

DEVELOPMENT TRAJECTORIES IN GLOBAL VALUE CHAINS



## Gender and Work in Global Value Chains Capturing the Gains?

Stephanie Barrientos



## Advance Praise

We live in a world of global value chains, which link thousands of firms, large and small, across multiple cultural and political boundaries. Global value chains have changed how consumers interact with global corporations and their suppliers, and impacted the working conditions of millions of people employed in farms, factories and retail stores across the world. Building on years of detailed empirical research across different industries and in several countries, Barrientos shows how global value chains are also reshaping the gender profile of work across several middle- and low-income countries. Gendered patterns of work in these global value chains can both relegate women workers to poorly paid and unrecognized labor or lead to economic empowerment and enhanced worker rights. The conditions and mechanisms that lead to these alternative outcomes are beautifully detailed in this cutting edge piece of research. *Gender and Work in Global Value Chains* is a *tour de force* that will fundamentally change the way we think of the world of work and the gendered dynamics shaping the global economy.

**Richard M. Locke**, Schreiber Family Professor of  
Political Science and International and Public Affairs,  
Brown University

Based on over 10 years of research across the globe and case studies from Africa, Asia and Latin America, *Gender and Work in Global Value Chains* provides an illuminating study of contemporary working relations and gender discrimination. Exploitation and low and uncertain wages are rife but not all is gloom and doom. Some women producers and progressive firms (as a consequence of the research) have recognised that women's 'socialised skills' increase product quality and speed of delivery. While the firms capture most of the gains, by organising, some women have improved their working conditions and secured support for domestic work and care.

**Diane Perrons**, Professor Emerita in Feminist Political Economy,  
The London School of Economics and Political Science

Based on her excellent work on *Capturing the Gains* research programme, this book introduces global chains in a balanced, sophisticated and highly intelligent way. Barrientos is passionate about using GVCs to improve conditions of work of those who labour along these chains through advocating a stronger regulation of capital. She argues that this can be done only through a 'constant process of engagement, bargaining and contestation'. This book will be an excellent

contribution to the debates on GVCs and their importance in understanding production, exploitation and the campaigns to improve the way we consume.

**Shirin Rai**, Professor of Politics and International Studies,  
TheUniversity of Warwick

This empirically rich, multi-layered and insightful book breaks down the barriers around global value chain analysis to demonstrate how these chains have been shaped by and are reshaping gender relations across the wage production and social reproduction divide. Importantly, it allows for women's agency and for gender relations to open to change by exploring not only the very considerable evidence of exploitation and undervaluation of women's work but also evidence of the contestation of these conditions and associated gendered norms.

**Jill Rubery**, Professor of Comparative Employment Systems,  
The University of Manchester

## Gender and Work in Global Value Chains

This book focuses on the changing gender patterns of work in a global retail environment associated with the rise of contemporary retail and global sourcing. This has affected the working lives of hundreds of millions of workers in high-, middle- and low-income countries. The growth of contemporary retail has been driven by the commercialized production of many goods previously produced unpaid by women within the home. Sourcing is now largely undertaken through global value chains in low- or middle-income economies, using a 'cheap' feminized labour force to produce low-price goods. As women have been drawn into the labour force, households are increasingly dependent on the purchase of food and consumer goods, blurring the boundaries between paid and unpaid work. This book examines how gendered patterns of work have changed. It explores who captures the gains, and the extent to which global retail opens up new channels to leverage more gender-equitable gains in sourcing countries.

**Stephanie Barrientos** teaches at the Global Development Institute at the University of Manchester. She has researched and published widely on gender, global production, employment, decent work, trade and labour standards, corporate social responsibility, fair trade, and ethical trade. Stephanie has advised and provided training for a number of companies, NGOs and international organizations on issues concerning gender, agribusiness, ethical trade, decent work, and impact assessment. She held the Leverhulme Major Research Fellowship (2013–15) examining gender and work in global value chains.



## Development Trajectories in Global Value Chains

Globalization is characterized by the outsourcing of production tasks and services across borders, and the increasing organization of production and trade through global value chains (GVCs), global commodity chains (GCCs), and global production networks (GPNs). With a large and growing literature on GVCs, GCCs, and GPNs, this series is distinguished by its focus on the implications of these new production systems for economic, social, and regional development.

This series publishes a wide range of theoretical, methodological, and empirical works, both research monographs and edited volumes, dealing with crucial issues of transformation in the global economy. How do GVCs change the ways in which lead firms and suppliers shape regional and international economies? How do they affect local and regional development trajectories, and what implications do they have for workers and their communities? How is the organization of value chains changing and how are these emerging forms contested? How does the large-scale entry of women into value-chain production impact gender relations? What opportunities and limits do GVCs create for economic and social upgrading and innovation? In what ways are GVCs changing the nature of work and the role of labor in the global economy? And how might the increasing focus on logistics management, financialization, and social standards and compliance shape the structure of regional economies?

