

Can ASEAN move forward if women are left behind?

Women in ASEAN:
unlocking possibilities



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Building a better
working world

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Foreword

As the Association of Southeast Asian Nations (ASEAN) marks its 50th anniversary, member nations celebrate the economic and social progress the community has made since 1967. During this time, women in ASEAN have made wide-ranging improvements in health, educational attainment, economic participation and, increasingly, government and business leadership.

Despite incredible diversity in cultures and development levels across countries, much has been achieved through public legislation and efforts by the private sector and civil society. Advancements in the socio-economic standing of women and youth have transformed societies and communities across ASEAN and strengthened their resilience.

As the region's economies develop, the need to ensure that hard-won gains are not lost is more critical than ever. With technology and globalization driving disruption, many jobs that are disproportionately held by women are increasingly under threat by automation and displacement. At the same time, women remain underrepresented in high-growth fields such as management, computer science, mathematics, architecture and engineering.¹

Business leaders need to translate their support for gender diversity into direct, actionable game plans and be bold in harnessing the power of diversity of ideas to foster environments where women can flourish.

¹ "Technology Could Destroy More Jobs for Women Than Men," *Fortune*, 28 January 2017, ©2017 Time Inc.

In this report, we examine the strategies that the private sectors have adopted to support and empower women in the workforce and explore how the educational system can groom girls and women to reach their full potential. Governments and corporations in ASEAN can further enable the economic, political and corporate advancement of women through policies that deliver better benefits and incentives for working women and provide training for those entering the workforce.

We hope this publication will unlock strategies that ASEAN nations can take as we celebrate the progress of women at ASEAN 100.



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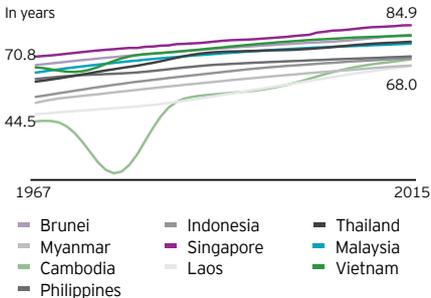
Celebrating 50 years of progress

Since 1967 when ASEAN was formed, women have made great strides in their contribution to the growth and prosperity of the ASEAN nations. Development can be seen across many indicators; life expectancies continue to rise and more girls are enrolling in schools in ASEAN. More women are economically active and assuming leadership positions in the boardroom and government.

Government initiatives and policies have also resulted in greater legal and property rights for women as well as improved access to employment opportunities.

Looking back on the last 50 years

Women's life expectancies have risen

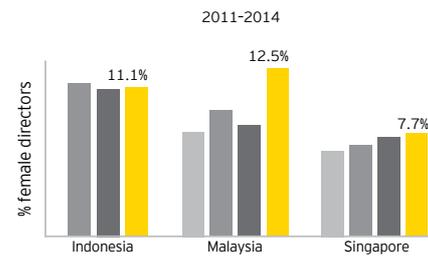


Rising proportion of women in the 60-64 age bracket

ASEAN average:

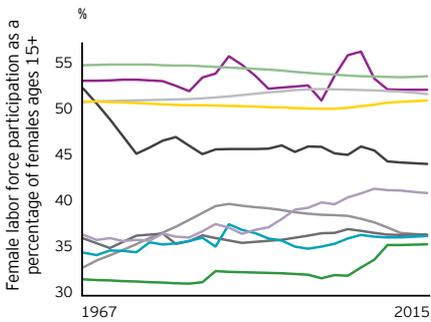
2.2% 1967 3.7% 2015

Women's representation on boards



Note: 2011 data for Indonesia not available

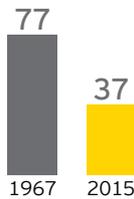
Trend around labor force participation is mixed



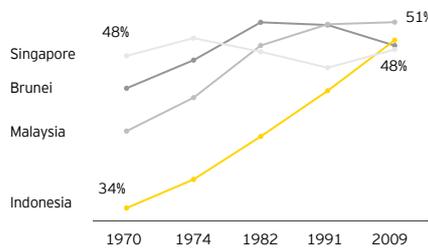
Note: Each trend represents a country in ASEAN

Declining adolescent fertility

ASEAN average, per 1,000 women aged 15-19:



Female secondary school enrollment rates have risen



Note: year notations are not spaced evenly due to data gaps

Female representation in parliamentary chambers has risen

	Seats held by women	
	1967	2017
Brunei	0%	9%
Cambodia		15%-20%
Indonesia	0%	20%
Laos		28%
Malaysia	2%-3%	10%-22%
Myanmar	0%	10%
Philippines	5%-13%	25%-30%
Singapore	5%	24%
Thailand		5%
Vietnam		27%

Note: percentage ranges apply to countries with more than one parliamentary chamber

Sources:

Oxford Economics, accessed 8 November 2017

The Diversity Scorecard 2016: Building Diversity in Asia Pacific Boardrooms, 18 April 2016, ©2017 Korn Ferry

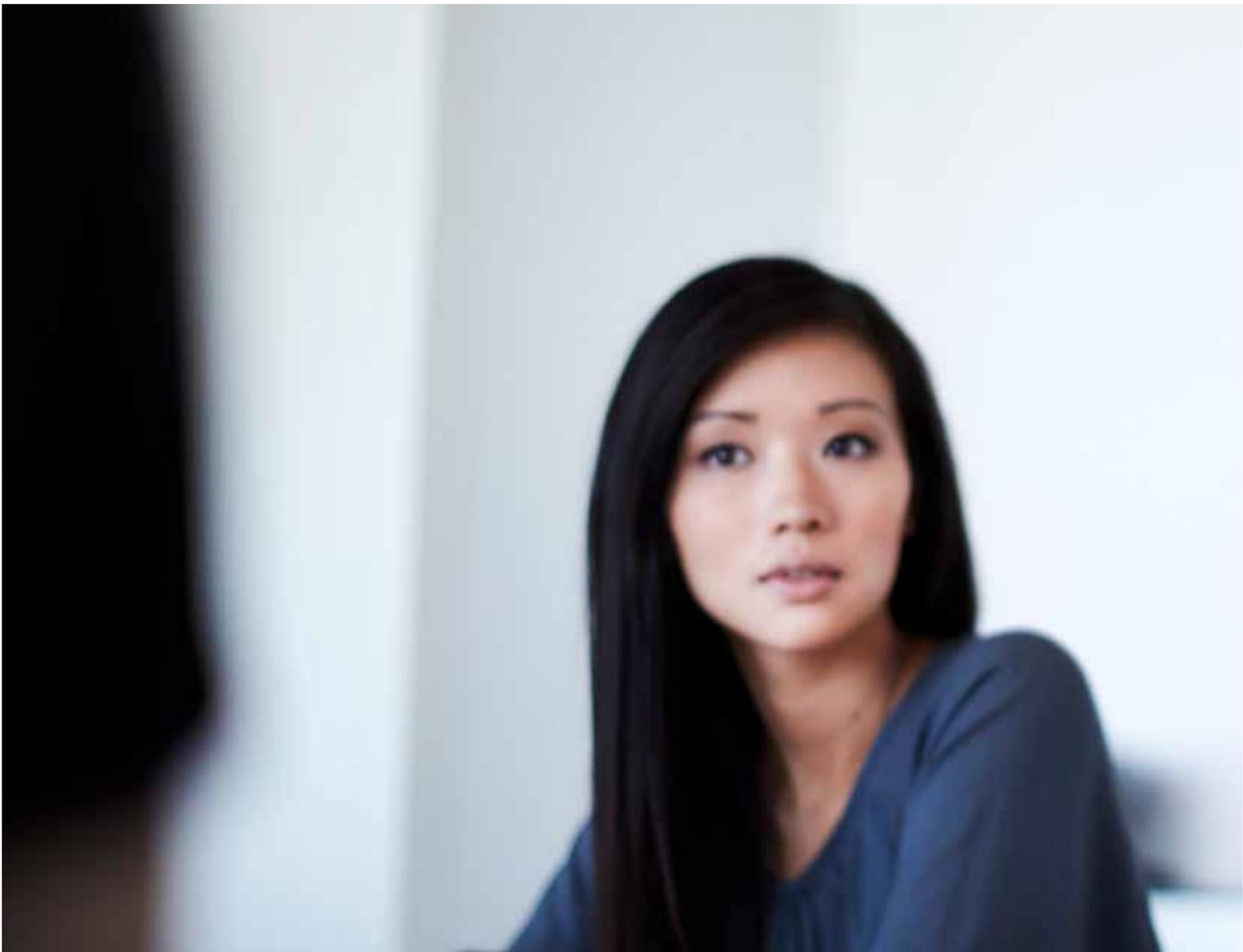
Lifestyles and health

Women's average life expectancy has risen on the back of medical advances, better access to health resources and lifestyle improvements. Between 1967 and 2015, countries that have experienced the most dramatic rise in longevity are Cambodia (+59%), Laos (+45%), Indonesia (+32%) and Myanmar (+32%).

