bureau for Employers' Activities (ILO-ACTEMP) and with support of the ILO Liaison Office in Yangon.

The contents of this publication are the responsibility of Mr. Bart Robertson who has been contracted by the ILO to produce this report.



1. Background and Report Structure

In early 2018 the ILO Company Survey was implemented in Myanmar in partnership with the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI). A non-random sample of 200 enterprises was drawn from UMFCCI affiliate associations, and surveyors administered an abridged version of the original questionnaire that appropriately fit the Myanmar context. This summary report analyses the survey data and provides key findings on the situation of women in business and management in Myanmar. The report structure closely follows that of the abridged questionnaire. Below is a brief description of each section of the report.

- **Methodology:** This section reviews the survey methodology as well as its limitations and the extent to which findings are generalizable.
- **Sample Composition:** This section broadly defines the characteristics of firms within the sample and stratifies the sample into groups of interest based on those characteristics.
- **Women Employment:** The female employment rate (FER) and the rate of gender parity is calculated for sampled firms. These figures are then compared across groups of interest.
- **Women in Management:** The female management rate (FMR) and the rate of gender parity at various levels of management is calculated for sampled firms. These figures are then compared across groups of interest.
- **Human Resources Policies and Practices:** The HR practices of sampled firms are reviewed and compared across groups of interest. The extent to which these HR practices affect women in business and management is also discussed.
- **Barriers to Women in Business and Management:** Respondents' perceptions about the most and least significant barriers affecting the advancement of women in business and management are assessed.
- **Support Measures:** Respondents state which support measures they would be most likely to implement to mitigate barriers to women in business and management. They also state which types of support measures offered by a representative organization would be most beneficial.
- **Conclusion:** This section summarizes three main trends from the survey data.

2. Methodology

Questionnaire Design

The questionnaire is an abridged version of the ILO's Global Company Survey questionnaire. It was modified from the original version in consultation with subject matter experts and UMFCCL staff to develop a finalized questionnaire that is contextually appropriate and accurately captures the gender dynamics of women in business and management in Myanmar. The finalized questionnaire consists of 18 questions and can be found in Appendix A.

Sampling

When possible, enterprise surveys implement stratified, random sampling based on a centralized database of all formally registered enterprises. Stratification is often based on firm sector and level of employment (i.e. firm size), so that the sample mirrors the population with respect to these criteria. No such database exists in Myanmar. Formal enterprises are registered with one of three or more government bodies.³ Furthermore, the cutoff values for firm size categories vary by sector. The World Bank estimates that there are approximately 29,000 formal enterprises within Myanmar that are registered with at least one government body. These enterprises are divided into 80% small, 16% medium and 4% large.⁴

The universe of consideration for this survey was formal non-agrarian enterprises that are members of affiliate associations of the UMFCCL. A sample of 200 enterprises was selected using a stratified, mixed-methods approach, which drew from 8 of UMFCCL's 76 affiliate associations.

³ These are: 1. The Directorate of Investment and Company Administration (DICA), 2. The Directorate of Industrial Supervision and Inspection of the Ministry of Industry, and 3. City Development Committees or the Department of Development Affairs.

⁴ World Bank Group, Myanmar Investment Climate Assessment: Sustaining Reforms in a Time of Transition (Yangon: World Bank Group, January 2015), p. 60

These figures do not include microenterprises with 1 to 4 employees. If so, proportions change to: 59% micro, 33% small, 6% medium and 2% large. It is also estimated that 20% of firms have no form of registration.

Table 1: Affiliate Associations

Affiliate Association	Acronym	Sample	Method	Random
Myanmar Women Entrepreneurs Association	MWEA	32	Membership List	Yes
Myanmar Young Entrepreneurs Association	MYEA	31	Membership List	Yes
Myanmar Tourism Federation or Myanmar Hoteliers Association	MTF or MHA	31	Industry Directory	No
Myanmar Garment Manufacturers Association	MGMA	27	Membership List	Yes
Myanmar Retailers Association (Yangon)	MRA	25	Membership List	Yes
Myanmar Retailers Association (Mandalay)	MRA	22	Association Selection Industry	No
Myanmar Industries Association	MIA	24	Directory Association	No
Mandalay Region Chamber of Commerce and Industry	MRCCI	8	Selection	No

Four of these associations are sectoral in nature while three (the MWEA, MYEA and MRCCI) are cross-sectoral. The MWEA and MYEA were included to ensure that the perspectives of these populations of interest were captured, while the MRCCI was included in the survey to ensure an adequate sample size of Mandalay-based businesses. In cases where an affiliate association had a membership list, the list was used to construct a sampling frame from which a random sample was drawn. In cases where a membership list did not exist, surveyors identified enterprises through an industry directory. The directories do not contain all businesses within the industry and are available in hardcopy only, preventing the surveyors from constructing a sampling frame and conducting random sampling. In other cases, an affiliate association helped identify which of its members would participate in the survey and provided a non-randomized list to the survey team.⁵

Geographic coverage

The sample includes enterprises from the two largest industrial centers in the country; Yangon and Mandalay City. Yangon and Mandalay City represent not only the majority of industrial activity in the country but also the vast majority of large, formal, industrial enterprises. Mid-sized, regional cities were not included in the sample due to time and resource constraints.

⁵ Enterprise membership in affiliate associations is overlapping, meaning that firms that are members of multiple associations have a higher chance of being included in the sample. This is another consideration that prevents the overall sampling process from being considered as random.

Survey implementation

The UMFCCI Training and Research Officer provided questionnaire training to a team of five enumerators from January 15th to the 16th. This was followed by fieldwork, which took place from January 17th to March 8th. Two of the surveyors were also responsible for data cleaning and entry, which took place in two phases February (5th-9th) and March (5th-8th). The Training and Research Officer reviewed the dataset with one enumerator to logic check entries and ensure the data were coded properly. When necessary, follow up phone calls to respondents were used to clarify any concerns or uncertainty about the data. The finalized dataset was provided to an external economist for analysis and findings are given in the following report.

Generalizability of findings

Both the limited geographic scope of the survey and the non-random sampling method produced a sample that is not nationally representative. A non-response bias from firms not interested in issues related to women in business and management is also likely. When comparing survey findings to nationally representative surveys (discussed later), it appears that the sample is bias towards large firms with a high proportion of female managers. The proportion of female-owned businesses in the sample is also quite high.

Analysis of survey data revealed many findings that pass mathematical standards for being ‘statistically significant’. Throughout this report, “*” indicates findings that are statistically significant at the 95% confidence level (p-value < 0.05), and “**” indicates statistically significant findings at the 99% confidence level (p-value < 0.01). However, these findings cannot be generalized to the wider population with absolute certainty, because the survey is not nationally representative. Rather ‘statistically significant’ findings in this survey only indicate that similar findings may exist at the national level.

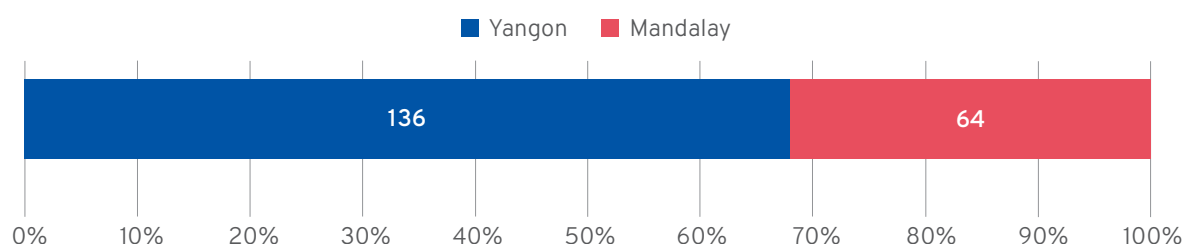
3. Sample Composition

The section below provides an overview of sample composition in terms of geographic location, ownership, sector classification, enterprise size and gender of the respondent. It introduces several grouping variables that divide the sample into groups of interest. The differences between these groups on key indicators will be assessed throughout this report.

Geographic location

The sample consisted of a total of 200 firms. Roughly two-thirds of the sample came from Yangon City and the other third from Mandalay City. Within these cities the survey covered a total of 32 townships; 27 in Yangon City and 5 in Mandalay City. Each of the townships accounted for 1% to 5.5% of sampled firms with the exception of Chanayethazan (city centre) at 14.5% and Maha Aungmye at 8%. A full list of townships surveyed can be found in Appendix B.

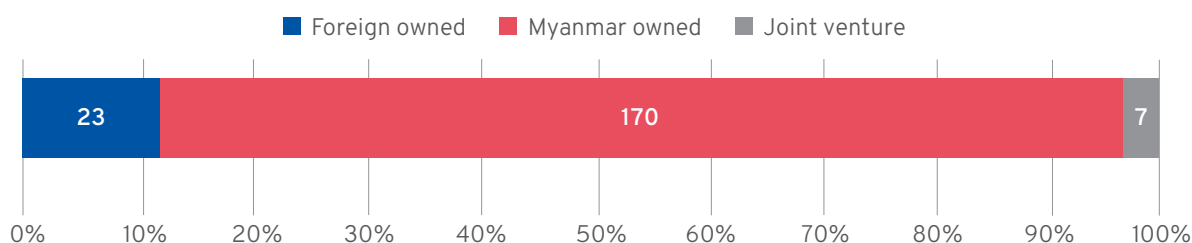
Chart 1: Geographic Location



Ownership

The large majority of firms in the sample (85%) are Myanmar owned businesses, while 11.5% are foreign owned and 3.5% are joint ventures.