This series includes contributions from all disciplines and interdisciplinary fields related to GVC analysis and is particularly supportive of theoretically innovative and informed works grounded in development research. Through their focus on changing organizational forms, governance systems, and production relations, volumes in this series contribute to on-going conversations about development theories and policy in the contemporary era of globalization.

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**Stephanie Barrientos** is Professor of Global Development at the Global Development Institute, University of Manchester.

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# **Gender and Work in Global Value Chains**

Capturing the Gains?

Stephanie Barrientos



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*For Armando, Kim and Ricardo*



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# Abbreviations

AACT	Action, Collaboration, Transformation
AGOA	African Growth and Opportunity Act
AgriSETA	Agricultural Sectoral Training and Education Authority
APEC	Apparel Export Promotion Council (India)
BCEA	Basic Conditions of Employment Act
BGMEA	Bangladesh Garment Manufacturers and Exporters Association
BKMEA	Bangladesh Knitwear Manufacturers and Exporters Association
BRIC	Brazil, Russian, India and China
BSCI	Business Social Compliance Initiative
BSR	Business for Social Responsibility
CAD	computer-aided design
CAP	community action plan
CBA	collective bargaining agreement
CCC	Clean Clothes Campaign
CCP	Cadbury Cocoa Partnership
CIF	cost, insurance and freight
CL	Cocoa Life
CMT	cut-make-trim
COCOBOD	Ghana Cocoa Marketing Board
CSO	civil society organization
CtG	Capturing the Gains
DC	distribution centre
DFID	Department for International Development (UK)
DIP	delivered in port
EDI	electronic data interchange
EFTA	European Fair Trade Association
EM	Equitable Manufacturing
EPOS	electronic point of sales
EPZ	export processing zone
ESTA	Extension of Security of Tenure Act
ETI	Ethical Trading Initiative
EU	European Union

FFV	fresh fruit and vegetables
FGD	focus group discussion
FLA	Fair Labor Association
FLO	Fair Trade Labelling Organisations International
fob	free on board
FTAO	Fairtrade Advocacy Office
FTE	full-time equivalent
GCC	global commodity chain
GDP	gross domestic product
GEPC	Ghana Export Promotion Council
GPN	Global Production Network
G(r)PN	Global (re)Production Network
GSCP	Global Social Compliance Programme
GSP	Generalised System of Preferences
GVC	Global Value Chain
HACCP	Hazard Analysis Critical Control Point
HEBI	Horticulture Ethical Business Initiative
HRW	Human Rights Watch
ICCO	International Cocoa Organization
ICI	International Cocoa Initiative
ICT	Information and Communication Technology
IDS	Institute of Development Studies
IFAT	International Federation for Alternative Trade
IFC	International Finance Corporation
ILO	International Labour Organization
IMF	International Monetary Fund
IP	implementing partner
IPL	International Procurement & Logistics
IT	information technology
ITC	International Trade Centre
ITGLWF	International Textile, Garment and Leather Workers' Federation (now IndustriALL)
ITUC	International Trade Union Confederation
JETI	Joint Ethical Trading Initiatives
JIT	just-in-time
KEWWO	Kenya Women Workers Organization
KFC	Kenya Flower Council
KHRC	Kenya Human Rights Commission
LBC	licensed buying company
MCF	Make Chocolate Fair
MFA	Multi-Fibre Arrangement

MOFA	Ministry of Food and Agriculture
MSI	multi-stakeholder initiative
MWCD	Ministry of Women and Child Development (India)
NCR	National Capital Region (India)
NEWS!	Network of European World Shops
NGO	non-governmental organization
NIC	newly industrializing country
NOIDA	New Okhla Industrial Development Authority
ODM	original design manufacturing
OECD	Organisation for Economic Co-operation and Development
OEM	original equipment manufacturing
QIZ	qualifying industrial zone
RMG	ready-made garment
RP	retail price
SAI	Social Accountability International
SAP	structural adjustment programme
SATGI	South African Table Grape Industry
SIZA	Sustainability Initiative of South Africa
SMETA	Sedex Members Ethical Trade Audit
SMSI	Sourcing & Manufacturing Sustainability Index
SNV	Netherlands Development Organisation
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNGP	United Nations Guiding Principles on Business and Human Rights
US	United States
USA	United States of America
USDA	United States Department of Agriculture
WCF	World Cocoa Foundation
WE	Leadership Mindset and Worker Engagement
WEE	Women's Economic Empowerment
WFP	Women on Farms Project
WIEGO	Women in the Informal Economy Globalizing and Organizing
WISC	Women in Supply Chain
WOW	Work and Opportunities for Women
WRC	Workers Rights Consortium
WTO	World Trade Organization
WWW	Women Working Worldwide