Better health outcomes have led to a shift in population bulge, with the proportion of older women rising across the region over the past 50 years. In Cambodia, women aged between 60 and 64 accounted for only 1.9% of the

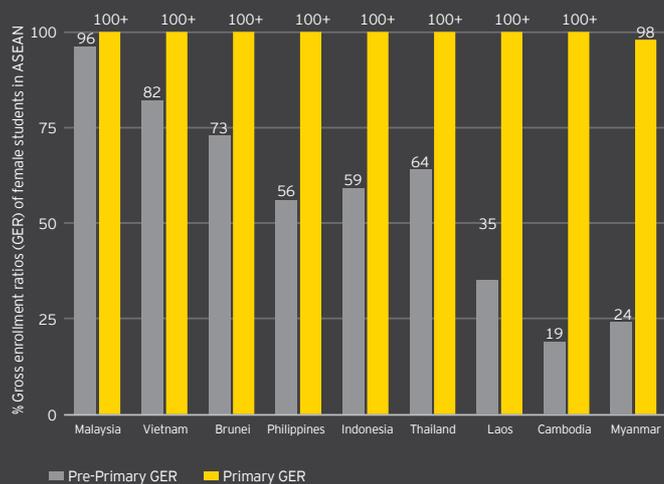
overall population in 1967; by 2015, this figure had risen to 3.1%. In comparison, Singapore and Thailand now have the largest proportion of women in that age range at 6.1% and 5.4% respectively.

Improvements in health outcomes are fundamental to women's well-being and also correlate with those of their children. Adolescent birth rate has declined significantly in most countries as a result of better access to education, widespread information on birth control and greater availability of contraceptives, among other factors.



Education

Traditional gender gaps around school enrollment have narrowed significantly since the 1960s as more girls enroll in secondary education. In Malaysia, the proportion of female secondary school students rose from 41% in 1970 to 51% in 2009. Progress has been even more dramatic in Indonesia, where only 34% of secondary school students in 1970 were female, rising to 49% by 2009.



Source: UNESCO Institute for Statistics (UIS)



Economic participation

Women's labor force participation has risen in the past three decades, particularly in rapidly growing economies such as the Philippines and Singapore. In other markets such as Thailand and Laos, female workforce participation as a percentage of the working-age female population has remained largely unchanged or fallen since 1990. The general upward trend across ASEAN mirrors other countries in Asia-Pacific (with the exception of China and Japan). Yet, even before 1990, women in the region have long played a major economic role as business owners and entrepreneurs across many sectors, especially at the micro and small enterprise level.²

² *Projected Gender Impact of the ASEAN Economic Community*, ASEAN Secretariat, March 2016, ©2016 Association of Southeast Asian Nations (ASEAN).

³ *Korn Ferry Diversity Scorecard 2016: Building Diversity in Asia Pacific Boardrooms*, 19 April 2016, ©2016 Centre for Governance, Institutions & Organisations (CGIO) and Korn Ferry.

Business and political leadership

In recent years, there has been an increase in gender diversity for the C-suites and corporate boards, with the proportion of female directors growing but varying greatly across economies. Malaysia leads ASEAN's developed markets, with women comprising 12.5% of board members in 2016, followed by Indonesia at 11.1% and Singapore at 7.7%.³ Both Malaysia and Singapore have experienced increase of several percentage points since 2011-12, with board diversity in Indonesia relatively unchanged.

Women's representation in parliamentary chambers across ASEAN has also risen considerably since 1967. In at least three countries, namely Brunei, Indonesia and Myanmar, representation increased from almost zero 50 years ago to a sizeable percentage today. In Malaysia, the proportion of elected seats held by women in the Senate (Dewan Negara) and House of Representatives (Dewan Rakyat) has increased with successive parliaments. 50 years ago, only 2.5% in the Senate and 2.1% of seats in the House of Representatives were taken by women. As of 2017, they make up 22.1% and 10.4% of the country's two primary governing bodies.





Technology and disruption are raising the stakes

The Fourth Industrial Revolution is fundamentally transforming industries, disrupting jobs and creating new business models and economic opportunities across ASEAN. Disruptive technologies have led to rising automation across sectors and job roles, especially those where women have considerable presence.

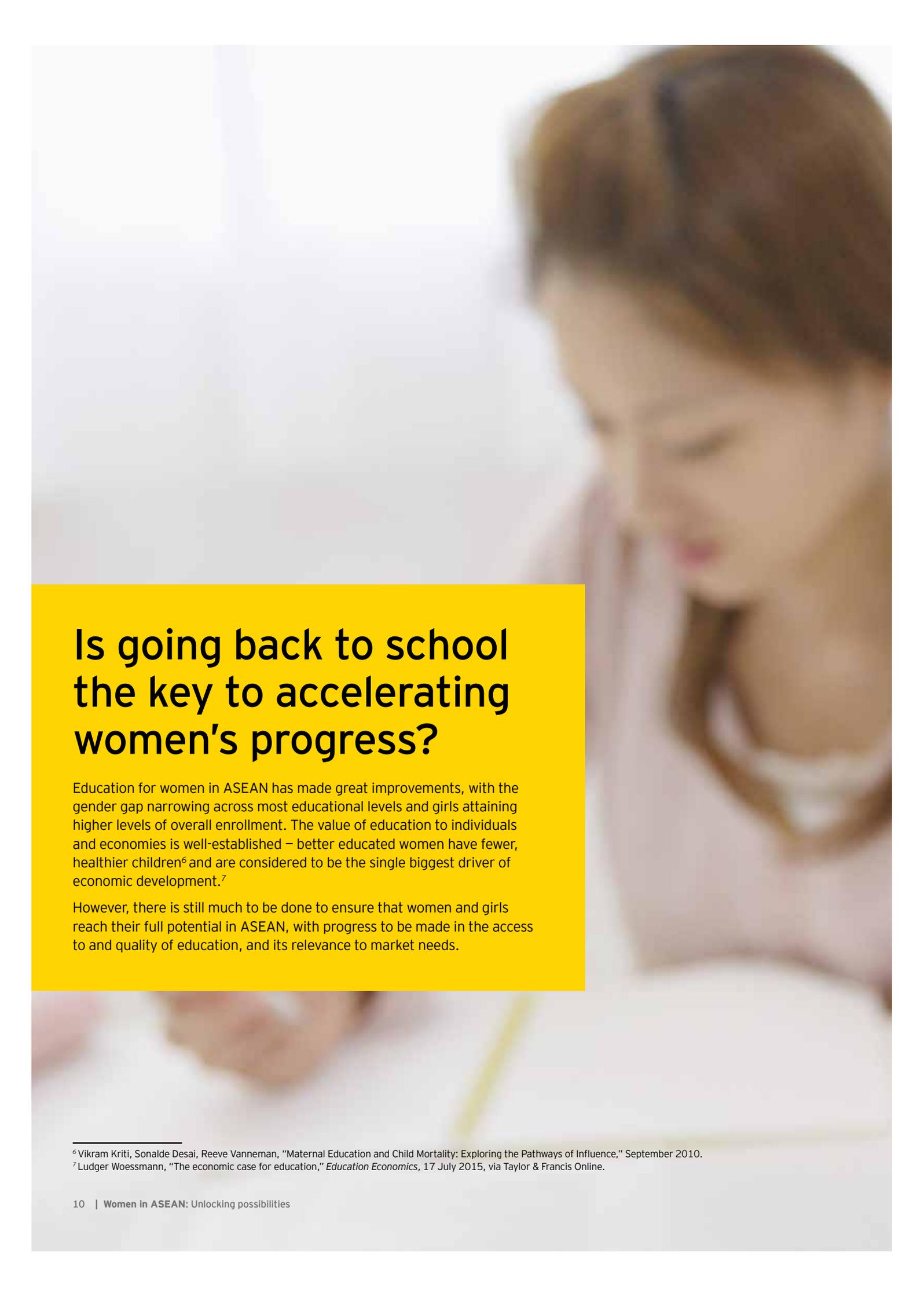
Automation is gradually impacting and eliminating roles in sectors where there is a high rate of employment of women, such as agriculture (especially in Cambodia, Laos and Myanmar), garments and textiles (Cambodia, Laos, Myanmar and Vietnam), health care manufacturing or services (Brunei and Singapore) as well as in retail, food and beverage manufacturing and services.⁴

In the Philippines and Vietnam, women are twice as likely to occupy jobs at high risk of automation as their male counterparts. In Indonesia and Thailand, they are 1.5 times more likely.⁵

Technologies such as robotic process automation (RPA), robots and artificial intelligence (AI) will also impact the financial sector, where women hold a higher share of employment as technicians or in roles providing clerical, sales or administrative support.