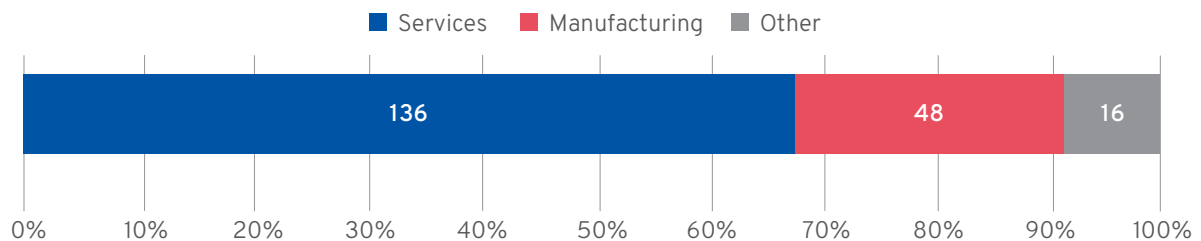
Chart 2: Ownership



Firm classification by sector

Firms in the sample span a wide range of industrial activities and can be classified into 30 specific industrial sectors according to the International Standard Industrial Classification (ISIC Rev. 4). To aid in analysis, firms are categorized by sector throughout this report. These include; services, manufacturing and 'other' which account for 68%, 24% and 8% of firms in the sample.⁶ This report uses the same sectoral classification methodology as the World Bank Enterprise Survey (ES) to allow for direct comparisons.⁷

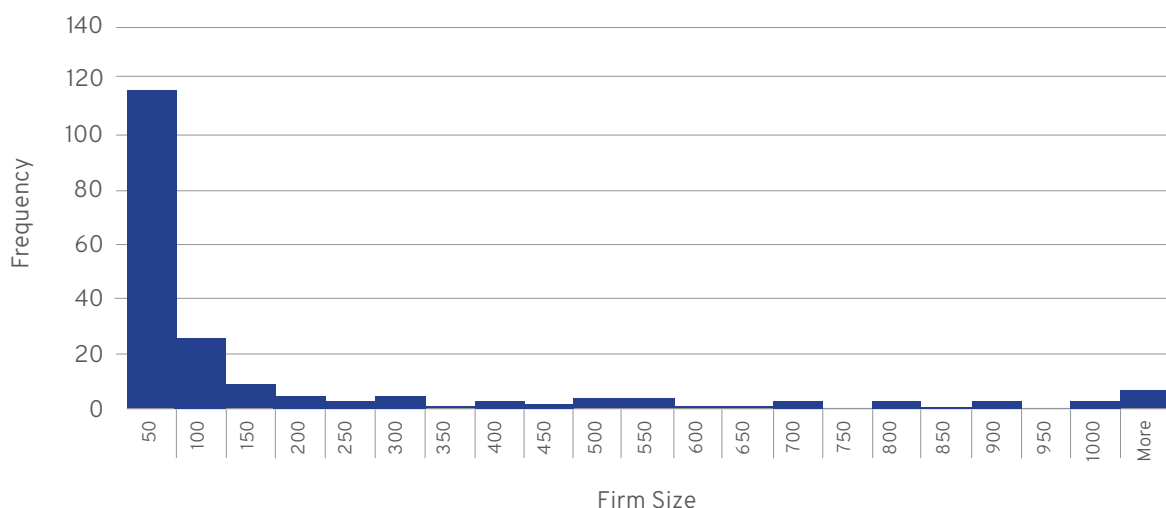
Chart 3: Firm Classification by Sector



Firm size

Firms in the sample range greatly in size from 2 to 8,000 employees.⁸ The average number of employees per firm is 251; though the distribution of firms by total employees is extremely skewed to the right with a few dozen very large firms pulling up the average. It is better to assess firm size using more robust measures of central tendency such as the median. Of sampled firms, 50% have less than 37 employees, while the remaining 50% have over that amount.

Figure 1: Histogram of Firm Size



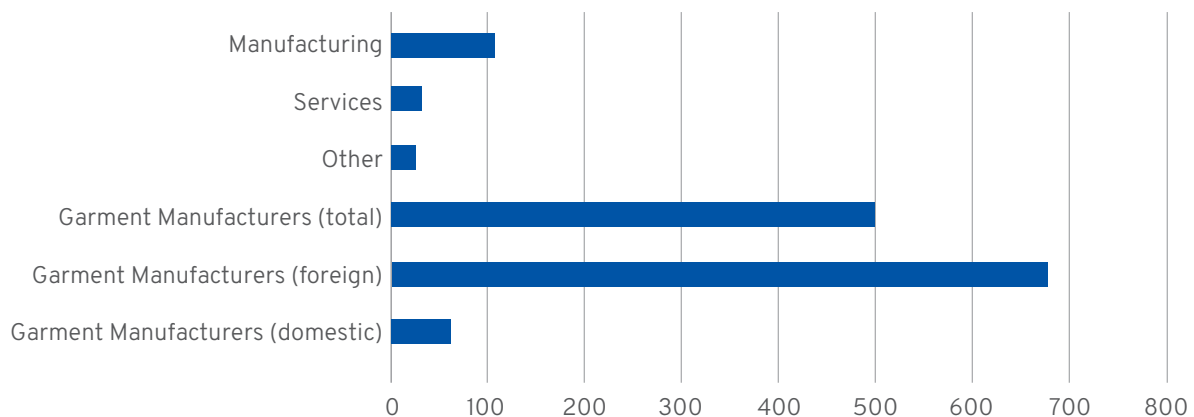
⁶ The sample contained 21 garment manufactures, accounting for 44% of the total manufactures in the sample. The characteristics of this subgroup are explored throughout this report.

⁷ For more information on World Bank methodology for firm categorization by sector see <http://www.enterprisesurveys.org/methodology>.

⁸ This is calculated as full-time permanent worker plus equivalent full-time workers.

Firm size varies greatly by sector. Manufacturing firms have a median of 105 employees; more than triple that of service and other firms at 31 and 26. This is mostly due to a subset of 21 garment manufacturers with a median of 500 employees. It is also important to note that two-thirds of the garment manufacturers in the sample are foreign owned. These foreign owned garment manufacturers are substantially larger than domestic ones with medians of 678 and 61 employees respectively.

Chart 4: Median Firm Size by Sector

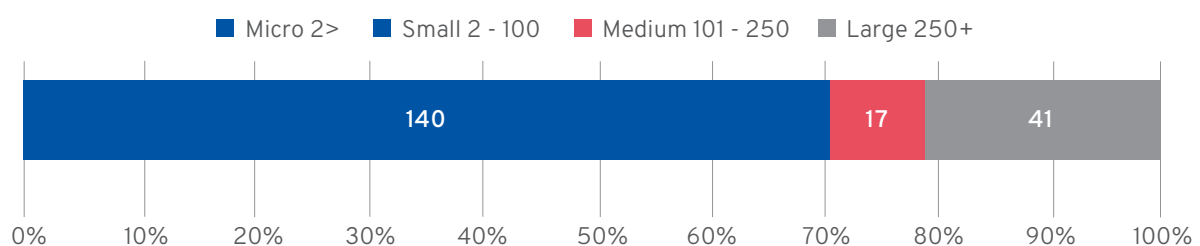


The garment industry in Myanmar has expanded rapidly since a series of economic reforms in 2012 and it is expected to continue to grow and represent perhaps the most significant industry for female employment in the formal economy. Consequently, garment manufacturers are a group of particular interest that will be discussed throughout this report.

Firm size categories

The ILO Company Survey divides firms into four size categories based on their number of full-time and full-time equivalent employees; micro (< 2), small (2 – 100), medium (101 – 250) and large (250 +). Under this system, 68% of firms in the sample can be classified as small, 8.5% as medium, and 23% as large.⁹ There were no microenterprises in the sample.

Chart 5: Firm Size by Category



⁹ Two firms did not provide adequate information on the number of full-time and full-time equivalent employees or on the number of managers. They are not included in the chart above or any subsequent calculations of firm employment such as female employment rate.

In Myanmar, there is neither a census of registered firms nor solid data on firm size. This makes it difficult to compare the sample to the wider population. The World Bank estimates that out of all registered firms in Myanmar, 80% are small, 16% are medium and 4% are large.¹⁰ World Bank cutoff values for these groups are different than the ones used in this survey. Applying the World Bank cutoff values to this sample results in 28% small, 39% medium and 33% large firms.

Table 2: WIBM Sample vs Population Estimates

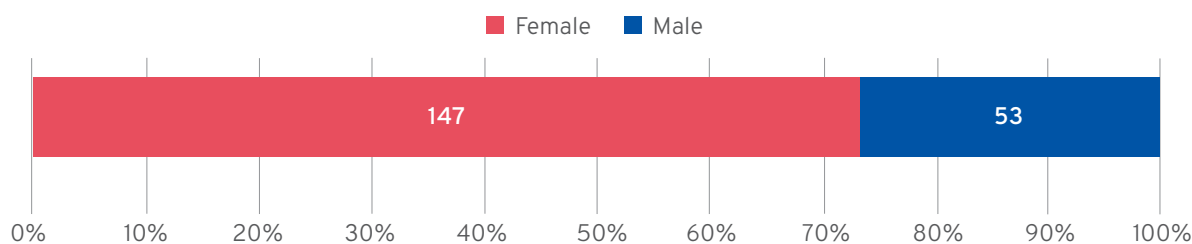
Firm Size	Sample	Population Estimates
Small	28%	80%
Medium	39%	16%
Large	33%	4%

The differences between this sample and World Bank estimates suggest that the sample is heavily bias towards medium and large firms. This is likely due to the non-random sampling method used and the limited geographic coverage of the survey. The survey took place in the two largest cities in the country where large firms constitute a larger proportion of the firm population. Consequently, large firms are more likely to have been included in the sample than if the survey had also covered smaller cities.

Gender of respondent

The gender of the respondent was also recorded. This variable is used in later analysis to contrast perceptions of men and women on subjective topics, such as the barriers faced by women in business and management.

Chart 6: Gender of Respondent



The proportion of female respondents was far greater than male respondents (73.5% vs 26.5%). This can likely be attributed to two factors. First, women constitute an average of 61% of the managers in the sample, and 63% of sampled firms are owned by women. Respondents were either managers or business owners, so one could expect a higher proportion of women to respond than men. Second, managers within a firm could view answering a survey about women in business and management as a task best suited for a female manager.

¹⁰ World Bank Group, Myanmar Investment Climate Assessment: Sustaining Reforms in a Time of Transition (Yangon: World Bank Group, January 2015), p. 60
This estimate excludes registered micro enterprises with 1- 4 employees.