# Preface

Books are often the product of a long journey, and this one is no exception. In the 1990s, much was being made of the ‘Chilean economic miracle’ resulting from trade liberalization implemented under the Pinochet dictatorship. As a postgraduate student of international trade and development with an interest in gender and labour in Chile, I wanted to examine the costs of this ‘miracle’ in the fruit export sector for the large female temporary labour force (*las temporeras*) employed each season. As part of this research, I undertook focus group discussions with groups of women fruit workers in the lower reaches of the Andes north of Santiago. This encounter dispelled many naïve assumptions I had started out with and highlighted the complexities of globalization for women workers.

Unsurprisingly, I found that, during the fruit season, *las temporeras* endured exceptionally long hours, with poor pay and few rights. In my discussions with workers, I enquired about their ‘bad’ experiences working in multinational and domestically owned export companies. However, I soon learnt from workers that, despite many problems, the work also provided them with economic independence relative to their previous situation. I met some very forthright *temporeras*, one of whom forcefully said, ‘We have always worked hard. NOW we are being paid for it.’ They preferred working for multinationals because they offered better pay and conditions than domestically owned companies. From then on, I have been more careful in my research to investigate both the challenges and opportunities for women working in global export production.

This same research also opened my eyes to the changing dynamics of trade, which conventional economics and political economy at the time were not addressing. This came about initially through a misunderstanding. My learnt Castilian was a potential barrier to comprehending the local dialect of workers. A couple of times in one focus group, workers mentioned ‘la visita de tesco’. When I enquired what ‘tesco’ meant, I was met with disbelief and laughter—they were referring to the UK supermarket Tesco. I was amazed that temporary workers in the foothills of the Andes were aware of a UK supermarket located on a different continent.

Perplexed, I enquired further. The story then unravelled that once a year, a man from Tesco visited the packhouse where they worked as seasonal labourers. They all knew when the Tesco visit was due, because a special toilet was unlocked and workers were given permission to use it. As soon as the visit was over, the toilet was relocked until the next visit.

I was intrigued. First, what was someone from Tesco doing over 7,000 miles away from the UK in the foothills of the Andes? Second, why was he bothering to check the toilet? Third, if he (and in the mid-1990s it was invariably a 'he') was concerned about the sanitary facilities workers were using, could he not also investigate the fact that the women worked long hours, in unhealthy conditions, seven days a week during the season, for relatively little pay?

On return to the UK, I did three things that set me on the path leading to this book. First, after some perseverance, I arranged a research interview with the Tesco buyer responsible for fruit procurement from Chile. He patiently explained the fruit value chain and why inspecting the sanitary conditions of the toilet was important for fruit hygiene and quality (I did not have the heart to tell him that in at least one packhouse, the toilet was locked outside of Tesco visits).

Second, from this I realized the importance of understanding the changing commercial dynamics of trade through value chains that is ignored by conventional economic theory. This investigation led me to the academic writings of Gary Gereffi on global commodity chains (Gereffi 1994b), which have informed my research ever since.

Third, I contacted the Fairtrade Foundation in London, which was at that time a small organization with only a few full-time employees. My question was whether Chilean fruit could in future come under Fairtrade certification. The response was that, ethically, it would be a good idea, but given its limited size and resources, Fairtrade could not possibly cope with fresh produce (how things subsequently changed!). All three of these dimensions have been at the heart of my research ever since.

This book builds in large part on the long journey that followed. My research has advanced mainly through collaborative studies involving value chain research on workers in export production in many sectors and developing countries that is destined for large Northern supermarkets and retailers. These sectors have included fresh fruit, vegetables, flowers, cocoa, tea, garments and footwear in countries across Africa, Asia and Latin America.

The research projects have all had a gender component (some have been more gender focused than others). This I deem essential, given the large number of women workers found in export production, often in countries with a limited history of female waged work. These studies have helped highlight the many problems and low incomes endured by workers and small-scale farmers in value

chains that can generate billions of dollars in profit. However, it has also helped unpack the opportunities created for some, particularly those who are able to secure better jobs and incomes.