⁴ *Projected Gender Impact of the ASEAN Economic Community*, ASEAN Secretariat, March 2016, ©2016 Association of Southeast Asian Nations (ASEAN).

⁵ Jae-Hee Chang, Gary Rynhart, Phu Huynh, *ASEAN in transformation: How technology is changing jobs and enterprises*, July 2016, ©2016 International Labour Organization.



Is going back to school the key to accelerating women's progress?

Education for women in ASEAN has made great improvements, with the gender gap narrowing across most educational levels and girls attaining higher levels of overall enrollment. The value of education to individuals and economies is well-established – better educated women have fewer, healthier children⁶ and are considered to be the single biggest driver of economic development.⁷

However, there is still much to be done to ensure that women and girls reach their full potential in ASEAN, with progress to be made in the access to and quality of education, and its relevance to market needs.

⁶ Vikram Kriti, Sonalde Desai, Reeve Vanneman, "Maternal Education and Child Mortality: Exploring the Pathways of Influence," September 2010.

⁷ Ludger Woessmann, "The economic case for education," *Education Economics*, 17 July 2015, via Taylor & Francis Online.

Access to basic education for girls in ASEAN countries is high, with primary gross enrollment ratios (GERs) for girls ranging from approximately 95% to 100%. The region has almost achieved a key Millennium Development Goal set by the United Nations in 2000, with markets such as Laos and Cambodia achieving the target.

However, enrollment in pre-primary education varies, with enrollment ratios ranging from 19% in Cambodia to 96% in Malaysia. The value of pre-primary education is well-established, as greater access will help all children reach their full potential. Lower levels of girls' enrollment in less-developed ASEAN countries is often a function of overall poor education opportunities, as regional gender parity indices (pre-primary through tertiary) are typically high.

Regional and economic disparities disproportionately impact girls in some countries. In Indonesia, the school enrollment ratio of girls to boys is as high as 1:1 in some regions but falls to 0.7:1 in others.⁸ In parts of Myanmar, the proportion of girls not in school is 7% higher than that of boys.⁹

Even in the region's most developed economies, access to certain levels of education can be unequal. In Singapore, Vietnam, and Indonesia, girls have lower expectations of securing a career in Science, Technology, Engineering and Mathematics (STEM) from a young age.¹⁰ This is likely contributing to the fact that women across the region are underrepresented in sectors such as engineering. In Singapore, women comprise just 30% of the workforce in that sector.¹¹

Quality of education

Learning outcomes for girls and boys in ASEAN vary widely. Under the Program for International Student Assessment (PISA), a global standardized test of secondary school students administered by the Organisation for Economic Co-operation and Development (OECD), Singapore had the highest mean score in 2015 and Vietnam's #8 global ranking is higher than the UK.

On the other end of the spectrum, Indonesia ranked among the bottom 10 countries despite significant recent progress.¹²

PISA 2015 mean score ranking in select countries

Ranking	Country
1	Singapore
2	Japan
3	Estonia
4	Chinese Taipei
5	Finland
6	Macao
7	Canada
8	Vietnam
	:
54	Thailand
	:
62	Indonesia

Source: PISA 2015 Results in Focus, ©2016 OECD

Teaching quality also plays a role in educational outcomes. Students with a poor teacher master 50% or less of their curriculum during the school year, while students with an excellent teacher can advance up to 1.5 grade levels.^{13 14} A key risk factor is instructors who teach subjects they are not qualified for; one study of rural Thailand found that more than 90% of teachers do not teach subjects they have graduated in.¹⁵

Improving educational quality in lower-performing countries through initiatives such as better teacher training and increased access to learning resources will enable children of both genders to realize their full potential.

⁸ Soedarti Surbakti, Theresa Devasahayam, *Women and Girls in Indonesia: Progress and Challenges*, October 2015, ©2015, United Nations Population Fund.

⁹ *Interim Country Partnership Strategy*, October 2012, ©2012 Asian Development Bank.

¹⁰ PISA 2015 Results in Focus, ©2016 OECD.

¹¹ *A Complex Formula: Girls and Women in Science, Technology, Engineering and Mathematics in Asia*, ©2015 UNESCO.

¹² *Country Note - Results from PISA 2015*, ©2016 OECD.

¹³ "Generalizations about Using Value-Added Measures of Teacher Quality," *American Economic Review* Vol. 100, No. 2 (accessed via www.aeaweb.org, 8 November 2017).

¹⁴ *Educating the Next Generation, Improving Teacher Quality in Cambodia*, ©2015 International Bank for Reconstruction and Development and The World Bank.

¹⁵ *Kasetsart Journal of Social Sciences*, Volume 38, Issue 2, May-August 2017 (accessed via www.sciencedirect.com, 8 November 2017).

Ensuring relevance

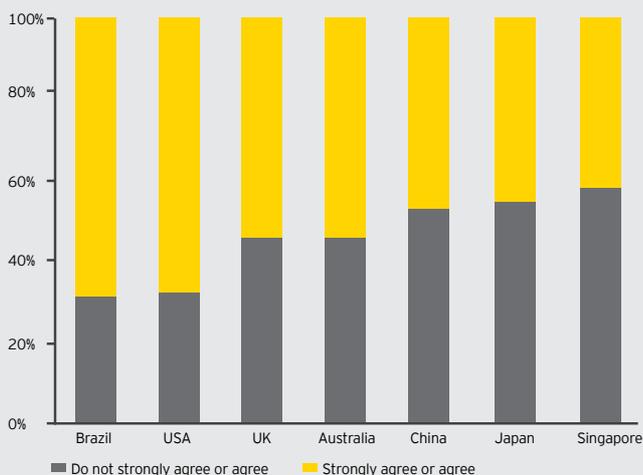
The World Economic Forum's Global Competitive Index ranks nearly half of ASEAN geographies in the bottom 35% of economies globally in terms of technological readiness.¹⁶

With 40% of global employers today reporting talent shortage,¹⁷ education systems need to prepare graduates with relevant skills. ASEAN's skills gap is largely marked by a shortage of technical knowledge.¹⁸ STEM education is particularly relevant given rapid technological shifts and the rise of industry automation,¹⁹ alongside the emphasis on infrastructure development in many emerging ASEAN economies.

A higher number of female graduates need to be prepared for STEM professions worldwide. In OECD countries, an average of 25% of engineering and mathematics graduates are women.²⁰ In ASEAN, women have a skewed tendency to study education, health welfare and humanities, with STEM uptake at only 17%.²¹

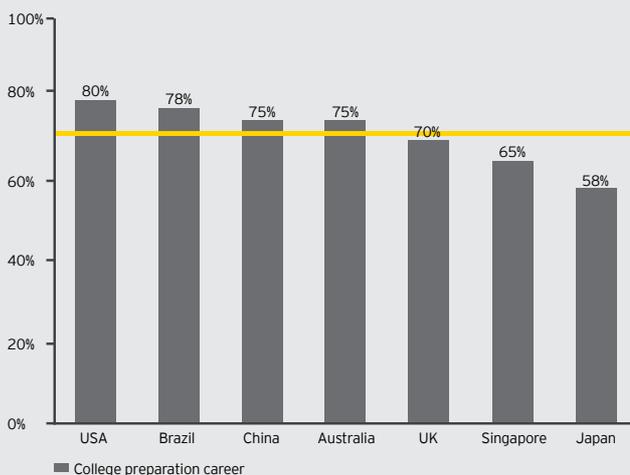
Students' perception of relevant skills provided in college (select countries, 2015)

Q: Do you believe that college has provided you with career-relevant skills?



Graduate's perceptions of education's preparation for their career (select countries, 2015)

Q: To what degree did education prepare you for work in your field?



Source: "Career Preparedness & Lifelong Learning. A Global Perspective," Canvas © 2017 Instructure.

¹⁶ Professor Klaus Schwab, *The Global Competitiveness Report 2016-2017*, ©2016 World Economic Forum.

¹⁷ "2016-2017 Talent Shortage Survey," ManpowerGroup, © 2017 ManpowerGroup.

¹⁸ Monika Aring, *ILO Asia-Pacific Working Paper Series. ASEAN Economic Community 2015: Enhancing competitiveness and employability through skill development*, February 2015, © International Labour Organization 2015.

¹⁹ Jae-Hee Chang, Gary Rynhart, Phu Huynh, *ASEAN in transformation: How technology is changing jobs and enterprises*, July 2016, ©2016 International Labour Organization.