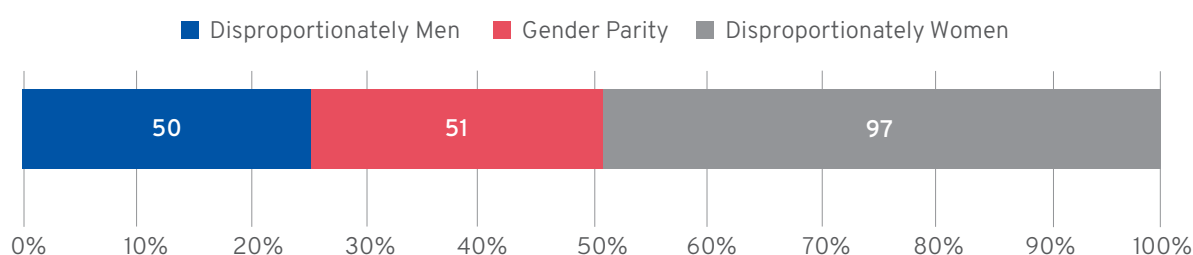
4. Women Employment

Respondents were asked to report the number of men and women full-time employees and full-time equivalent employees.¹¹ This was used to calculate the female employee rate (FER) on a firm-by-firm basis. Note that this is not equivalent to the number of total male and female employees in the sample divided by the sample total. Doing so would give disproportional weight to large firms with more employees. Calculating this rate on a firm-by-firm basis provides equal weight to all firms.

Gender Parity

The average female employment rate (FER) was 60% with wide variation across the sample. Four percent of enterprises were entirely staffed by women, while all firms in the sample had at least one female employee. The ILO defines gender parity as having an employment rate between 40% and 60% for either sex. By this standard, 26% of the sampled firms achieved gender parity. Twenty-five percent of sampled firms had an FER less than forty percent, meaning that they were disproportionately staffed by men. At the same time, 49% of sample firms had a FER above 60% and were therefore, disproportionately staffed by women.

Chart 7: Gender Parity

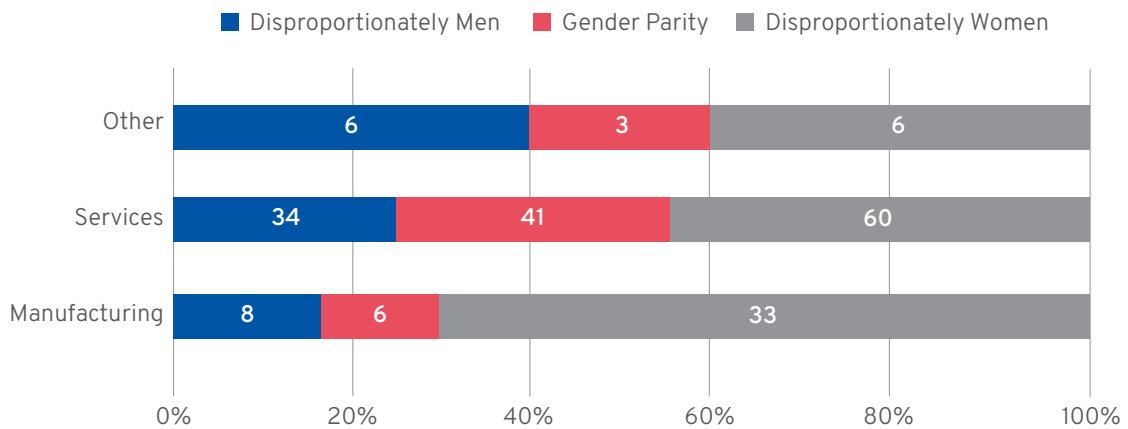


Female employment rate across groups of interest

Manufacturing firms employ a high proportion of female workers relative to other sectors. The average FER for manufacturers was 71% compared to 58% for services and 49% for other sectors.* Applying ILO standards for gender parity, 70% of manufacturing firms in the sample were disproportionately staffed by women compared to 44% of service firms and 40% for firms from other sectors.

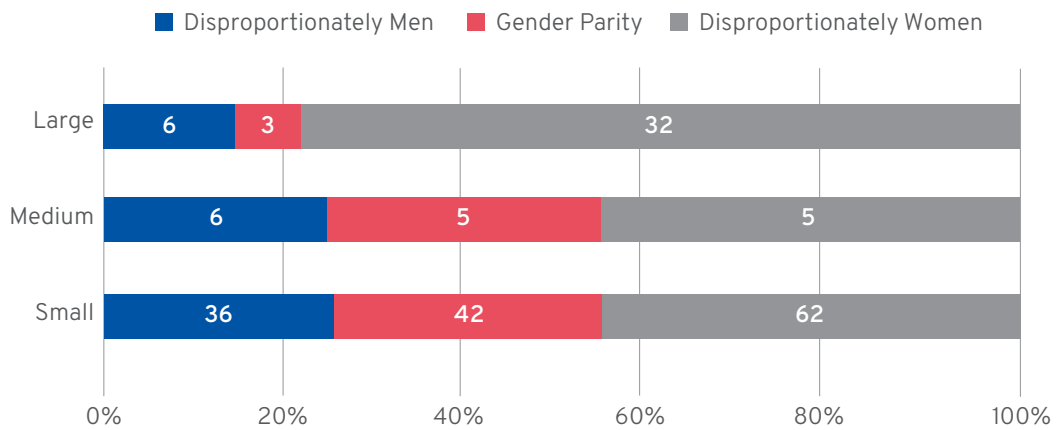
¹¹ Full-time equivalent employee is calculated by dividing the total number of seasonal/temporary employees by the average proportion of months worked out of a year. For example, 12 seasonal employees working an average of 2 months out of a year would be equal to 2 full-time equivalent employees.

Chart 8: Employment Gender Parity by Sector



The data also indicate a positive relationship between the proportion of female employees and firm size. Large firms had an average FER of 76% compared to 51% and 57% for medium and small firms. This resulted in 78% of large firms being disproportionately staffed by women, while only 7% achieved gender parity. By contrast 44% of small firms were disproportionately staffed by women. The positive relationship between firm size and FER is all the more apparent when applying regression analysis. When all other variables are held constant there is an average increase in the FER of 14.6% for every additional 100 employees.*

Chart 9: Employment Gender Parity by Firm Size



The World Bank ES also detected a positive relationship between firm size and the proportion of female employees.

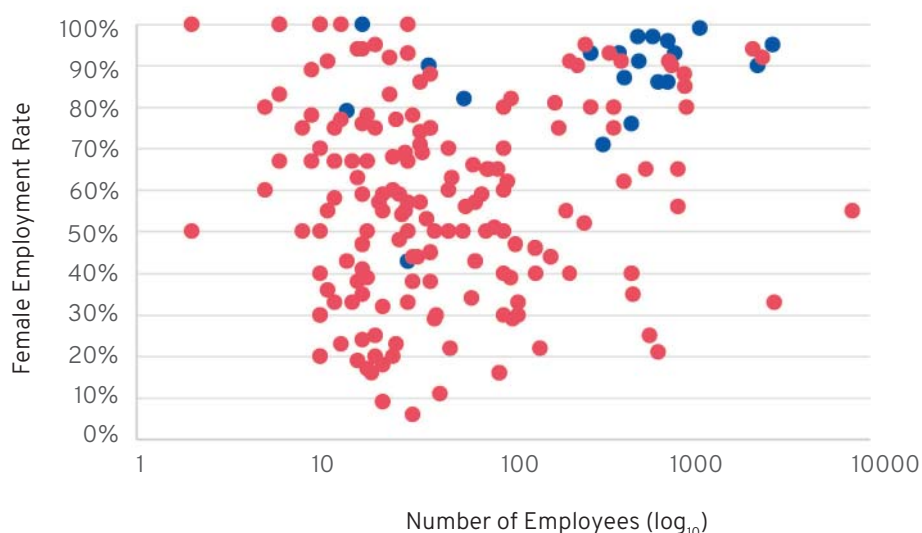
“About a third of full-time workers are female, in Myanmar and on average in other countries. Interestingly, however, large firms have workforces comprising over 60 percent women, far more than smaller firms and more than the international average.”¹²

The high FER seen in manufacturing firms and large firms in the sample is primarily driven by garment manufacturers. If garment manufacturers are removed from the regression analysis the association between FER and firm size is greatly reduced and no longer statistically significant. The median FER is 90% amongst garment manufacturers compared to 57% for all other firms in the sample. In other words, women accounted for 9 out of 10 employees for half of all garment manufacturers in the sample.

Shown another way, the scatterplot below charts firm size on a logarithmic scale against the FER for 198 of firms sampled. Most of the garment manufacturers (blue dots) can be found in a cluster to the top right of the plot. They have approximately 300 employees or more and an FER of 70% or higher. Garment manufacturers, especially foreign-owned ones, are large employers of women not only in proportional terms but also in absolute terms. Although foreign-owned garment manufacturers account for only 7% of firms in the sample, they employ 33.2% of all female employees in the sample.

These findings suggest that the policies and practices put in place by foreign garment manufacturers will have perhaps the most significant impact on the future of female, formal sector employment in Myanmar.

Figure 2: Scatter Plot FER by Firm Size



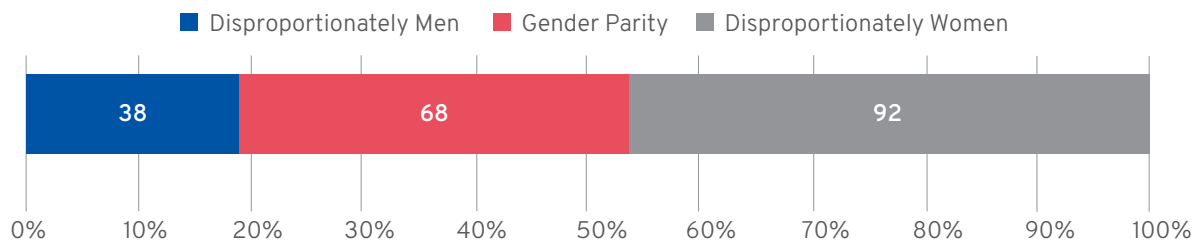
¹² World Bank Group, Myanmar Investment Climate Assessment: Sustaining Reforms in a Time of Transition (Yangon: World Bank Group, January 2015), p. 10

5. Women in Management

Female Management Rate

The survey also recorded the number of male and female managers in each firm in order to calculate a female management rate (FMR) on a firm-by-firm basis. Sampled firms had an average FMR of 61%, and 34% of firms had achieved gender parity in management with an FMR between 40% and 60%. At the same time, 19% of firms were disproportionately managed by men (FRM < 40%) and 1.5% were heavily disproportionately managed by men (FRM < 10%). Conversely, 46% of firms were disproportionately managed by women (FRM > 60%) and 15.7% of firms were heavily disproportionately managed by women (FRM > 90%).