A value chain approach provides the potential to aid nongovernmental organizations (NGOs) in leveraging improvements for workers in the global economy through advocacy and campaigns, to promote better conditions and returns for workers and small-scale farmers. Fairtrade has grown from its small beginnings to a large programme covering 1.65 million farmers and workers worldwide,<sup>1</sup> with related initiatives such as Utz and Rainforest Alliance following in its wake. I witnessed the setting up in 1998 of a parallel programme, the Ethical Trading Initiative (ETI), as an alliance of companies, trade unions and NGOs focusing specifically on labour conditions in retailer value chains.<sup>2</sup>

The ETI code of labour practice, based on core International Labour Organization (ILO) conventions, now covers over 10 million workers in its company members' supply chains across over 130 countries. Labour codes have set minimum conditions for Chilean fruit workers, and with social auditing I would be very surprised if the toilet door remains locked between Tesco visits today! Indeed, Tesco was a founding member of ETI. Yet, despite all these advances, pressing problems remain.

Export manufacture has opened up job opportunities for tens of millions of women workers, often coming from rural communities. This can bring benefits for more skilled workers who are able to earn better incomes. But many women are concentrated in the most insecure low-paid work. Downward commercial pressures in value chains have contributed to labour casualization and subcontracting, with the use of undocumented migrant workers and even forced labour found in some locations. Long years of declining supplier prices, rising costs of quality standards and lack of public investment in rural communities have driven many small-scale farmers out of agricultural production. Automation and e-commerce are threatening jobs across global retail value chains.

The wealth of information and knowledge that provides the foundation for this book has been acquired gradually through multiple research projects involving important collaborations with different researchers across organizations and countries. My early research in Chile led to a joint publication with Anna Bee, Anne Matear and Isabel Vogel (Barrientos et al. 1999). This led to a collaboration with Sharon McClenaghan and Liz Orton from Christian Aid in the late 1990s, which examined labour conditions in the South African fruit sector. This aimed to provide more substantive investigation of the country's

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<sup>1</sup> See <http://www.fairtrade.org.uk/What-is-Fairtrade/Facts-and-Figures> (accessed June 2017).

<sup>2</sup> See <https://www.ethicaltrade.org> (accessed June 2018).

labour situation following concerns that Christian Aid's supermarket campaign needed to be better informed (Christian Aid 1996; Barrientos, McClenaghan and Orton 2000). This was followed by a more in-depth study of gender and ethical trade undertaken with Catherine Dolan, Sally Smith, Anne Tallontire and Maggie Opondo in Kenya, South Africa and Zambia that provided important comparative insights into the challenges and benefits for women workers in African horticulture (Barrientos, Dolan and Tallontire 2003; Smith et al. 2004).

I also benefited greatly from collaboration with Andrietta Kritzing and Hester Rossouw at the University of Stellenbosch examining the changing dynamics of labour in the South African horticulture sector. This provided insights into the dichotomy between improved conditions for permanent and packhouse workers versus the casualization of labour in response to legislative changes, as well as pressures on growers from supermarket buyers (Barrientos and Kritzing 2004; Barrientos, Kritzing and Rossouw 2004; Kritzing and Barrientos 2004).

An impact assessment for the ETI, which I led with Sally Smith from 2004 to 2006 while at the Institute of Development Studies (IDS), provided a better understanding of the commercial dynamics of value chains. This examined implications of the ETI Base Code for workers across retailer value chains in three sectors (fruit, apparel and footwear) sourcing from five countries (Costa Rica, India, South Africa, UK and Vietnam, with a scoping study in China). This involved a team of researchers, including Di Auret, Naila Kabeer, Andrietta Kritzing, Kanchan Mathur, Khalid Nadvi, Hester Rossouw and Atul Sood. This was one of the earliest studies to provide grounded evidence of both the benefits and limitations of corporate codes of labour practice (Barrientos and Smith 2007), complementing research undertaken by Richard Locke and colleagues in the USA (Locke 2013).

Research commissioned by Cadbury on the economic and social resilience of the cocoa–chocolate value chain followed years of decline for cocoa farmers and their communities. I led this research in Ghana in collaboration with Kwadwo Asenso-Okere (now sadly deceased) and his colleagues at the University of Ghana and in India with Sukhpal Singh and Amanda Berlan. This informed programmes developed by Cadbury and later Mondelez to support cocoa farmers and their communities, and also women in cocoa production. These included Cadbury's adoption of Fairtrade in 2008 and later Mondelez Cocoa Life, both indicative of the positive role companies can play (Barrientos 2014b; Barrientos 2016; Barrientos et al. 2008).