²⁰ *A Complex Formula: Girls and Women in Science, Technology, Engineering and Mathematics in Asia*, ©2015 UNESCO.

²¹ Jae-Hee Chang, Gary Rynhart, Phu Huynh, *ASEAN in transformation: How technology is changing jobs and enterprises*, July 2016, ©2016 International Labour Organization.



Education as the way forward to ASEAN 100

Interventions globally shed light on how policymakers can leverage government initiatives and public and private sector efforts to better the outcomes.

Improving access, quality and relevance

To ensure that graduate skills are aligned with market needs, countries are emphasizing the importance of vocational and technical education. In the UK, a new qualifications pathway was introduced for technical education, the T-levels, in 2017. The new system increased the required hours of training, replaced the 13,000 existing qualifications with just 15, and committed US\$650m more in funding.²² A distinct qualifications framework for technical education improves the value and esteem of technical degrees, creating clearer career pathways for graduates. This is pertinent to economies facing skills shortages and an oversupply of nontechnical degrees.

Raising teacher qualification requirements is an effective way to improve education quality and government commitment to do so is imperative for low-performing countries. Finland, a global leader in education, requires all teachers to have a Master's degree and undergo mandatory in-service training.

Teacher training was the focus of China's education policy in 2010. As a part of the National Teacher Training Project, the Government invested nearly US\$660m in 2012 and 2013 to fund teacher training initiatives across the country, with a specific pedagogical focus for rural teachers.²³

Another example is Speed Schools, an accelerated learning initiative that compresses the first three years of formal education into 10 months. It currently operates in Ethiopia, Liberia and Lebanon, and is particularly relevant to countries in ASEAN that have large regional disparities in access and seek to re-enroll older cohorts of children.

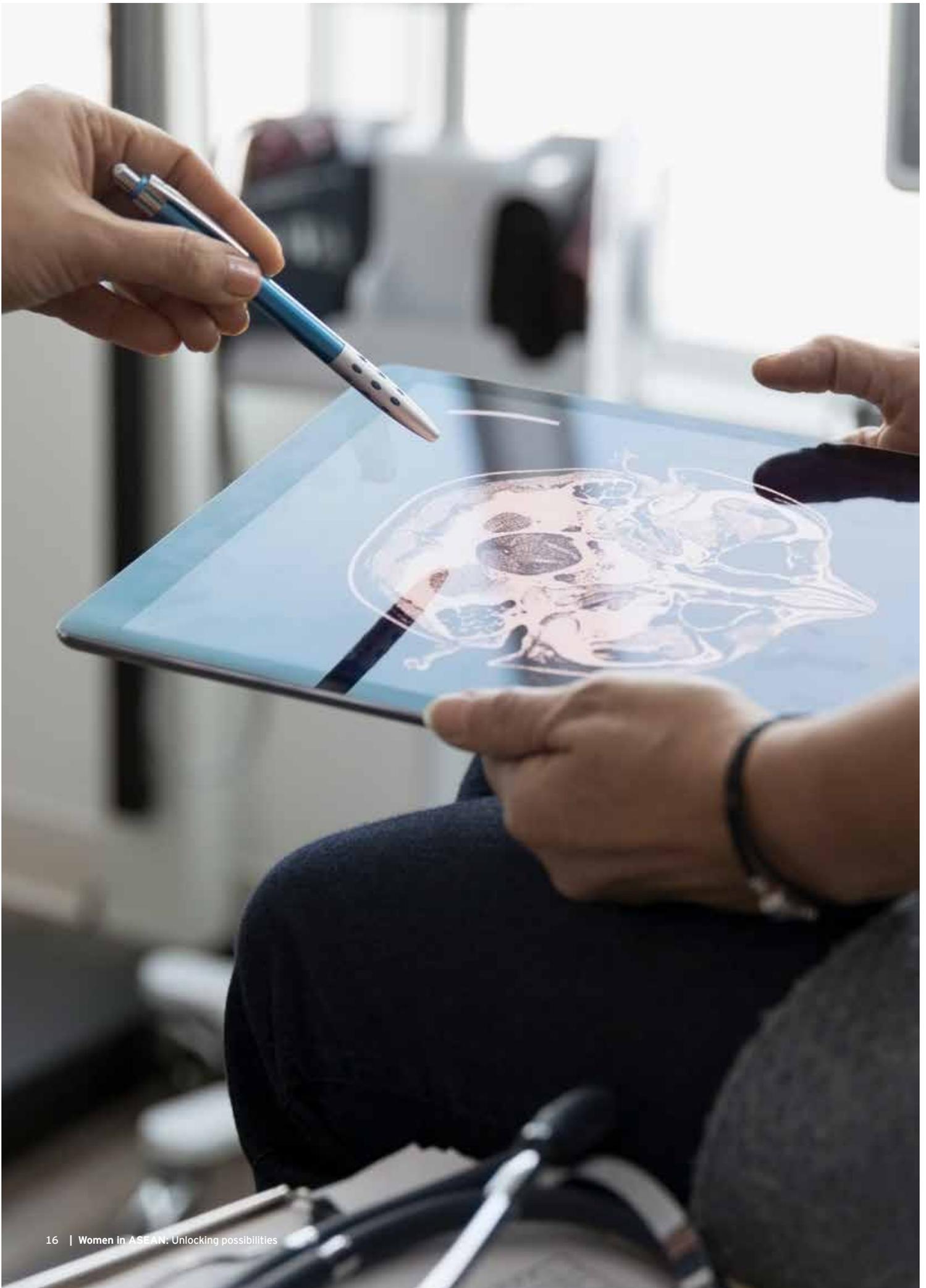
To address disparities in access to education, Kenya's Government launched the *Alternate Provision of Basic Education and Training Guidelines* in 2015. These include more flexible requirements for schools and encourage the emergence of regulated, formalized low-cost operators in underserved regions.

Governments can also support by partnering the private sector to supplement constrained public education systems. In 2016, Liberia launched the Partnership Schools for Liberia pilot, engaging eight private operators to manage 93 public schools.

²² 'T-levels' aim to improve technical education and improve UK productivity, *The Guardian*, 9 March 2017, ©2017 Guardian News and Media Limited.

²³ Hongyang Liu, Chengfang Liu, Fang Chang and Prashant Loyalka, *Describing the Landscape of Teacher Training in China*, March 2016.







Improving STEM participation

As digital becomes more embedded across industries, women in ASEAN need to be equipped with the STEM skills that job markets increasingly require. Policymakers are highlighting STEM skills gaps in their national rhetoric. The US has prioritized STEM education since 2009 through increased funding, via STEM campaigns for women such as Educate to Innovate and the establishment of the White House Science Fair. By bringing STEM education for women to the forefront of national dialogue, policymakers can encourage awareness, participation and cultural shifts. The short case studies that follow are examples of innovative initiatives targeting access and participation in STEM education.

Denmark's Coders Trust initiative is an online boot camp with courses that range between two and seven months. Graduates from the course can work as freelancers and connect with employers through career placement services. It offers student loans that cover tuition, which graduates repay through 10% of their freelance earnings. The initiative delivers quality computer science education to prepare graduates for high-paying freelance jobs.

GirlEng (GE) was started in South Africa in 2011 by WomEng, a nonprofit organization that aims to address the global shortage of women in engineering. GE partners schools and conducts free information sessions and hands-on weekend workshops to generate interest of high school girls in engineering professions.

École 42 is a private, nonprofit institution in France offering free training in information communications technology (ICT). With a highly flexible learning model, 42 does not have teachers, textbooks or a fixed curriculum; students learn through project work and peer-to-peer projects. Applicants are selected based on coding aptitude and not on prior academic qualifications, making ICT education accessible to any talented individual. With campuses in Paris and San Francisco, 42 currently enrolls more than 3,000 students.

ASEAN countries need to leverage the talent, energies and skills of women and men to reach their potential. Girls in the region are still held back from building the educational foundations needed to fully realize this potential. Policymakers and civil society taking measures to address these gaps should consider international innovation and best practices to secure the brightest education outlook for girls.



Role of government in propelling women forward

According to the study on the *Projected Gender Impact of the ASEAN Economic Community* published in 2016 by the ASEAN Secretariat, in order to reap the full benefits of trade expansion and economic integration, trade and non-trade policies and programs need to avoid bias toward a particular sex or social gender.²⁴

²⁴ ASEAN to enhance economic opportunities for women," *ASEAN Secretariat News*, 30 August 2017.



Throughout ASEAN, there is increasing recognition that to achieve sustained economic growth, gender parity and investing in women are key. Doing so can contribute significantly toward building greater capacity and quality workforce to drive much needed economic growth.