Chart 10: Gender Parity in Management



According to the ILO Labour Force Survey for Myanmar, women constitute 43% of total labour force. These findings suggest that the proportion of women in management (61%) is actually higher than the proportion of women in the labor force. It is likely that the high proportion of female managers within the sample is, at least in part, due to a high non-response bias of firms that are managed by men. While an FMR over 50% is possible, it is not common. The ILO Company Survey found this to be the case in some countries such as the Philippines. It also found three countries in which women constitute more than 50% of managers.

Despite a high FMR relative to samples from other countries, it is important to note that the FMR still drops at each successively higher level of management. On average, 64% of junior level managers in sampled firms are women compared to 53% of executive managers. The difference between these averages is statistically significant at the 99% confidence level.

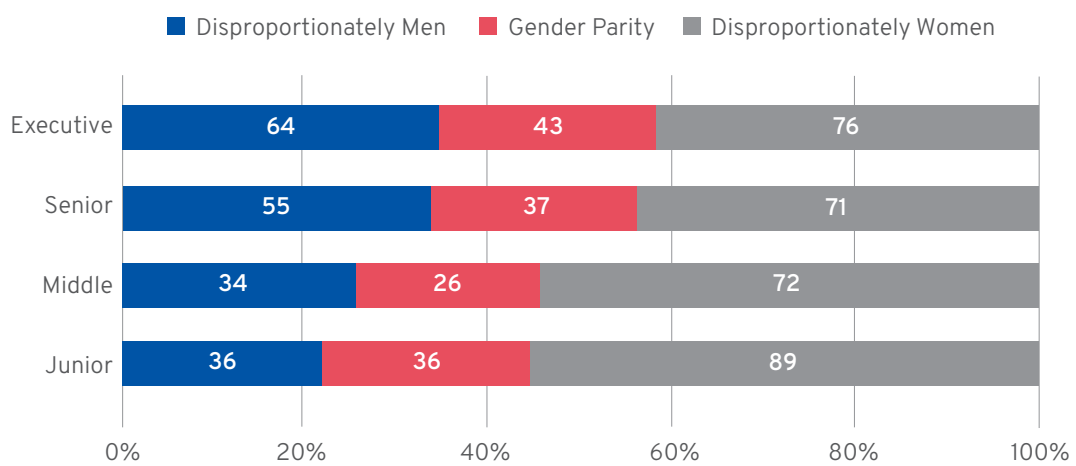
Table 3: Average Female Management Rate by Management Level

Management Level	Average Female Management Rate
Executive	53%
Senior	55%
Middle	61%
Junior	64%

These findings indicate a 'leaking pipeline' for women in management positions. As seniority increases the proportion of female managers drops. This leaves a relatively smaller pool of qualified female candidates for top CEO positions. It is interesting that even in this sample, with an average FMR of 53% for executive managers, the leaky pipeline phenomenon still exists.

As one might expect, this trend impacts gender parity at each level of management. As seen in the chart below, the proportion of firms that are disproportionately management by men increase at each successively higher level of management from 22% at the junior level to 35% at the executive level. It is important to note that no single firm in the sample had achieved gender parity at each level of management.

Chart 11: Gender Parity by Level of Management



Female management rate across groups of interest

The female management rate was compared across firm size and sector as well as several other grouping variables. A summary of key findings is given below.

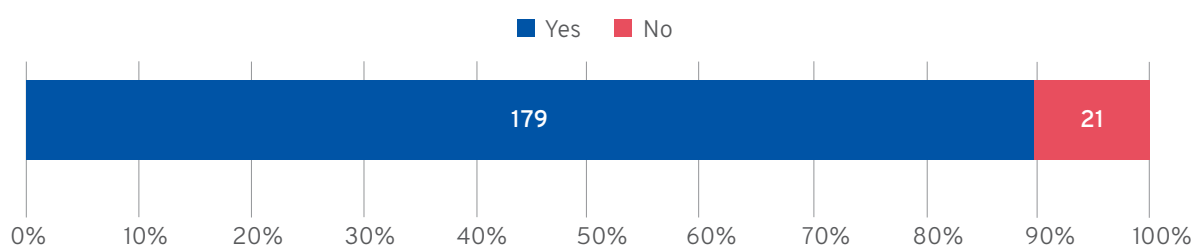
- Female-owned firms in the sample had a higher FMR than male-owned firms. Twenty-eight percent of firms owned by men are disproportionately managed by men compared to only 14% of firms owned by women.* Interestingly, the rate of gender parity remained the same (34%) for both male and female owned firms. This suggests that women owned business have a greater tendency to be disproportionately managed by women rather than achieve gender parity. (see table xx).
- The average FMR of women-owned firms is 64% compared to 54% for firms owned by men.*
- Whether or not a business is female owned will account for 45% of the variance in the FMR when all other factors are held constant.*
- Ninety percent of garment manufacturers in the sample were disproportionately managed by women. Conversely, only 41% of other firms were disproportionately managed by women.* This is primarily due to the high FMR at lower management levels. Garment manufacturers had an average female management rate of 84% at the junior management level compared

to 60% for other firms in the sample.** At each successively higher level of management, the female management rate for garment manufacturers shrank more rapidly than it did for other enterprises. At the executive level, garment manufacturers actually had a lower average female management rate (46%) than other firms in the sample (54%).

Management of day-to-day operations

It is important to determine not only the proportion of female managers within each firm but also the extent to which women are involved with daily business operations. To this end, respondents were asked if the management and daily business operations within their firm are controlled by one or more women.

Chart 12: Women Management in Day-to-Day Operations



Ninety percent of sampled enterprises have one or more women managing daily business operations. This proportion did not vary significantly by sector or firm size. While this figure may seem unusually high, surveyors phrased the question in an inclusive rather than exclusive manner. In other words, 90% of respondents stated that women are in some way involved in the management of day-to-day operations within their respective firms.

Woman ownership

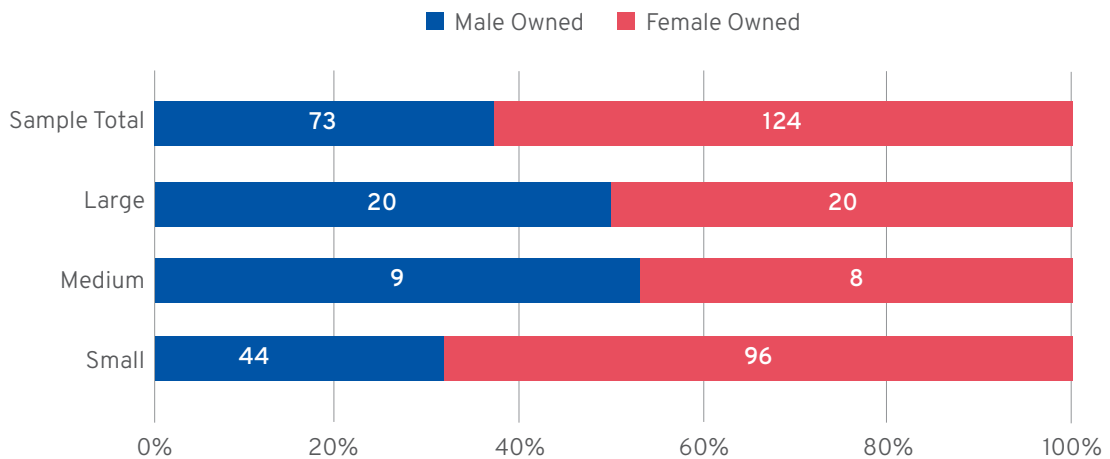
Sixty-three percent of surveyed firms were majority-owned by women.¹³ This is considerably higher than findings from the World Bank ES, which found a female ownership rate of 33.5% for Myanmar and 28.6% for East Asia and the Pacific Region.¹⁴ Within the sample, female ownership was found to have a negative relationship with firm size. Sixty-nine percent of small firms in the sample were owned by women compared to 47% and 50% for medium and large firms.^{15*} It's also important to note that women owned firms have a higher average female management rate(64%) than firms owned by men (54%).* Subsequent analysis in this report shows that women owned businesses implement more women-friendly HR policies and practices that promote a better work-life balance. One could posit that this naturally attracts female managers, leading to a higher female management rate in women-owned firms.

¹³ This is defined as having women own 50% or more of the firm.

¹⁴ WB Enterprise Survey Database. Accessed 20 March 2018.
Note that World Bank figures only account for manufacturing firms only.

¹⁵ There were 197 valid responses. One respondent did not know whether or not women owned 50% or more of the business. Two respondents did not provide adequate information on employee numbers.