The need for a stronger regulatory framework, at both national and international levels, has been a finding in most of my research. One of the most disturbing projects I have participated in (with Jennifer Frances and Ben Rogaly), following the death of 23 Chinese cockle pickers in Morecombe Bay in the UK, examined the role of 'gangmasters' in UK agriculture, often using undocumented migrant

workers (Frances, Barrientos and Rogaly 2005). The Morecombe Bay tragedy led to pressure from many quarters (including the Transport and General Workers Union, the ETI and some supermarkets) for more effective legislation. This led to the introduction of the UK Gangmasters (Licensing) Act, followed many years later by the UK Modern Slavery Act. Similar moves have occurred in other countries, demonstrating the need for better legislation to address the underbelly of poor working conditions in a globalized economy.

I went on to collaborate with Gary Gereffi, and jointly we co-directed the Capturing the Gains research programme from 2008 to 2013. This was an international network of 40 researchers in 20 countries examining economic and social upgrading and downgrading of workers in global value chains across a range of sectors (apparel, horticulture, information technology and tourism).<sup>3</sup> It was led by a research team also involving Michelle Christian, Barbara Evers, Gary Gereffi, Shane Godfrey, Joonkoo Lee, Fritz Mayer, William Milberg, Dev Nathan, John Pickles, Anne Posthuma and Arianna Rossi. Collaborators in many countries also made important contributions. Capturing the Gains highlighted the rapidly changing dynamics of value chains following the 2008 financial crisis and the rise of retailers and brands within Africa, Asia and Latin America (Barrientos, Gereffi and Rossi 2011; Pickles, Barrientos and Knorringa 2016; Barrientos et al. 2016). Capturing the Gains research provided an important foundation for the argument developed in this book. It demonstrated that social upgrading could occur in line with economic upgrading but this was not automatic. Enhancing conditions and rights for workers required proactive interventions by all actors, including companies, civil society, governments and multilateral organizations. This raised serious questions as to whether the private sector alone could address longer-term challenges of sustainable development in a globalized economy. My research has also long been informed by participation in a wider network of researchers in Europe and the USA examining similar issues. These include Mark Anner, Matthew Amengual, Jennifer Bair, Greg Distelhorst, Alex Hughes, Peter Knorringa, Richard Locke, Mike Morris, Florence Palpacuer, Stefano Ponte, Lone Riisgaard, Dara O'Rourke, Adrian Smith, and Cornelia Staritz.

This brief overview provides just a glimpse of the importance collaboration has played in generating research on workers in global value chains across sectors and countries. Updating this wealth of information and bringing it together into a single monograph was made possible by a Leverhulme Major Fellowship (2013–16) dedicated to researching and writing this book. The work was also facilitated by positions as a visiting scholar at Duke University (particular thanks to Gary

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<sup>3</sup> For more information see [www.capturingthegains.org](http://www.capturingthegains.org) and the Duke University Global Value Chains Centre <https://gvcc.duke.edu> (both accessed June 2018).

Gereffi and Mike Hensen), the University of Cape Town (particular thanks to Shane Godfrey and Margaret Visser) and the National University of Singapore (particular thanks to Neil Coe and Henry Yeung).

Over many years, I have benefited from participation in an informal network of feminist researchers. Diane Elson, Ruth Pearson, Diane Perrons and Shirin Rai have all provided inspiration and feedback at critical times in developing my nascent ideas. Colleagues and postgraduate students at IDS (particularly Raphie Kaplinsky and Khalid Nadvi) have also stimulated my thinking and sometimes collaborated. Their work has informed my understanding of the challenges of promoting labour standards and sustainable development in a global value chain context (Kaplinsky 2005; Nadvi 2008).

Likewise, colleagues, postdoctoral fellows and PhD students at the University of Manchester have provided a fertile environment since 2008 for the development of my arguments through ongoing discussion, seminars, workshops and conferences. In particular, those in the Global Production Network (GPN), Labour and Trade research group (led by rotating postdoctoral and PhD students), the Fairness at Work Research Centre, now merged into the Work and Equalities Institute, led by Jill Rubery, and Unfree Labour seminar network led by Nicola Phillips. I would also like to thank those who commented on draft chapters of this book, including Matthew Alford, Armando Barrientos, Lea Brockington, Neil Coe, Martin Hess, Rory Horner, Nick Jepson, Judith Krauss, Aarti Krishnan, Henrietta Lake, Khalid Nadvi, Dev Nathan, Eleni Sifaki, Margaret Visser, two anonymous referees and members of the Manchester GPN research group. A special thanks also to Roo Griffiths for her help with copy-editing drafts of my (often messy) writing. Finally, this book would never have come to fruition without the many discussions and long suffering patience of Armando, for whose support I am eternally grateful. I also want to thank the funding bodies that provided the main resources that supported my research over the years, particularly the Leverhulme Trust and UK Department for International Development (DFID).<sup>4</sup> All shortcomings and errors remain mine alone.