While ASEAN has advanced in leaps and bounds in increasing the opportunities for women in the last 50 years, the degree of investment in women across the region remains disparate.

Governments can focus on the following areas to create a conducive labor market that allows women to thrive:

- ▶ Mandating the minimum amount of support that women in the workforce should be entitled to, particularly in areas such as maternity leave and childcare benefits
- ▶ Encouraging the private sector to invest in capacity building for women through training and skills upgrading

Support for women in the workforce

All ASEAN countries have labor laws that prohibit gender discrimination. In reality, the ability to enforce and ensure compliance with such nondiscrimination laws is challenging, and this is evident from the persistent wage gaps and other displays of workplace discrimination.

Across ASEAN, provisions for maternity leave are well laid out, but there are varying policies on family and child support that are important for women as they continue to balance work and family commitments. Countries in ASEAN generally provide in excess of three months for maternity leave, with the exception of Malaysia and the Philippines with shorter maternity leave of 60 days.

It's worth noting that other than the Philippines, Myanmar and Vietnam, governments generally do not pay for maternity leave. Singapore and Thailand adopt a hybrid approach whereby their governments pay for a portion of maternity costs.

Governments can consider providing partial subsidies to alleviate increased cost pressures on companies, in the form of cash reimbursements or enhanced tax deductions to companies, or direct to employees.

It is worthwhile for ASEAN countries that are economically stronger with high levels of female participation in the workforce to consider paternity leave. Countries such as Singapore have made provisions for paternity leave, in addition to sharing parts of the maternity leave between both parents.

Policies to improve childcare access and quality are critical in ensuring that women in ASEAN are motivated to join, remain or re-enter the workforce after giving birth. ASEAN countries can consider providing subsidized childcare infrastructure to support mothers looking to re-enter the workforce. This is particularly important in developing ASEAN countries where childcare options are limited, and a significant percentage of women may not be formally employed, or are agricultural-based. Another alternative is to encourage companies to provide childcare support at the workplace through subsidies or enhanced tax deductions to allow companies to offset the costs of running childcare centers.

For higher-educated women, other forms of tax relief to encourage mothers to remain in the workforce include tax deduction on a certain percentage of childcare fees incurred or special tax rebates and deductions.



Government on employment provisions

Country	Duration of maternity leave	Childcare support	Government-mandated regulations to protect the rights of working women
 Singapore	<ul style="list-style-type: none"> ▶ 16 weeks ▶ Fully paid (50% by the employer, 50% by the Government, with the exception of the third and subsequent child whereby the Government covers 100% of the cost) ▶ Self-employed mothers may apply for government-paid maternity benefit 	<ul style="list-style-type: none"> ▶ 6 days of paid childcare leave yearly, first 3 days being employer-paid while the last 3 days are government-paid ▶ Childcare fees subsidized by employers are not taxable to the employee if the childcare center is licensed under the Child Care Centres Act 	<ul style="list-style-type: none"> ▶ Employers are required by law to pay maternity leave benefits to pregnant employees if they are dismissed without sufficient cause, or retrenched at any stage of their pregnancy
 Malaysia	<ul style="list-style-type: none"> ▶ 60 days, up to 5 surviving children ▶ Fully paid ▶ 100% paid for by the employer 	<ul style="list-style-type: none"> ▶ Childcare services in Malaysia are instituted so that women can partake in the labor force, with the Child Care Centre Act 1984 setting minimal standards and regulations 	
 Thailand	<ul style="list-style-type: none"> ▶ 90 days ▶ Fully paid (45 days by the employer, 45 days by the Employee Welfare Fund) 	<ul style="list-style-type: none"> ▶ Public childcare centers are sponsored by the Government 	<ul style="list-style-type: none"> ▶ Women are protected from termination of employment due to pregnancy
 Indonesia	<ul style="list-style-type: none"> ▶ 3 months ▶ Fully paid ▶ 100% paid for by the employer 		<ul style="list-style-type: none"> ▶ A pregnant woman must not be forced to work between 11:00 p.m. and 7:00 a.m. if she can provide a doctor's certificate stating that this would endanger her health
 Philippines	<ul style="list-style-type: none"> ▶ 60 days ▶ Fully paid out of the Social Security system ▶ Self-employed mothers may apply for maternity benefits 	<ul style="list-style-type: none"> ▶ Existence of a national policy to promote the establishment of day care centers in the workplace that provide full-day childcare programs matching parents' working hours ▶ Firms that partake in this will gain tax incentives that allow for the operating costs of corporate-based day care centers to be deducted from their taxable income, provided the employer does not charge users fees 	



Country	Duration of maternity leave	Childcare support	Government-mandated regulations to protect the rights of working women
 Myanmar	<ul style="list-style-type: none"> ▶ 14 weeks ▶ Fully paid out of the Social Security system ▶ May extend additional 4 weeks in case of twins or up to 6 weeks in case of a miscarriage 		
 Cambodia	<ul style="list-style-type: none"> ▶ 90 days ▶ Women who have worked at the company for one year or more are entitled to half of their wage ▶ Cash benefits extend to self-employed women 	<ul style="list-style-type: none"> ▶ For 1 year from the date of child delivery, mothers who breastfeed their children are entitled to 1 hour per day during working hours to breastfeed their children 	<ul style="list-style-type: none"> ▶ Women in Cambodia are protected by the law to not lose her job because of pregnancy
 Laos	<ul style="list-style-type: none"> ▶ 105 days ▶ Fully paid 		<ul style="list-style-type: none"> ▶ Employer cannot require pregnant women or women with a child under one year of age to carry heavy loads, stand for long periods, undertake dangerous work, work overtime or work on a day of rest
 Vietnam	<ul style="list-style-type: none"> ▶ 6 months²⁵ ▶ Fully paid out of the Social Security system 	<ul style="list-style-type: none"> ▶ Female workers taking care of children less than 12 months old can take 1 hour break per day for breastfeeding and still receive 100% of their salary 	<ul style="list-style-type: none"> ▶ Employees are entitled to health insurance when taking leave for prenatal check-up, caring for a sick child under seven years old, miscarriage or abortion
 Brunei	<ul style="list-style-type: none"> ▶ 105 days ▶ Fully paid for those who have been in service for more than 6 months, while those under will only be paid half ▶ Maternity benefits are not extended to the self-employed 		<ul style="list-style-type: none"> ▶ Women are entitled to rest, pay and protection against termination during maternity leave

²⁵ If a female employee has a twin or more babies at once, she is entitled to an extra 30 days of maternity leave for each additional child.

Education and skills development

The second area where the Government needs to play a strong role in advancing gender equality in the workforce lies in encouraging the private sector and the Government as employers to provide skills development and training to women in the workforce.

Incentives to encourage training are typically across the board, and not many are targeted at the needs of women across the life cycle in the labor force.

Many governments, particularly the less developed ASEAN countries, have taken on an active role to advocate training programs that are specific to women from the unskilled to skilled level. Many of these women lack basic vocational skillsets that allow them to participate actively in the labor market. Working with companies, associations or charities to heavily subsidize such training and development of certification programs through cash subsidies, similar to what Indonesia and Philippines have done, should be strongly encouraged.

Governments can proactively invest in other vocational education opportunities and expand training in sectors that are traditionally male-dominated, especially those in less-developed countries. Programs that promote the recruitment of unskilled workers or provide on-the-job learning opportunities can be doubly effective in incentivizing companies to hire and enable them to ramp up their workforce for success.

In addition, local or national women's associations can be brought on board to raise public awareness of the available courses. As less-educated women typically lack access to technology or resources to afford classroom fees, planners should ensure that promotional campaigns are creative and extend beyond the usual media channels while providing financial assistance to those seeking to enroll.

A number of governments across Asia-Pacific have adopted gender quotas to increase female representation in parliament, in line with the increasing calls in recent years for women to be better represented in leadership roles across ASEAN and globally. Governments can continue the momentum by encouraging or mandating political parties to propose a certain percentage of women to contest parliamentary roles or incentivize companies to invest in the development of female leaders.

Among corporates, there has been growing movement for women to take on leadership roles. Policies should focus on reducing the legal barriers for women and accelerating credentialing opportunities to empower women to obtain the necessary qualifications. Female professionals can benefit from better access to mentors or high-performing peers who can motivate them in their developmental journey and in advancing their careers. Programs aimed at developing women leaders should take into account their current quality of life and promote ways to enhance them.

Unskilled to skilled



Indonesia

- ▶ A government-launched training program in 2017 allows participants to develop and improve their skills for free. The program includes training, certification and work placement in a 3-month module, with the aim of training people in various industries ranging from shoes, clothing, electronics, ships to heavy machinery.