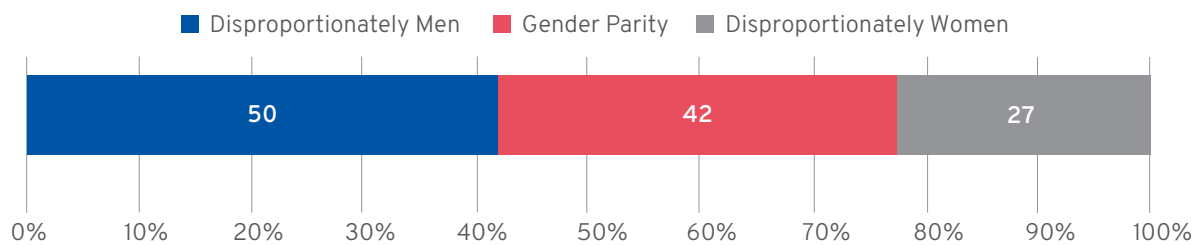
Chart 13: Business Ownership by Gender



Women on the board of directors

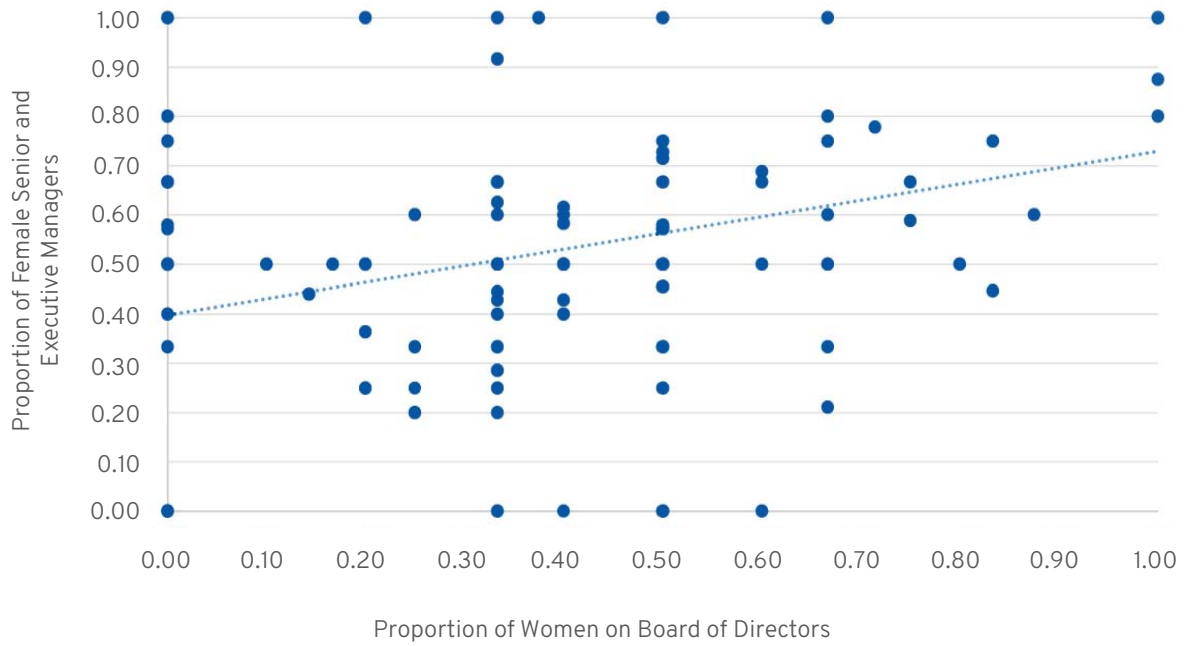
Out of 200 enterprises sampled, 119 of them had a board of directors (BOD). Seven percent of those boards were composed entirely of women, while fifteen percent had no women at all. Thirty-five percent of sampled boards achieved gender parity with a female membership rate between 40% and 60%, while 42% had disproportionately high male membership and 23% had disproportionately high female membership. Nearly half (47%) of BODs in the sample had over 50% female membership.

Chart 14: Gender Parity on Board of Directors



Regression analysis revealed a positive relationship between the proportion of women on the board of directors and the proportion of female senior and top executive managers. All other factors held constant, for every 10% increase in the proportion of women on the board of directors, there is an average 3.3% increase in the proportion of female senior and top executive managers.** Although analysis of survey data can only indicate correlation and not causality, it is common practice for board members to select senior and executive managers. Therefore, it is reasonable to assume that a higher proportion of female board members leads to a higher proportion of senior and executive female managers.

Figure 3: Scatter Plot Proportion of Senior and Executive Women Managers by Proportion of Women on BOD



6. Human Resources Policies and Practices

In order to better understand common human resources (HR) practices in Myanmar and how they impact women in business and management, respondents were given a list of 15 HR policies/practices and asked which, if any, their respective enterprises implement.

Most widely implemented HR policies and practices

Sampled firms implemented an average of 65% of the policies and practices listed. The most common HR practices picked from the list relate to training or an individuals' position within the business. "Recruitment, retention and promotion" policies topped the list and were implemented by 98% of sampled firms. "Mentoring" and "skills training/executive training" were also common at 97% and 75%. It is promising to note that "specific strategies that include targets for gender and diversity" for both entry/mid-level employees and senior level management were commonly implemented by 84% at 82% of the sample respectively.

However, with the exception of "career breaks" (83%) and "flexible working hours" (80%), HR policies that promote a positive work-life balance and account for family responsibilities of women were less common. Only 20% of sampled firms implemented a "child/elder care" policy. Similarly, providing maternity leave or paternity leave past legal requirements were also uncommon amongst sampled firms (48% and 27%). As discussed in later sections of this report, respondents perceived family responsibilities to be the most significant barrier facing women in business and management. One would hope that if companies perceive this as a significant barrier, they would implement appropriate HR policies to mitigate it. It is also important to note that approximately half the sample (53%) have a specific policy in place to address sexual harassment, leaving much room for improvement in this critical field. Without a more common uptake of policies that account for women's double burden and safeguard against sexual harassment, the effectiveness of well-intentioned targets for gender and diversity inclusion may be undermined.

Table 4: HR Policies and Practices

HR Policy/Practice	% of Valid Responses
Recruitment, retention and promotion	98%
Mentoring	97%
Re-entry programmes	84%
Specific strategy that includes targets for gender diversity/ inclusion at entry or mid-level	84%
Career breaks	83%
Specific strategy that includes targets for gender diversity/ inclusion at senior-management level	82%
Flexible working hours	80%

HR Policy/Practice	% of Valid Responses
Remuneration	77%
Skills training/executive training	75%
Prevention of sexual harassment	53%
Maternity leave (beyond requirements in the law)	48%
Part-time working hours	32%
Remote work or telework	31%
Paternity leave (beyond requirements in the law)	27%
Child care/elder care	20%

Amongst sampled firms, businesses owned by men were less likely than businesses owned by women to implement HR policies related to work-life balance. Twenty-two percent of firms owned by women had child/elder care policies in place compared to fifteen percent for firms owned by men. The proportion of firms owned by women that offer maternity and paternity leave beyond legal requirements was 52% and 31%. This was higher than the figure for firms owned by men at 42% and 23%. Furthermore, 88% of women-owned firms provide career breaks compared to 75% of firms owned by men.* The consistently higher proportion of women-owned businesses implementing HR practices promoting a work-life balance suggests a positive relationship between women ownership and HR policies that are conducive to advancing women in business and management.

Table 5: HR Policies and Practices by Male and Female Owned Firms

HR Policy/Practice	Women Owned	Men Owned	Difference (Women - Men)
Recruitment, retention and promotion	98%	99%	-1%
Mentoring	98%	95%	3%
Re-entry programmes	83%	86%	-3%
Specific strategy that includes targets for gender diversity/inclusion at senior-management level	82%	83%	-1%
Specific strategy that includes targets for gender diversity/inclusion at entry or mid-level	85%	82%	3%
Remuneration	75%	79%	-4%
Flexible working hours	82%	76%	6%
Career breaks*	88%	75%	13%

HR Policy/Practice	Women Owned	Men Owned	Difference (Women - Men)
Skills training/executive training	78%	70%	8%
Prevention of sexual harassment	50%	57%	-7%
Maternity leave (beyond requirements in the law) ¹⁶	52%	43%	9%
Part-time working hours	31%	32%	-1%
Remote work or telework	35%	24%	11%
Paternity leave (beyond requirements in the law)	31%	23%	8%
Child care/elder care	22%	15%	7%

As previously discussed, garment manufacturers constitute a subgroup of particular interest. They tend to be large businesses with a workforce largely composed of female employees. The garment industry has also expanded rapidly in Myanmar within the last few years and is expected to continue to do so as the country becomes more export oriented. Consequently, the HR policies put in place by garment manufacturers will have significant impact for women employed within the formal economy.

There are several key policies related to work-life balance that are implemented by a lower proportion of garment manufacturers than by other firms. These include: career breaks (57% vs 86%)*, flexible working hours (40% vs 84%)*, part-time working hours (5% vs 35%)* and child care/elder care (0% vs 23%)*. The low proportion of garment manufactures implementing these policies denotes a business model, which provides relatively little flexibility for female employees to adjust their work schedule around the demands of motherhood and traditional responsibilities of household management. On a positive note, 100% of garment manufacturers in the sample have re-entry programmes compared to 82% for other firms. Furthermore, 74% of garment manufactures were found to have a policy in place for the prevention of sexual harassment compared to only 50% for other firms.

¹⁶ The Leave and Holiday Act of Myanmar (amended 2014) states that women have the right to take six weeks of maternity leave prior to birth and eight weeks of maternity leave afterwards. Fathers have the right to take 15 days leave after the birth.

Table 6: HR Policies and Practices Garment Manufacturers vs Other Firms

HR Policies/Practices	Garment Manufacturer	Other Firms	Difference (GM - Other)
Recruitment, retention and promotion	100%	98%	2%
Mentoring	100%	96%	4%
Re-entry programmes*	100%	82%	18%
Specific strategy that includes targets for gender diversity/inclusion at entry or mid-level	86%	84%	2%
Specific strategy that includes targets for gender diversity/inclusion at senior-management level	80%	83%	-3%
Prevention of sexual harassment	74%	50%	24%
Remuneration	71%	78%	-7%
Skills training/executive training	65%	76%	-11%
Career breaks*	57%	86%	-29%
Flexible working hours*	40%	84%	-44%
Maternity leave (beyond requirements in the law)	40%	49%	-9%
Remote work or telework	14%	33%	-19%
Paternity leave (beyond requirements in the law)	10%	30%	-20%
Part-time working hours*	5%	35%	-30%
Child care/elder care*	0%	23%	-23%

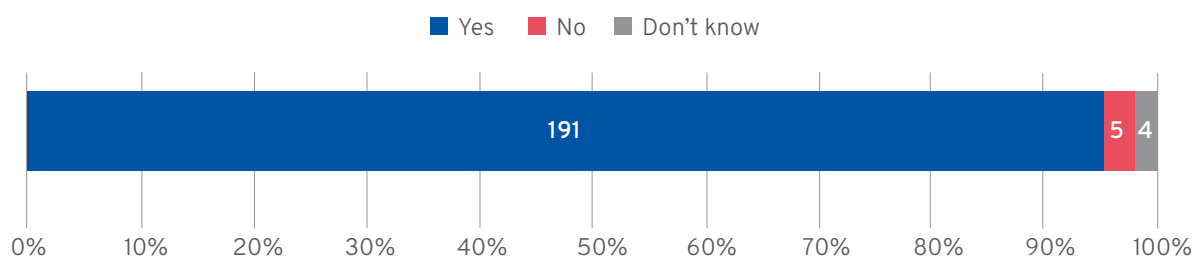
HR policies and practices were also compared across sector and firm size categories. Several statistical significant differences between groups were identified.