My work has also benefited from engagement with a number of practitioners (company and civil society) who have played key roles in driving change in global retail value chains. From companies these include Lakshmi Bhatia (previously at Gap), Giles Bolton (Tesco), Lea Brockington (Nike), Sara Clancy (previously

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<sup>4</sup> The Leverhulme Trust funded research on Fairtrade with Sally Smith (2004–5) and my Leverhulme Major Fellowship (2013–16), which provided time to write this book. DFID funded research on the South African fruit sector with Liz Orton and Sharon McClenaghan (1998–9) and on ethical trade in the African horticulture sector with Catherine Dolan and Anne Tallontire (2000–4). DFID was the main funder of the Capturing the Gains research programme (2009–12) with additional support from the Rory and Elizabeth Brooks Foundation. I alone am responsible for all research and views presented in this book.

at Body Shop), Paul Cluver (Paul Cluver Wines), David Croft (previously at Cadbury), Louise Nicholls (Marks & Spencer), Adil Rehman (Next then Asos), Fiona Sadler (Marks & Spencer), Anna Swaithe (previously at Cadbury), Sophi Tranchell (Devine Chocolate) and Alison Ward (Cadbury then Cotton Connect). From civil society these include Magali Barraja (BSR), Cindy Berman (ETI), Maggie Burns (ETI), Martha Chen (WIEGO), Fiona Gooch (Traidcraft), Angela Hale (Women Working Worldwide, sadly deceased), Jenny Holdcroft (IndustriAll), Rosey Hurst (Impactt), Neil Kearny (ITGLWF, sadly deceased), Sue Longley (International Union of Foodworkers), Peter McAllister (International Cocoa Initiative then ETI), Aurelio Parisotto (ILO), Dan Rees (ETI then ILO/IFC Better Work), Gerry Rogers (previously at ILO and initial driver of Capturing the Gains), Christine Svarer (Care then BSR), Alette van Leur (ILO) and Rachel Wilshaw (Oxfam). Also, more recently, my collaborators in the ETI gender assessment as well as Work and Opportunities for Women (WOW) programmes (particularly Charlotte Pallangyo). I also thank the many more practitioners whose engagement and debate over the years have helped my understanding of the complex issues and processes of change in global value chains.

As researchers, we are trained to be as rigorous and impartial as possible. My early experience of being ‘put right’ by a group of *temporeras* in Chile taught me the perils of assuming particular positions or outcomes. It is important to gather information from as many sources as possible, including commercial actors and all categories of workers and small-scale farmers, taking careful account of different perspectives. Views inevitably differ and sometimes conflict in value chains that incorporate multiple actors, many with competing interests, but the role of research is to understand and analyse diverse perspectives.

However, impartiality has never clouded one commitment—that my research will inform the attainment of a better life for all workers and small-scale farmers, particularly women and marginalized workers, who are so often overlooked but who represent the backbone of much global production. Research has taught me that, despite all the challenges paid work can present, access to jobs can also have an empowering effect for women, who have previously been largely excluded from labour markets or whose role is often overlooked in so many countries. Yet, although global retail value chains generate billions of dollars of revenue, the fact that many workers who produce the same goods are often barely able to capture sufficient gains to feed themselves and their families at a decent level of well-being needs to be redressed. The challenge for researchers is to critically assess both the opportunities and challenges and provide insights into how to leverage improvements.

Years of research indicates that positive change for workers can happen, but it does not come about automatically; rather, it results from a constant process of engagement, bargaining and contestation. Global value chains open up new spaces

for contestation that often transcend individual workplaces, sectors and countries, providing new opportunities to leverage change. My hope is that this book will inform all those researchers, policymakers, practitioners and activists working towards a better world for workers.

This book focuses on the changing gender patterns of work in a global retail environment associated with the rise of contemporary retail and global sourcing. This has affected the working lives of hundreds of millions of workers in high-, middle- and low-income countries. The growth of contemporary retail has been driven by the commercialized production of many goods previously produced unpaid by women within the home. Sourcing is now largely undertaken through global value chains in low- or middle-income economies, using a 'cheap' feminized labour force to produce low-price goods. As women have been drawn into the labour force, households are increasingly dependent on the purchase of food and consumer goods, blurring the boundaries between paid and unpaid work. This book examines how gendered patterns of work have changed and explores the extent to which global retail opens up new channels to leverage more gender-equitable gains in sourcing countries.