Philippines

- ▶ The Government provides cash support for a pilot skills training program whereby participating women will be trained in a wide range of skills including massage therapy, basic computing, business skills, baking and dressmaking.



Myanmar

- ▶ The Government launched the National Strategic Plan for the Advancement of Women in 2013 to address challenges in the development of better laws to eliminate gender-based violence and policies to promote equal rights to jobs, credit and resources. It also suggests ways to increase women's political leadership and reduce gender stereotyping.



Laos

- ▶ The Government worked with Laos Women's Union (LWU) to donate a plot of land to open the first women's shelter in Laos, which houses women who are victims of abuse or are homeless. It houses a vocational center that trains the women new job skills such as handicrafts, sewing and basic business management.



Brunei

- ▶ In Brunei's Vision 2035, there is a greater emphasis on equal opportunities for women in the workforce and nation building.
- ▶ Education has been made compulsory for everyone and the results show that there is a much higher percentage of female graduates.

Skilled to professional



Singapore

- ▶ The Government has training grants for companies looking to provide local employees with training courses that focus on innovation and technical skills.

Note: this is a generic policy that is applicable to all and not targeted only at female employees.



Malaysia

- ▶ The Government launched the Career Comeback program in 2015 whereby two grants - the Resourcing Grant and Retention Grant - were introduced to encourage employers to attract and retain women who have been on career breaks.
- ▶ The Government also introduced initiatives to unleash the economic potential of women, including the allocation of RM200m to Amanah Ikhtiar Malaysia, Malaysia's largest microcredit organization, to provide microcredit financing, benefiting mainly women entrepreneurs from the bottom 40% of income earners.



Vietnam

- ▶ The Government supported the Vocational and Technical Education Project by establishing a labor market information system, program accreditation and technical certification systems, improving access for women and minority students, staff development, cost recovery and private sector participation.

Professional to leadership



Singapore

- ▶ The Government has training grants for companies looking to provide local employees with training courses that focus on leadership.

Note: this is a generic policy that is applicable to all and not targeted only at female employees.



Malaysia

- ▶ Talent Corporation Malaysia (established in 2011 under the Prime Minister's Department) launched an eight-month program in 2014 to support the careers of women in business across all industry sectors who are one to three career stages away from a senior leadership or board role.



Thailand

- ▶ The Ministry of Social Development and Human Security implemented a five-year national Women's Development Plan (2012-2016) which includes training on campaigning and leadership skills to encourage women to run for local elections.



Indonesia

- ▶ It is mandated that each participating political party must have at least 30% female representation when they nominate candidates for the National House of Representatives, Regional House of Representatives and People's Representative Council Provincial for each electoral district.

Government fast forward to ASEAN 100

It is evident that the governments play an important role in advancing women and gender diversity as we move toward ASEAN 100. Depending on the stage of economic development, the focus areas and emphasis of government policy differ. For the less developed ASEAN countries, working on the foundation to support women participation in the workforce is key. This includes incentivizing companies to provide the necessary vocational training, regulatory enforcement on fair hiring practices and basic access to childcare facilities.

For the more developed ASEAN countries that already see a high level of female participation in the workforce, encouragement needs to be more collaborative, with more awareness on the longer-term tangible and intangible benefits for the employer. These initiatives can focus on guidance for women on board participation and leadership positions, push for greater transparency on women participation and progress within large corporates.

Governments can adopt the right balance of carrot and stick policies to ensure that the economic potential of women in ASEAN is realized.



Are women the key to accelerating economic progress across ASEAN?

Women in business have made great strides across ASEAN in the past 50 years. 16 of Forbes' 50 richest businesswomen in Asia hail from the region.²⁶ Women's participation has risen, particularly in rapidly growing economies such as the Philippines and Singapore, but has stagnated or fallen since 1990 in markets such as Thailand and Laos. Women in the region play a major economic role as business owners and entrepreneurs across many sectors, especially at the micro and small enterprise level.²⁷

²⁶ "Asia's 50 Power Businesswomen 2016," *Forbes Asia*, 6 April 2016, ©2017 Forbes Media LLC.

²⁷ *Projected Gender Impact of the ASEAN Economic Community*, ASEAN Secretariat, March 2016, ©2016 Association of Southeast Asian Nations (ASEAN).





Women continue to be overlooked as a source of talent to propel economic growth and prosperity across ASEAN. Women continue to face multiple challenges, from access to employment and leadership positions, wage parity to balancing work and family responsibilities.

At the workplace, men are far more likely than women to rise to senior positions in business, take on political positions, be successful entrepreneurs and earn higher salaries.²⁸ In ASEAN's developed markets, 12.5% of board members in Malaysia are women, followed by Indonesia at 11.1% and Singapore at 7.7%.²⁹

While Malaysia and Singapore have experienced increases of several percentage points since 2011-2012, board diversity in Indonesia has remained relatively unchanged. Research shows that an organization with 30% female leaders can add up to six percentage points to its net margin.³⁰ Boards with a higher-than-average percentage of women performed 36% better than those with a less-than-average representation.³¹

To accelerate achievement of gender parity in the workplace, we need purposeful action by both men and women to recruit, retain and advance women in the workplace. We celebrate the success of ASEAN business leaders as they redefine opportunities for future generations of women in ASEAN.

²⁸ Gender wage gap (indicator), © 2016 Organisation for Economic Co-operation and Development.

²⁹ Korn Ferry Diversity Scorecard 2016: *Building Diversity in Asia Pacific Boardrooms*, 19 April 2016, ©2016 Centre for Governance, Institutions & Organisations (CGIO) and Korn Ferry.

³⁰ Marcus Noland, Tyler Moran, Barbara Kotschwar, *Working Paper Series: Is Gender Diversity Profitable? Evidence from a Global Survey*, February 2016.

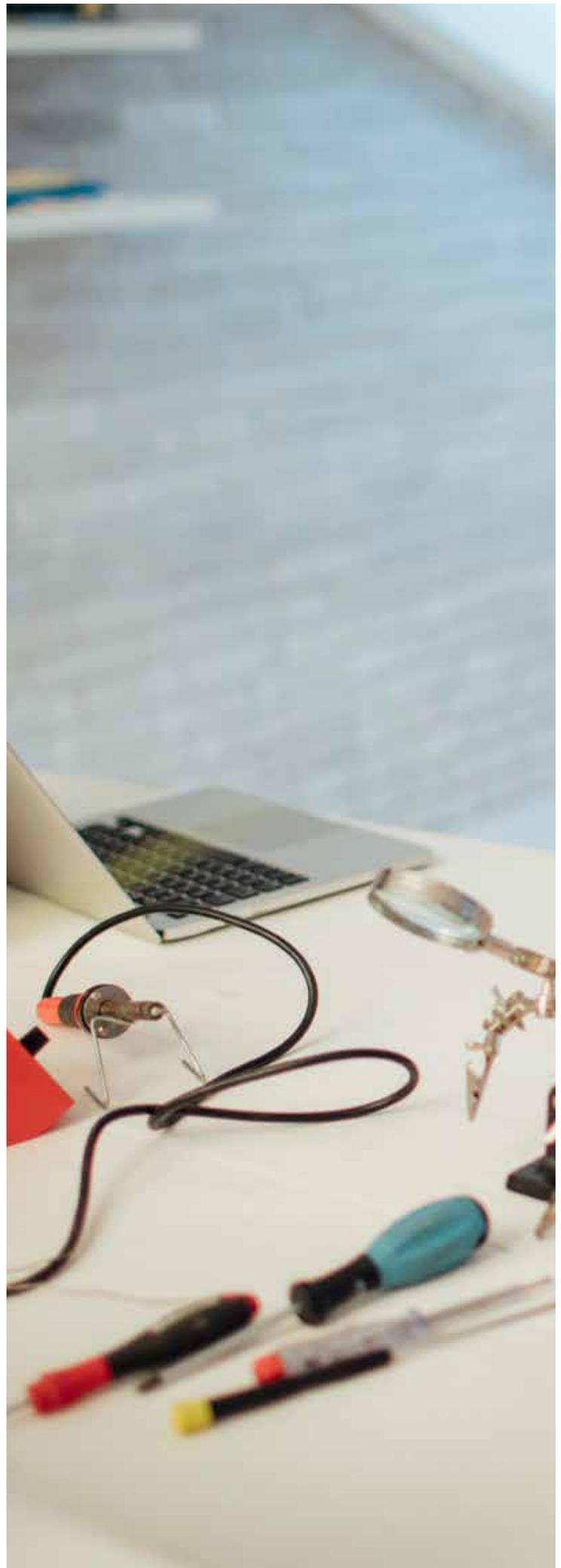
³¹ "36% better return on equity for boards with more women," *Financial Times*, 6 December 2015, © THE FINANCIAL TIMES LTD 2017.