- Part-time work policies seemed to be far less common in the services sector (32%) and manufacturing sector (21%) than in other sectors (63%).*
- Re-entry programmes were more common for manufacturers (96%) than service firms (81%).*
- Both career breaks and re-entry programs are more common in large firms (88% and 98%) than small firms (65% and 80%).*
- Policies for flexible working hours are less common for large firms (63%) than small firms (86%).*

Effect of HR policies on business outcomes

Respondents were also asked if the HR policies they implemented have improved businesses outcomes. The overwhelming majority of the sample (95.5%) responded that their HR policies and practices had, in fact, improved business outcomes. Unfortunately, given the structure of this and the previous survey question, it is not possible to determine which of the HR policies listed actually led to improved business outcomes.

Chart 15: HR Policies and Practices Effect on Business Outcomes



Respondents were also shown a list of potential ways their business could improve through HR policies and practices and asked to tick the options relevant to their firm. Options A through E each received between 21% and 17% of the total ticks, which indicates that each of the types of performance improvement listed were approximately equally likely to happen.¹⁷

¹⁷ The types of performance improvement in the table are listed in the same order as they appeared on the questionnaire. The percent of total ticks is highest for the first option listed on the questionnaire and decreases after that. This pattern could suggest that respondents were not paying close attention to this question and assigned tick marks without appropriately considering each option.

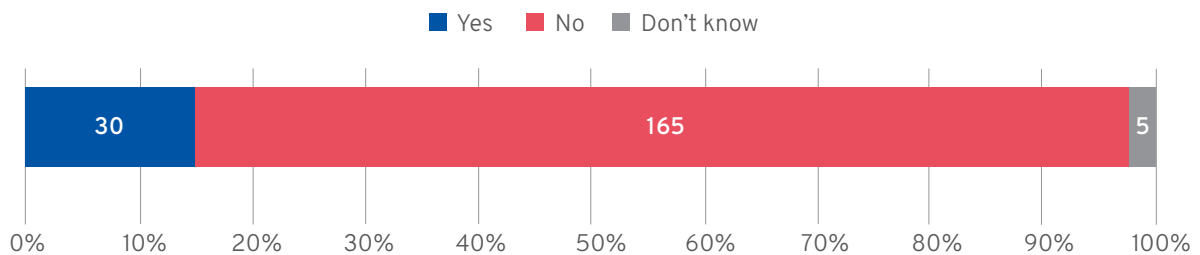
Table 7: Types of Improvement

Code	Type of Improvement	Ticks	% of Total Ticks
A	Improved business performance, including profitability and productivity	121	21%
B	Increased ability to attract and retain talent	113	20%
C	Enhanced company reputation	115	20%
D	Greater creativity, innovation and openness	102	18%
E	Better ability to gauge consumer interest and demand	99	17%
F	Other	23	4%

Equal opportunity policy and diversity inclusion policy

Eighty-two point five percent of sampled firms stated that they have an equal opportunity policy or a diversity and inclusion policy while 15% stated that they did not and 2.5% stated that they did not know. Due to the manner in which the question was asked, it is unclear how many of the sampled firms have an equal employment opportunity policy, how many have a diversity and inclusion policy or how many have both. It also seems unlikely that 82.5% of sampled firms have an equal opportunity or diversity inclusion policy, particularly given the informal manner in which many of small firms tend to operate. It is possible that some respondents misinterpreted this question as whether or not they have any HR policies.

Chart 16: Equal Opportunity or Diversity Inclusion Policy



7. Barriers Faced by Women in Business and Management

The survey captured respondents' perceptions of the barriers faced by women in business and management. Respondents were shown a list of 15 barriers and asked to rank the three most significant and three least significant barriers that prevent women from advancing in their respective companies. This list is given below along with a corresponding code letter for each barrier that will be used in the following analysis.

Table 8: Barriers and Coding

Code	Barrier
A	Roles assigned by society to men and women
B	Women with insufficient general or line management experience
C	Few role models for women
D	Masculine corporate culture
E	Women have more family responsibilities than men
F	Lack of company equality policy and programmes
G	Gender equality policies in place but not implemented
H	Men not encouraged to take leave for family responsibilities
I	Inherent gender bias in recruitment and promotion
J	No strategy for retention of skilled women
K	Lack of leadership training for women
L	Stereotypes against women
M	Inadequate labour and non-discrimination laws
N	Management generally viewed as a man's job
O	Lack of flexible work solutions

Barrier E, "Women have more family responsibilities than men" was ranked as the most significant barrier by 41% of respondents. It was also ranked as the second most significant barrier by 16% of respondents and the third most significant barrier by 13% of respondents. Eleven and nine percent of respondents cited barrier B and A "women have insufficient line management experience" and "roles assigned by society to men and women" as the most significant barrier.

Figure 4: Most and Least Significant Barriers Matrices

Most Significant Barrier					
1 st		2 nd		3 rd	
E	41%	E	16%	E	13%
B	11%	J	11%	N	10%
A	9%	N	11%	G	10%

Least Significant Barrier					
1 st		2 nd		3 rd	
D	20%	D	18%	O	14%
C	17%	N	10%	N	13%
A	12%	L	10%	K	11%

On the opposite end of the spectrum, 20% of respondents selected barrier D “masculine corporate culture” as the least significant barrier to women advancing in their organization. This was followed by barrier C “few role models for women” at 17% and A “roles assigned by society to men and women” at 12%. Barrier D was also the most common 2nd least significant barrier, picked by 18% of respondents. This was followed by N “management generally viewed as a man’s job” and L “stereotypes against women” both at 10%.

It is interesting to note that overlap exists between the most significant barriers and the least significant barriers. Though this may seem counterintuitive, there are two important factors to consider. First, the same respondent who chose a given barrier as one of the most significant barriers probably did not also pick the same barrier as one of the least significant. Second, respondents chose from a list of 15 barriers. In theory, if respondents felt neutral about all barriers, then each barrier would be picked approximately the same number of times and receive a score of 6.7%. Due to the small sample size, marginal differences from this average can result from random variation. Consequently, 9% of the sample picking barrier A as the most significant barrier is not a strong indication of significance.

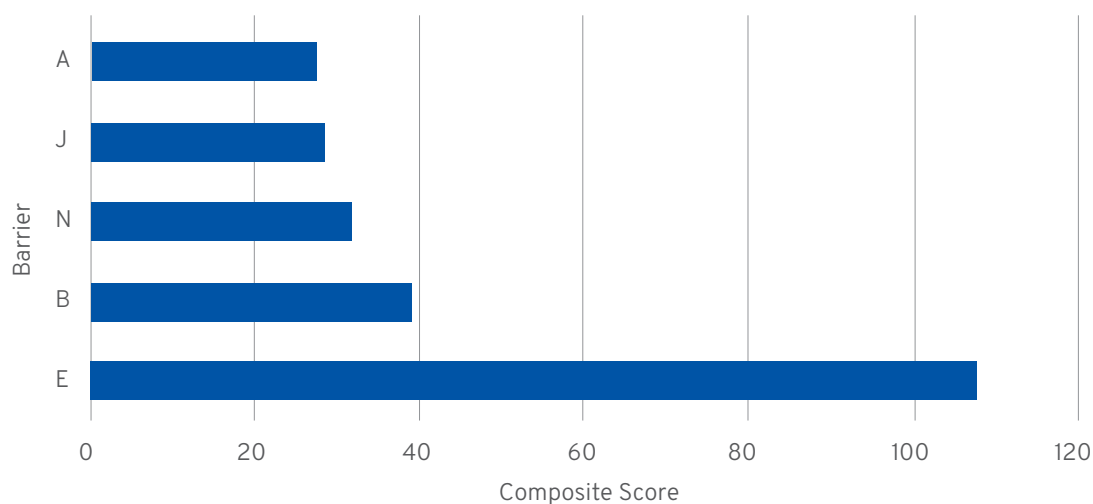
Most significant barriers composite score

In order to simplify this analysis, a weighted composite score was calculated for each barrier based on the number of times it was picked as either the first, second or third most significant barrier.¹⁸ The bar chart below shows the barriers with the five highest composite scores. As one might expect from the earlier rankings, barrier E “women have more family responsibilities than men” was found to be the most significant barrier with a composite score of 108. This was nearly triple the next highest composite score of 39 for barrier B “women with insufficient general or line-management experience.” Barrier N “management generally viewed as a man’s job” came in third with a composite score of 32. Barriers J and A came in 5th and 4th place with composite scores of 28 and 27 respectively. The average composite score was 25.8, which can be thought of as a neutral score. As with the rankings earlier, any score near the average does not provide strong evidence about the perceptions of respondents and may only deviate from the average due to chance variation. As such, the three barriers E, B and N stand out among the rest. Survey respondents perceive these as significant barriers to the advancement of women in business and management. Barriers E and B also tied as the most significant barrier in the ILO’s global company survey results for Asia and the Pacific.¹⁹

¹⁸ The composite score is weighted. Each time a barrier was ranked as the most significant, it was given one point. Each time it was ranked as the second most significant barrier it was given 0.666 points. Each time it was ranked as the third most significant barrier it was given 0.333 points. These were added together to form a composite score for each barrier.

¹⁹ ILO, *Women in Business and Management: Gaining Momentum, Global Report* (Geneva: ILO Bureau for Employers’ Activities (ACT/EMP), 2015). A composite score was not calculated in the ILO Company Survey. Rather, barriers were all given equal weight regardless of being ranked first, second or third. Although the methodology differs from the composite score in this survey, the results similar.

Chart 17: Most Significant Barrier Composite Score



The double burden

It is both an expected and relevant finding that “women have more family responsibilities than men” was the most significant barrier to women’s advancement according to the survey. Myanmar remains a highly traditional, conservative society. Due to both deeply entrenched gender norms as well as biological factors (i.e. the ability to bare children), women are viewed primarily as caregivers within the family and relegated to the management of the household. Paid employment in the formal sector is often of secondary importance, and many women exit the labour force for family related responsibilities.