The book focuses only on work within global value chains, which have received insufficient attention in the literature from a gender perspective. It draws on research largely undertaken between 2000 and 2012, when the effects of e-commerce and automation were still at an early stage. It only touches on intra-household gender relations and does not examine wider issues beyond retail value chains, such as care work and informal and unpaid work. These are vitally important but have received more attention elsewhere in the literature (for example, McDowell 1999; Himmelweit 2000; Carr, Chen and Tate 2000; Chant 2011; Dunaway 2014). I realized in this book I needed to stay focused on specific knowledge gaps and could not cover all dimensions.

The research behind this book would not have been possible without the generous time provided over many years by workers, suppliers and civil society organizations in the many sourcing countries in which I have worked. I dedicate this book to all the workers I have interviewed, especially women, now in paid work producing for global retailers. In particular, I owe a debt to the Chilean fruit workers who first opened my eyes to the need to carefully examine both the global commercial changes taking place and the complex gender outcomes for workers. Despite many initiatives, the issues they faced then remain pertinent today. However, I remain optimistic that, if harnessed proactively, opportunities exist to improve the rights and conditions of all workers, contributing to the economic empowerment of women.



# Introduction

## Rise of Global Retail

The rise of global retail has transformed the production, distribution and sale of food and consumer goods with significant consequences for the gender profile of work in the Global South. Global retailers play a key role in the provision and global sourcing of a wide range of consumer goods across national borders through global value chains (Coe and Wrigley 2009; Hamilton, Petrovic and Senauer 2011). Global value chains are summed up as ‘the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use’ (Kaplinsky and Morris 2002, 8). Well established in North America and Europe, global retail is rapidly becoming more prevalent in emerging and lower-income economies (Reardon et al. 2003).

Women are drawn into global value chains as farmers, wage-workers, employees, buyers and customers (Dolan and Sorby 2003; Hale and Wills 2005). As retailers expand their market scope, they are commercializing many unpaid activities previously undertaken by women within households. Global retail and sourcing generate paid work for hundreds of millions of workers in emerging and low-income countries, drawing in a significant proportion of women with limited previous labour market access (ILO 2015b). Often they are involved in producing goods women had made or prepared in the home. Retail value chains link firms at each stage from production through distribution to final retail and final consumers (Kaplinsky and Morris 2002). A key argument of this book is that their growth has been based on commercialization of many activities previously undertaken, unpaid, by women in the home, helping to draw women into fragmented paid work in their production. They therefore blur traditional gendered boundaries between paid work in commercial production and unpaid work within households.

These processes play out differently across geographical locations, where gender norms shaping the division of labour and women’s participation in productive and reproductive activities can vary greatly. Often, retail can disrupt long-established

gender norms, but the outcomes for promoting gender equality appear mixed both across sectors and locations. Women workers are largely concentrated in low-wage, labour-intensive production. Their jobs are often flexible and insecure and part of a 'low road' linked to economic and social downgrading. However, some women workers benefit from better remuneration and conditions, particularly where their skills are recognized. They are part of a 'high road' linked to economic and social upgrading (Barrientos et al. 2011). Value chain participation can recreate gendered subordination in the commercial sphere (Dunaway 2014). It can also provide new channels for women's bargaining and contestation aimed at improving their rights and conditions of work (Oxfam 2004; Barrientos 2013a). This has important implications for strategies directed at promoting social upgrading and gender equality within contemporary global development.

There has been limited academic analysis of the transformations of gendered patterns of work in value chains. Complementary analytical frameworks of Global Value Chain (GVC) and Global Production Network (GPN) analyses are drawn on in this book. GVC analysis focuses on interfirm relations (Gereffi et al. 2001), while GPN analysis places more emphasis on power and embeddedness of global production (Henderson et al. 2002).<sup>1</sup> These provide insights into the commercial dynamics of retail sourcing. However, they pay limited attention to work and, with a few notable exceptions, largely overlook the gender implications. Feminist political economy provides important insights into the changing gender dynamics of work in global production (for example, Elson and Pearson 1981; Pyle 1999; Kabeer 2000; Beneria, Berik and Floro 2003). This examines the relation between production for markets (through paid work traditionally undertaken by men), and social reproduction of current and future generations (largely undertaken by women within households) (Folbre 1994; Hoskyns and Rai 2007). Until recently, with some exceptions, feminist political economy largely overlooked the role of global value chains.

This book addresses a critical knowledge gap. It is estimated that 55–80 per cent of world trade now passes through global value chains (OECD, WTO and UNCTAD 2013; UNCTAD 2013). Global value chains generate over 453 million jobs (42 per cent female) in 40 countries that are members of the Organisation for Economic Co-operation and Development (OECD) and emerging economies (ILO 2015a). This figure does not take into account low-income developing countries, where a large amount of labour-intensive global sourcing is located.