Ambassador Delia D. Albert

Senior Adviser,
SGV & Co. Philippines

“The ASEAN region is still dominated by many gaps. There are horizontal gaps that consist of development gaps between and among the member countries, as well as gender equality gaps. There are also the vertical gaps between women who are well-educated and have better access to leadership roles and those who have fewer possibilities and are stymied by economic and social circumstances. These gaps hinder the possibilities for leadership roles.”





World Economic Forum (WEF) *Global Gender Gap Report 2017*

The WEF *Global Gender Gap Index* measures gender-based disparities and tracks their progress over time. The index benchmarks gender gaps in four key areas: economic, education, health and politics. The Economic Participation and Opportunity Subindex measures the economic participation, wage and advancement gaps.

Economic Participation and Opportunity Subindex ranking

Country	Ranking
Laos	22
Thailand	24
Philippines	25
Myanmar	26
Singapore	27
Vietnam	33
Cambodia	56
Brunei	61
Malaysia	87
Indonesia	108

With the widening global economic gender gap, the WEF estimates it will take another 217 years to achieve gender parity. Some regions are projected to narrow their gender gaps faster with South Asia expected to close the gender gap in 62 years and Western Europe in 61 years. The projection for East Asia is 161 years.



Accelerating women's progress at the workplace

EY report *Navigating disruption without gender diversity?* outlined five disconnects holding back gender diversity in business³²:

- 1 Reality disconnect: Boards believe they are addressing gender diversity faster than the WEF's forecast to gender parity.
- 2 Data disconnect: Fewer than half of the organizations surveyed have programs to formally measure progress in gender parity. Metrics used don't effectively gauge the pipeline of women for leadership roles.
- 3 Pipeline disconnect: While 72% of companies surveyed say they are effective in attracting and retaining women, only 18% have formal programs to identify and develop women for leadership.
- 4 Perception disconnect: Men and women have different perceptions of the lack of diversity in senior positions.
- 5 Progress disconnect: Industry sectors differ in views on whether leadership teams are sufficiently diverse.

These disconnects are disappointing and somewhat surprising. But recognition of the disconnections presents the opportunity to act. Gender diversity in business is within the influence of business leaders, boards and the workforce. What do we need to do to accelerate women's advancement in the workplace?



Susan Chong

Chief Executive Officer,
Greenpac (S) Pte. Ltd.
EY Entrepreneur Of The Year 2014
Singapore – Sustainable Packaging
Solutions and EY Entrepreneurial Winning
Women, Asia-Pacific, Class of 2015

“Ability is everything to speak for.
Let our performance reveal our
worth and value.”

³² *Navigating disruption without gender diversity*, EYGM Limited, 2017.

Create a pipeline of women leaders

The female leadership barrier needs to be addressed by focusing on presenting opportunities rather than placing women in key positions as a band-aid solution. A study of 222 international corporate companies shows men and women representation in jobs are approximately equal at entry level.³³ The gender balance changes as it gets higher up the organization ladder. This has significant implications as promotions are not just a recognition of talent; it also mean more rewards and incentives, more challenging assignments to shine and opportunities to interact with the organization's leadership.

In implementing programs and establishing a talent pipeline that identifies, nurtures and promotes female talent, leaders need to better understand the barriers to women's career development and take the necessary steps to break them down.

Boards and their nominating committees must consciously broaden their search criteria and present a more diverse pool of candidates across genders. Challenge the nominating committees and management teams to seek board or leadership candidates that are not similar to the current profile of leaders.

PepsiCo has increased female representation in senior management roles from 0% to 33% within two years, but this would not have been possible if not for the introduction of Strategies for Success, an internal program that offers women in management the necessary coaching, skills training and mentorship that are critical for these women to move to the next level.³⁴ PepsiCo now engages women across the whole supply chain as it empowers women role models to share and support one another through experiences.



Datuk Siti Zauyah Binti Md Desa

Deputy Secretary General (Policy),
Ministry of Finance, Malaysia

“I have never looked at being a woman as a major challenge to progress in my career. My main focus is to stay professional in delivering my job and ensure I stay relevant. I suppose the challenge is in having to work hard, equip myself with the right knowledge and skills, and be tactful when dealing with people.”

³³Women in the Workplace 2017, ©Copyright 2017 LeanIn.Org, ©1996 -2017 McKinsey & Company.

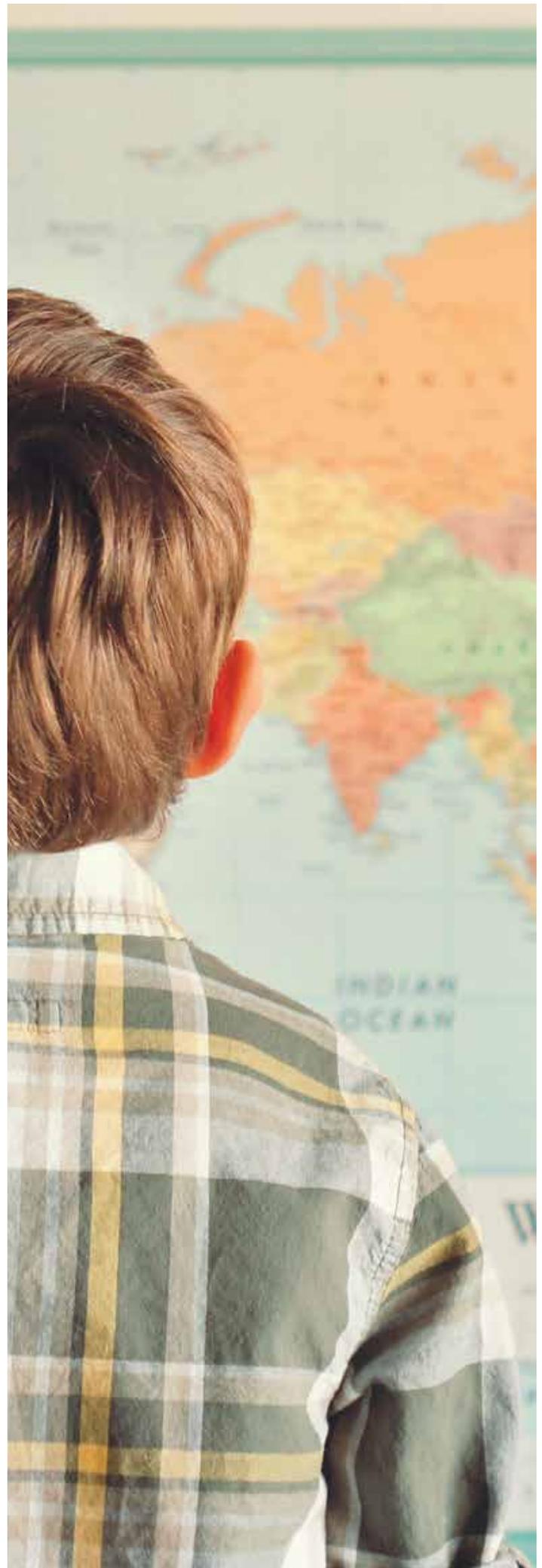
³⁴“Women in Leadership: Why quotas are out and openness is in at PepsiCo,” *The Guardian*, 17 April 2013, ©2017 Guardian News and Media Limited.



Helene Raudaschl

Managing Director,
Indoguna Singapore Pte. Ltd.
EY Entrepreneur Of The Year 2016
Singapore - Food and Beverage
Distribution and EY Entrepreneurial
Winning Women, Asia-Pacific,
Class of 2017

“A positive mindset, determination and perseverance are very crucial to being a leader. Together with the traits of leading by example, instilling knowledge into your employees, sharing experiences all play a big part of being a great leader. We inspire people and not to only tell them what to do. As we can all appreciate, our employees are the biggest asset in our balance sheet that’s not recorded.”





Datuk (Dr.) Hafsah Hashim

Chief Executive Officer,
SME Corp. Malaysia

“Women must be given the trust and opportunities to lead and be part of the ecosystem. Women leaders understand survival, renewal and reinvention. They are determined and are not afraid to fight for what they believe in or what they want to achieve. They need support and the chance to be part of something big and contribute to the betterment of the larger group.”

Embrace technology rather than fear it

Globally, it is anticipated that smart machines could replace 33% of jobs by 2025. In ASEAN, AI and automation are on the rise, with one in five employees in Singapore and Malaysia believing that automation will take away their jobs.³⁵

Organizations are now challenged to put individuals at the core of their businesses. For instance, a digital workforce should be enabled to be better connected for collaboration locally and globally. Soft skills such as creativity and empathy are essential in the digital age - from the coders who build AI software to the cybersecurity experts who protect the system.