This trend occurs throughout the world but is all the more acute in traditional societies such as Myanmar. According to data from the 2014 Myanmar Census, females are most likely to be economically active between the ages of 20-24, after which point the female labour force participation rate steadily declines. This trend may be linked to marriage and motherhood. The average age for females to marry in Myanmar is 23.²⁰ Furthermore, 63.9% female non-labour force participants aged 15 and above, cited housework and family responsibilities as their reason for not being in the labour force, compared to 13.9% for male non-labour force participants.²¹

²⁰ Government of Myanmar - Department of Population, *The 2014 Myanmar Population and Housing Census: Thematic Report on the Labour Force* (Nay Pyi Taw, June 2017), pp.12-13.

²¹ MOLES, CSO, and ILO, *Myanmar Labour Force, Child Labour and School-To-Work Transition Survey*, 2015, pp.12-13.

Barriers across groups of interest

It is important to determine if the perceived barriers to women in business and management vary significantly across different groups of interest within the sample. To do so an adjusted average composite score (AACCS)²² was calculated. Below is a list of statistically significant differences between groups' AACCSs.

- The AACCS for barrier N was 43.1 for medium sized firms compared to 16.2 for small firms and 20.3 for large firms.* This suggests that traditional views of management as a man's job might be a more significant barrier for women working in mid-sized firms in the sample.
- Garment manufacturers have an AACCS of 49.2 for barrier D and 15.9 for barrier E compared to other firms at 15.9 and 4.5 respectively.* This suggests that a strong masculine corporate culture and women's family responsibilities are more significant barriers within garment manufacturing firms than in others. This supports earlier findings that HR policies addressing a work-life balance are not as commonly implemented amongst garment manufacturers as in other firms.

Surprisingly, no statistically significant differences were found in the AACCS scores for female and male respondents on any barrier. This is not to say that differences do not exist. It is quite likely that men and women have different perceptions about the most significant barriers facing women in business and management. However, with a small sample of 53 male respondents it is not possible to determine whether the observed differences in the sample data between male and female respondents is due to actual differences in perception or chance variation.

²² Respondents chose three barriers out of a list of fifteen. This, by nature, yields average composite scores that are small fractions. For easier analysis an adjusted average composite score is used, which is simply the average composite of a given barrier multiplied by 100.

8. Support Measures

Most likely support measures

Respondents were asked to define which support measures they would consider implementing in order to advance women within their respective businesses. Respondents were shown a list of 18 measures and asked to rank the top three they would consider implementing. This list is given below along with a corresponding code letter for each support measure. The three most popular measures for each rank are given in the matrix below.

Table 9: Most Likely Support Measures and Coding

Code	Support Measure
A	Specific training for women
B	Mentoring scheme
C	Assigning women managers visible and challenging tasks
D	Exposing women to all company operations and functions
E	Making corporate culture to be more inclusive
F	Top level management support for a gender equality strategy
G	Awareness training for senior managers on the business case for more women in management
H	Flexible working arrangements
I	Provide childcare facilities/support
J	Improved maternity leave
K	Recognition and support for women
L	Retention and re-entry schemes
M	Setting of targets and tracking progress
N	Appointing a woman as CEO
O	Appointment of women to board of directors
P	Focus groups for senior and mid-level women
Q	Appointment of male gender champions in senior management and at board level
R	Making promotion paths and career advancement prospects clear for women

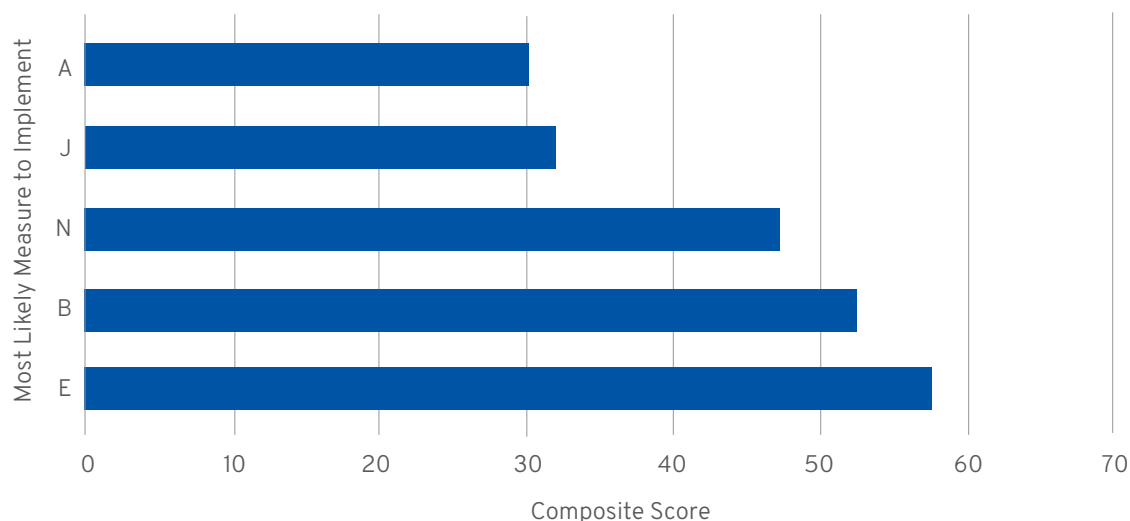
Figure 5: Most Likely Support Measure Matrix

Most likely measure to implement					
1 st		2 nd		3 rd	
C	19%	E	14%	M	13%
E	14%	D	14%	R	12%
D	13%	C	12%	K	11%

Nineteen percent of respondents chose C “assigning women managers visible and challenging tasks” as the measure they would be most likely to implement. This was followed by E “making corporate culture to be more inclusive” at 14% and D “Exposing women to all company operations and functions” at 13%. The same three measures (C, E and D) were also chosen as the top three second most likely measures businesses would implement. M “setting of targets and tracking progress”, R “making promotion paths and career advancement prospects clear for women” and K “recognition and support for women” were identified by respondents as the third most likely measure their enterprise would be willing to implement. They were selected by 13%, 12% and 11% of respondents respectively.

Composite scores for each of the measures were calculated using the same weighting as for the barriers in the previous section. The bar chart below shows the measures with the five highest composite scores. As one would expect, the highest ranked support measures in the ranking matrix also have the highest composite scores. Measure C had the highest composite score at 57.6. This was closely followed by E (52.6) and D (47.3). Measure A and measure B rounded out the top five with much lower scores of 32 and 30.3. The average composite score for all support measures is 22.2. Given the fact that all top five support measures had scores well above this average, they can all be considered relevant.

Chart 18: Most Likely Measures Composite Score



These findings are closely in keeping with the ILO’s Business Survey results for Asia and the Pacific. The five support measures with the highest composite scores listed in the chart above are also within the top five support measures across Asia and the Pacific.²³

²³ The ILO survey results for Asia and the Pacific had three measures tie for fourth place and two measures tie for second place. Hence, there were actually 8 measures within the top 5. ILO, Women in Business and Management: Gaining Momentum, Global Report (Geneva: ILO Bureau for Employers’ Activities (ACT/EMP), 2015)

As with the most significant barriers, an average adjusted composite score (AACS) was calculated for each support measure and compared across groups of interest. Although differences between groups exist, none were statistically significant. Consequently, it is not possible to determine if the differences signify an actual difference between these groups or are simply brought about by chance variation in the data. Had the sample size been larger or had there been a smaller number of support measures to choose from, this might not have been the case.

Most beneficial support measures

Survey respondents were asked what support from representative business organizations would be most beneficial in helping them to attract and retain skilled women and to promote more women as managers. They were shown a list of eight support measures and asked to rank the three most beneficial to their enterprise. The coding for these measures is given below as well as a ranking matrix.

Table 10: Most Beneficial Support Measures Coding

Code	Support Measure
A	Identifying the business case for women in management
B	Networking with other companies on good practices
C	Networking with women’s business associations
D	Designing an equal opportunity policy
E	Developing a strategy to promote more women in management
F	Introducing a mentoring scheme
G	Designing a sexual harassment policy
H	Guides on measures and strategies to promote women in management

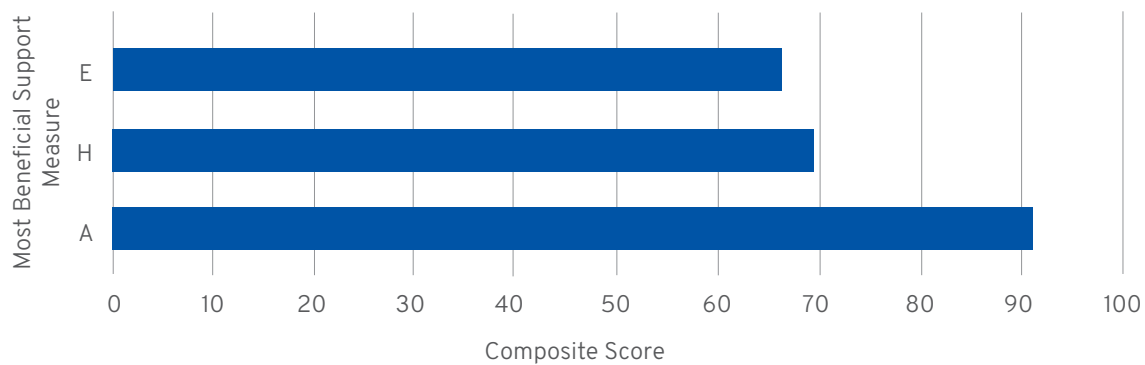
Figure 6: Most Beneficial Support Matrix

Most Beneficial Support					
	1 st	2 nd		3 rd	
A	33%	E	24%	H	22%
H	19%	H	14%	F	17%
D & E	14%	D & F	13%	B	15%

Thirty-three percent of respondents cited measure A “Identifying the business case for women in management” as the most beneficial support they could receive from representative business organizations. This was followed by measure H “guides on measures and strategies to promote women in management” at 19% while measure D “Designing an equal opportunity policy” and E “developing a strategy to promote more women in management” tied for third at 14%.

A composite score was also calculated for each support measure. Measure A had the highest composite score at 90.9 and was followed by H and E with scores of 69.6 and 66.6 respectively. The composite scores for all other support measures was equal to or below the average composite score of 50. Consequently, they were not included in this bar chart as they are effectively a neutral or negative score and show no inclination towards these support measures by respondents.