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<sup>1</sup> When referring to Global Value Chain (GVC) and Global Production Network (GPN) as analytical frameworks I use capital letters, in contrast to when I make empirical reference to the retail value chains as the channels through which retailers coordinate their supply, where I use lower case.

Retail value chains play a significant role in this, globally and regionally, through expansion across the Global North and South.

The book is guided by the core questions: How are global retail value chains shaping gender patterns of work, and what are the gendered outcomes for workers? To examine these questions, I draw on a combination of analytical approaches, including GVC and GPN analyses, feminist political economy, and labour and development studies.

I advance the theory of gendered Global (re)Production Networks (G[r]PN) to explore how global retail value chains are reshaping the gender profile of work, especially in middle- and low-income countries. A G(r)PN approach emphasizes the gender embeddedness of global production supplying household and consumer goods (Kelly 2009). It examines articulations between the economic sphere of commercial production and the societal sphere of social reproduction. It explores how replacing many goods traditionally produced unpaid by women within households by commercially produced goods involving a large fragmented workforce is blurring the division between paid and unpaid work. It unpacks embedded tensions and contestation that can lead to different outcomes across value chains and locations. This approach provides new insights, I will argue, into diverse gendered processes of economic and social upgrading and downgrading within value chains that can lead to different outcomes for workers.

This analysis provides a unifying framework for examining a number of comparative case studies on a selection of consumer products. These products include apparel<sup>2</sup> and agri-food (flowers, fruit, vegetables and cocoa) sourced from different countries including Bangladesh, Ghana, India, Indonesia, Kenya, South Africa and the UK. These case studies are based on research that I have undertaken through different projects over many years. I have supplemented them by drawing on secondary information and other research studies undertaken in related countries and value chains. Combined, this work throws light on the changing context of retail and gendered outcomes for workers within diverse value chains and low-income economies. It provides comparative examples of the changing nature of women's participation in value chains (as wage labour, home-based workers and smallholder producers), and the shifting boundaries between productive and reproductive work.

This book unpacks interaction between the economic sphere of commercial production and the societal sphere of social reproduction in a value chain context. It argues that there are inherent tensions between a commercial dynamic of efficiency and profit in markets versus a social dynamic of caring and well-being.

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<sup>2</sup> 'Apparel' is the US term, also called 'garments' or 'clothing' in other countries.

In retail value chains, linkages between consumers, buyers and producers are intensified in comparison to arms-length markets where they are more remote from each other. As commercial retailers have become more embedded in the localities within which they sell and source, they have responded to pressure to display greater concern for environmental and social dimensions of production. They need to not only sell at competitive prices but also deliver on a range of ‘quality’ dimensions. This underpins the retail mantra that suppliers meet requirements on cost and speed of delivery and also comply with quality requirements that include environmental and social standards (Barrientos and Dolan 2006).

Suppliers juggle cost, speed and quality through the use of a fragmented workforce. Regular, more skilled workers help to deliver quality and consistency, and fragmented, flexible and subcontracted workers help to deliver on low-cost and quick response to orders (Barrientos and Kritzingner 2004). Regular workers can experience benefits, while fragmented workers face poor conditions and often labour abuse—even within the same factories and farms. Engagement in retail value chains can also open up new channels of contestation. Reputational risk to retailers from adverse campaigns provides leverage for civil society organizations such as unions and nongovernmental organizations (NGOs) (for example, Oxfam 2004). Women’s entry into paid work can enhance their bargaining position at home and work, enabling participation in collective action and contestation.

For women, shifting the boundaries between the economic sphere encompassing commercial production (paid work) and the societal sphere encompassing social reproduction (unpaid work) has far-reaching implications. The entrenched social subordination of women is reflected in the fact that their work has long been undervalued. Gendered patterns of work in global value chains often relegate women to providing a cheap labour force using socially acquired skills that are insufficiently recognized or remunerated. Yet, when some suppliers pursue economic upgrading by moving to higher-value activities, increasing their demand for skilled workers, it also enhances bargaining and contestation by women workers, which can lead to improved working conditions and remuneration. However, I argue that gender-equitable outcomes that enhance workers’ rights and women’s economic empowerment are far from inevitable but require strategic interventions involving private, public and civil society actors. Addressing systemic gender discrimination also requires a shift in the commercial model from one that privileges profit and share value over caring and well-being. A core argument of this book is that capturing more gender-equitable gains for workers will not be automatic, but involves a constant process of bargaining and contestation.

In this introduction, I expand further on this perspective, which subsequent chapters then develop in more depth. In the second section, I examine the empirical context in order to highlight the rapid changes in gender patterns of work associated