Understanding consumer behaviors, preferences and behavioral trends all point toward being more human-centered. Job displacements may be skewed negatively against the female workforce, but there are opportunities for women to lead the change in embracing the more human side of work.

Increase and enable access to financing and resources

In a 2014 World Bank report, women-owned SMEs represent 30% to 37% of all firms (approximately 8 million to 10 million) in emerging markets,³⁶ requiring between US\$260-320b a year in funding and capital.

Public and private sector efforts and investments continue to open markets to women entrepreneurs across ASEAN. For example, Goldman Sachs launched its 10,000 Women Initiative in 2008 to provide training and support networks in developing countries. Intel launched She Will Connect, a program that aims to help 5 million women in Africa access the internet. In Singapore, there has been a rise in social enterprise investment targeting ASEAN such as the Women's Livelihood Bond, a program launched by the Singapore Exchange that offers loans to 385,000 women in the Philippines, Thailand and Vietnam.



Pham Thi Viet Nga

Chairman, DHG Pharmaceutical Joint Stock Co., and one of Vietnam's top 5 EY Entrepreneur Of The Year Winner in 2014

“Nature has created women with a heart of gold. As business women, let's use our hearts to create quality products for the consumers.”

In the Philippines, legislation such as the law on Gender and Development (GAD) has been a major factor in enabling women work outside of home. The GAD Budget requires government entities to allocate 5% of their total budget to address the needs of working women, such as funding day care centers that allow women to send their young children near their workplace. This support incentivizes women professionals and staff to work full-time while raising a family.

This was followed by Magna Charta for Women, a legislation that facilitates equal access to work opportunities for women. Institutionalizing best practices to enable both genders to recognize equal responsibilities in a partnership will help alleviate the dual roles that women are usually expected to play in society.

³⁵ *Ranstad Employer Brand Research 2017*, Ranstad Group, ©2017 Randstad Pte. Limited.

³⁶ “Expanding Women's Access to Financial Services,” *The World Bank*, 26 February 2014, ©2017 The World Bank Group.



Work-life integration for better productivity

According to an OECD report on the future of women in the workforce,³⁷ greater workplace flexibility benefits working mothers and employees in general.

In Asia, workplace flexibility is about pushing the boundaries on the culture of work. Moving toward an environment of high team trust and empowerment allows for more flexibility around work hours and locations.

Closing the gender gap does not solely focus on women. Men's reluctance to fully utilize paternity leave benefit may have an unintended impact on women's progress in the workplace, as it reinforces the outmoded view of childcare being mainly a woman's responsibility. Research by EY and the Peterson Institute for International Economics found that companies with better paternity leave practices are also better at building a pipeline of female talent.³⁸



Ambassador Delia D. Albert

Senior Adviser,
SGV & Co. Philippines

“In view of the varying stages of development and systems in the 10 member countries of ASEAN, different types of support may be considered according to the needs of each individual country.”

³⁷ Policy brief on the future of work - Going Digital: The Future of Work for Women," OECD, July 2017, © OECD 2017.

³⁸ Marcus Noland, Tyler Moran, Barbara Kotschwar, Working Paper Series: Is Gender Diversity Profitable? Evidence from a Global Survey, February 2016.



Lisa Mihardja

Founder and Chief Executive Officer,
Alleira Batik
EY Entrepreneurial Winning Women
Indonesia, Class of Winners 2012
and EY Entrepreneurial Winning Women
Asia-Pacific, Class of 2016

“The most difficult challenge that I faced in the first few years of building the Alleira Group was choosing between family and business. It was a struggle to find smart and better ways to balance family and business life. The feeling of guilt and pressure did not make me a happy and productive entrepreneur.

Now I have learned to balance my life with the full support of my husband, children and extended family.”

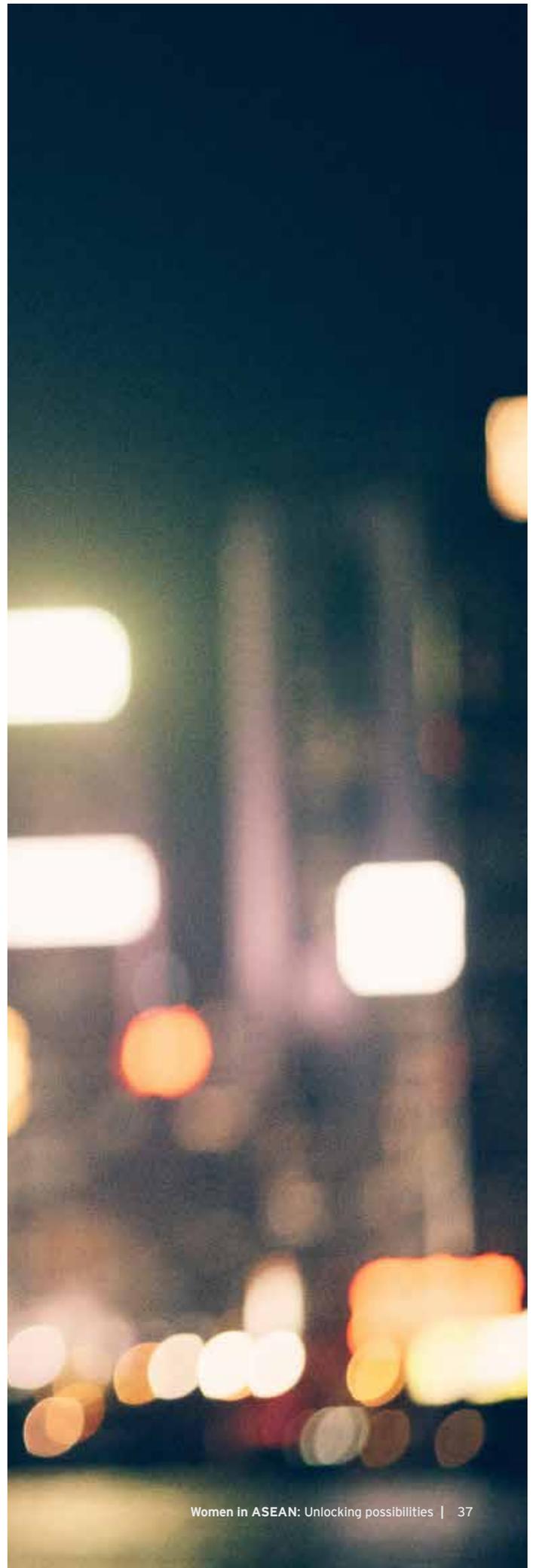


Datuk (Dr.) Hafsah Hashim

Chief Executive Officer,
SME Corp. Malaysia

“Being an efficient leader while maintaining a well-balanced life is always a constant challenge. I remind myself that no resource is more powerful in an organization than a high-performance team. Individuals cannot accomplish things on their own, but good teamwork can.

A high-performance team in an organization can only be effective in an environment that is conducive, flexible and happy. Only then can an organization be productive and strong!”







Helene Raudaschl

Managing Director,
Indoguna Singapore Pte. Ltd.
EY Entrepreneur Of The Year 2016
Singapore - Food and Beverage
Distribution and EY Entrepreneurial
Winning Women, Asia-Pacific,
Class of 2017

“For women, having a family is just as important as having a great career. I do not think the modern world will change that. Perhaps there will be compromise, but it will never reduce the importance of the family. The challenge as the world gets more competitive is, how does a woman balance her family and career?”





Conclusion

Traditionally, men have been breadwinners, while the women's role is to care for the family and household.

In the last few decades however, the question "What is a gender role?" has become harder to answer as the line between work and family overlaps.

There's no one-size-fits-all solution that addresses the challenges that women face in advancing their careers. Recognizing the imperative to accelerate gender parity, coupled with the willingness to lead change, will lay the foundation.

The institution of the family and its support system become more important as we experience cultural shift with more women in demanding jobs and men are opting to stay home for the family. This cultural and demographic shift can be attributed to the focus on an individual's competencies and not their gender. When we play to our strengths, we all win!

There will always be differences between men and women; appreciate the natural variety of human existence and make decisions based on strengths, interests and competencies.

Women of today need to be good role models to show the future generations that no one should be limited because of their gender. Let's invest in a future where we break the mold of gender roles to build a better working world.



At EY, we are determined to do our part to accelerate women's progress in the workplace. We've worked hard for many years to create effective internal and external programs focused on women's advancement and leadership around the world – and we know there is more to do.

Now, we've brought all our efforts together to create one unifying accelerator. Through **Women. Fast forward**, we will use our collective knowledge, experiences and convening power to push ourselves further and do our part to accelerate the global gender parity clock. It's time.

Share your thoughts with us at:
www.ey.com/womenfastforward





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