Chart 19: Most Beneficial Support Composite Score



These findings are in keeping with the ILO business survey results for Asia and the Pacific. Measure A was the top ranked measure for this survey as well, and measures H and E were both in the top five.²⁴

Comparing AACS across groups of interest yielded two statistically significant results.

- Garment manufacturers had a AACS of 33.3 for measure B “networking with other companies on good practices” compared to other firms with an AACS of 17.5.*
- Manufacturers had an AACS of 62.5 for measure A, while services and other sectors had AACSs of 40.4 and 37.5.*

²⁴ ILO, Women in Business and Management: Gaining Momentum, Global Report (Geneva: ILO Bureau for Employers’ Activities (ACT/EMP), 2015).

9. Conclusion

Analysis of the survey data generated a wealth of insights on the issues facing women in business and management in Myanmar. These can be used to inform programming for businesses, representative organizations and the ILO. Overall, three main trends emerge from the data.

First, garment manufacturers stand out among other businesses as large employers of women both in relative and absolute terms. The garment industry has grown rapidly in recent years and is expected to continue growing as Myanmar becomes more export oriented. Consequently, this is perhaps the largest and most significant industry in terms of formal sector, industrial employment for women.

Second, the most common HR policies and practices implemented by firms in the sample do not address the most significant barriers to women in business and management. “Women have more family responsibilities than men” was ranked as the most significant barrier with a composite score nearly three times as large as the next highest ranked barrier. However, only a small proportion of sampled businesses implement HR policies and practices that could help women to better balance the responsibilities of work and family life. These include, child/elder care, career breaks, flexible working hours and maternity and paternity leave past the legal requirement. Furthermore, these policies and practices are significantly less common amongst garment manufacturers than in other firms. This denotes a business model that is not conducive to the advancement of women, despite the fact that that industry is a large employer of women.

Third, there is a disconnect between the barriers to women in business and management and the support measures that firms would likely implement. Respondents indicated that they would be most likely to implement measures such as “making corporate culture more inclusive towards women” and “assigning women managers visible and challenging tasks”. They also indicated that the most beneficial support they could receive is guidance on measures to promote women in management and evidence on the business case for women in management.

While these are well-intentioned measures that will, no doubt, help to advance women in the workplace, they do not address the most significant barrier that women face. Similarly, many commonly HR policies like “setting specific targets for gender equity” address the visible signs of gender inequity but not the root cause of the issue. What is needed, is for businesses to create a work environment, which recognizes the family responsibilities of women and supports them to adequately balance these with work obligations. This will open the door for more women to become productive, fully-engaged employees and managers who can advance through the ranks of their company due to their own skills and merit, rather than by gender quotas. Doing so can expand the talent pool within companies and ultimately lead to increased competitiveness and improved business outcomes.

UMFCCI survey on Women in Business in Myanmar

Investigators			
Chief Investigator:			

To complete before survey:	
Surveyor Name:	Date of survey:
Business Name:	Business Phone Number:
City:	State/Region:

Good morning. Thank you for taking the time to meet with us today. Before we start , I'd like to read you a brief information statement about the survey:

You are invited to participate in a UMFCCI survey to examine how a diverse and inclusive talent pool can affect business outcomes. The survey findings will be used in an upcoming report by UMFCCI. The report will contribute to national policy debates, recruitment and promotion strategies and training approaches. We will ensure the information that you provide will be kept completely confidential. The survey will only take a short amount of your time. Thank you for your participation!

1	What is the country of origin of this business?		
	Foreign-owned business	Joint venture company	
	Myanmar-owned business	Other (describe)	
	Branch office of foreign company		

2	What is the primary economic activities of this business? (describe, then use translated ISIC codes)		
	Economic Activity	ISIC classification	
		(CONFIRM USING LIST)	

3	What is the gender of the survey respondent?		
	Male	Female	No Response

4	Which of the following characteristics about women's leadership apply to this business? (check all that apply)		
	Women own more than 50% of the business		
	The management and daily business operations are controlled by one or more women		

5	How many of each of the following types of employees are currently employed by your business? If you do not know the exact values, then please give us your best estimation.		
		Male	Female
	Full-time workers		
	Part-time, daily, seasonal or other types of working arrangements		
	(Full-time equivalent non-standard employees)		

6	How many of each of the following types of MANAGERS are currently employed by your business?		
		Male	Female
	Supervisory/junior/administrative management		
	Middle management		
	Senior management		
	Top executive		

7	Does your company have a female as the top manager (CEO)?		
	Yes	No	Do not know

8	Has there ever been a women as the top manager (CEO) of this business?		
	Yes	No	Do not know

9	Does your company have a board of directors?		
	Yes	No	Do not know

10	How many of the members of the board of directors are women?		
	women out of a total number of _____	members of the board of directors.	

11	Does your company have an equal employment opportunity policy or a diversity and inclusion policy?		
	Yes	No	No response

12	In which of the following areas does your company have a human resource management system and implement initiatives to promote equality? (Check all that apply)			
		Yes	No	NA
	Recruitment, retention and promotion			
	Mentoring			
	Skills training/executive training			
	Flexible working hours			
	Part-time working hours			
	Remote work or telework			
	Maternity leave (beyond requirements in the law)			
	Paternity leave (beyond requirements in the law)			
	Career breaks			
	Re-entry programmes			
	Child care/elder care			
	Prevention of sexual harassment			

		Yes	No	NA
	Remuneration			
	Specific strategy that includes targets for gender diversity/inclusion at entry or mid-level			
	Specific strategy that includes targets for gender diversity/inclusion at senior-management level			

13	Have the company policies you mentioned in the previous question helped improve your business outcomes?		
	Yes	No	Do not know

14	If yes, how have your business outcomes improved? (check all that apply)		
	Improved business performance, including profitability and productivity		
	Increased ability to attract and retain talent		
	Enhanced company reputation		
	Greater creativity, innovation and openness		
	Better ability to gauge consumer interest and demand		
	Other (please specify) _____		

15	In your view, which of the following barriers are the MOST significant in preventing women from advancing within your company? (Please rank the top three by writing 1, 2, & 3 in the column to the right of the barrier)		
	Roles assigned by society to men and women		
	Women with insufficient general or line management experience		
	Few role models for women		
	Masculine corporate culture		
	Women have more family responsibilities than men		
	Lack of company equality policy and programmes		
	Gender equality policies in place but not implemented		
	Men not encouraged to take leave for family responsibilities		
	Inherent gender bias in recruitment and promotion		
	No strategy for retention of skilled women		
	Lack of leadership training for women		
	Stereotypes against women		
	Inadequate labour and non-discrimination laws		
	Management generally viewed as a man's job		
	Lack of flexible work solutions		

16	In your view, which of the following barriers are the LEAST significant in preventing women from advancing within your company? (Please rank the bottom three by writing 1, 2, & 3 in the column to the right of the barrier)		
	Roles assigned by society to men and women		
	Women with insufficient general or line management experience		
	Few role models for women		
	Masculine corporate culture		
	Women have more family responsibilities than men		
	Lack of company equality policy and programmes		
	Gender equality policies in place but not implemented		

	Men not encouraged to take leave for family responsibilities	
	Inherent gender bias in recruitment and promotion	
	No strategy for retention of skilled women	
	Lack of leadership training for women	
	Stereotypes against women	
	Inadequate labour and non-discrimination laws	
	Management generally viewed as a man's job	
	Lack of flexible work solutions	


17	In your view, which of the following measures would your business be most likely to consider implementing in order to advance women within your business? (Please rank the top three by writing 1, 2, & 3 in the column to the right of the barrier)	
	Specific training for women	
	Mentoring scheme	
	Assigning women managers visible and challenging tasks	
	Exposing women to all company operations and functions	
	Making corporate culture to be more inclusive	
	Top level management support for a gender equality strategy	
	Awareness training for senior managers on the business case for more women in management	
	Flexible working arrangements	
	Provide childcare facilities/support	
	Improved maternity leave	
	Recognition and support for women	
	Retention and re-entry schemes	
	Setting of targets and tracking progress	
	Appointing a woman as CEO	
	Appointment of women to board of directors	
	Focus groups for senior and mid-level women	
	Appointment of male gender champions in senior management and at board level	
	Making promotion paths and career advancement prospects clear for women	

18	In what ways could your company most benefit from the support of representative business organizations to attract and retain skilled women and to promote more women as managers?	
	Identifying the business case for women in management	
	Networking with other companies on good practices	
	Networking with women's business associations	
	Designing an equal opportunity policy	
	Developing a strategy to promote more women in management	
	Introducing a mentoring scheme	
	Designing a sexual harassment policy	
	Guides on measures and strategies to promote women in management	

Appendix B

Number of Sampled firms per township

City	Township	Sampled Firms	% of Sample
Yangon	North Dagon	2	1.0%
Yangon	South Dagon	2	1.0%
Yangon	Dagon	2	1.0%
Yangon	Yankin	2	1.0%
Yangon	Insein	3	1.5%
Yangon	Dagon Seikkan	3	1.5%
Yangon	Thingangyun	3	1.5%
Yangon	Kyimyindaing	3	1.5%
Yangon	Pabedan	3	1.5%
Yangon	Thaketa	3	1.5%
Yangon	South Okkalapa	4	2.0%
Yangon	Pazudaung	4	2.0%
Yangon	Mingalar Taungnyunt	4	2.0%
Yangon	Mingaladon	5	2.5%
Yangon	North Okkalapa	5	2.5%
Yangon	Latha	5	2.5%
Yangon	Tamwe	5	2.5%
Yangon	Shwepyitha	6	3.0%
Yangon	Lanmadaw	6	3.0%
Yangon	Botataung	7	3.5%
Yangon	Sanchaung	7	3.5%
Yangon	Mayangon	8	4.0%
Yangon	Kamayut	8	4.0%
Yangon	Bahan	8	4.0%
Yangon	Kyauktada	8	4.0%
Yangon	Hlaingtahaya	10	5.0%
Yangon	Hlaing	10	5.0%
Mandalay	Pyigyidagun	3	1.5%
Mandalay	Chanmyathazi	5	2.5%
Mandalay	Aungmyethazan	11	5.5%
Mandalay	Maha Aungmye	16	8.0%
Mandalay	Chanayethazan (city centre)	29	14.5%



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ISBN : 9789220323892