

Gender and the Future of Work in Thailand

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Foreword

Despite economic growth and declining poverty levels across Asia, inequality continues to grow, with large groups of society remaining marginalized in economic and social terms.

Women in Asia continue to experience massive structural disadvantages, from early childhood education through their retirement from work – if they wanted and were allowed to work – and into their older age. It is mainly women who are exploited as cheap labour in Asia's export industries and low-skill sectors, especially agriculture, textiles and the footwear and electronic industries. They are paid subsistence wages and experience increasing precariousness of their working as well as living conditions.

On the heels of all the economic progress now comes rapid technological transformation that is altering the present and future nature of work in ways that offer a multitude of opportunities but also add new levels of risks for social groups across the Global South.

Women are particularly vulnerable and disproportionately affected by these changes, both in the context of the Fourth Industrial Revolution and in the ever-expanding care work across the formal and informal sectors.

Unfortunately, the predicted productivity gains through automation and digitalization in many sectors possibly will not give women much hope for fundamental improvements of their prospects. Due to their poor access to education, skills development and professional know-how, Asia's women are at risk of slipping deeper into unemployment or resorting to migration far from their home for jobs they can manage.

The goal for them and for us in development cooperation work is to find socially just and gender-equal responses to

these challenges. Solidarity and coalitions across a range of progressive movements in Asia are essential.

Through our regional networks, Friedrich-Ebert-Stiftung (FES) brings together diverse voices from social movements, civil society organizations, trade unions, political parties and academia to work together in developing progressive ideas and narratives for advancing social justice. Among the most innovative platforms is the newly established FES Asia project Women's Perspectives on the Future of Work. With insights from distinguished researchers in nine Asian countries, FES and its partners aim to further promote gender equality in the world of work, with emphasis on enhancing women's participation in public and political life and promoting decent work for all along with gender-just and human-centric economic models.

In Thailand too, the world of work is changing fast. Issues of technological innovation, green growth, ageing society, migrant labor and policy responses, like the "20 Years National Strategy and the Thailand 4.0 strategy" are widely debated. FES contributes to the public discourse with research and policy recommendations. Our thanks for this paper go to Dr. Romyen Kosaikanont, lecturer and gender expert at the School of Management, Mae Fah Luang University. Her analysis enables us to understand better the concerns of Thailand's women and highlights possible interventions. We hope that this paper contributes to a fruitful discussion and provides valuable insights for future initiatives.

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Introduction

Since Thailand's first economic development plan, launched in the 1950s, the country has undergone three stages of economic structural transformation: from Thailand 1.0 and agriculture-based development to Thailand 2.0 and light industry to Thailand 3.0 and heavy industry-based development. In 2018, the government announced a 20 Years National Strategy and the Thailand 4.0 strategy, to be implemented as a development model. While the 20 Years National Strategy is a long-term development plan, the Thailand 4.0 strategy is more of a driving vehicle to achieve the long-term goal of development. These strategies focus on production with high value-based innovation, digitalization and automation, aiming to move the country out of the middle-income trap with a more balanced and equal society.

The country's economic structure has changed from being heavily dependent on agriculture to greater reliance on the non-agriculture sector, especially manufacturing and services. The agriculture sector absorbed more than 70 per cent of the labour force in the 1950s, but that share had drastically declined to a little more than 30 per cent by the late 1980s.¹ In the same period, labour force participation in the manufacturing industry increased. Peter Bell's research on the industrialization process during Thailand 2.0 highlighted that the economic miracle of the early 1990s was built on the feminization of labour.²

The top 10 export industries in value were produced by female labour,³ including textiles, garments, footwear and electronics. These four industries generate the largest contributions to the country's gross domestic product value and contain the largest concentration of female labour. In addition, the heavily promoted tourism industry and retail services are also dependent on female workers. This pool of female labour derives mostly from the poorer provinces of the North and the North-East. The women migrate to find work in the industrial estates outside of Bangkok or in the service industry within the capital and other big cities.

To create an attractive environment for foreign direct investment, the government forbid labour unionization in the industrial estates. That means the industrialization policy not only created new urbanization and deepened

the urban-rural divide but it left female workers with limited bargaining power.

The labour structure following the financial and economic crises that began in 1997, or during Thailand 3.0, experienced another shift. Many light industries and much foreign direct investment were adjusted to save costs by subcontracting orders to female informal workers on a piecemeal basis. This shift left an increasing number of informal or home-based workers with no welfare provision, limited or no legal protection, no bargaining power, no skill development opportunities and at risk of occupational hazards.⁴ Structurally, women engaged in the light industry were made highly vulnerable.

During the early 1990s, Thailand developed greater connectivity with the region following the opening up of the four neighbouring countries: Cambodia, the Lao People's Democratic Republic, Myanmar and Viet Nam. Due to the differences in national development levels, the influx of migrant workers from those four countries filled the jobs that Thai workers did not want to perform—jobs considered dirty, dangerous and demeaning. The International Labour Organization's (ILO) *Thailand Migration Report 2019* notes that nearly 3.8 million migrants from the four neighbouring countries are working in Thailand.⁵ The report also points out a gender pattern in migration and the sectors where migrants work: Men are mostly hired for strenuous work, such as in fisheries, and women mostly engage in work-intensive industries, such as the seafood and agri-processing industry. In addition, migrant women workers also become informal sector domestic workers and caretakers for older persons.

In 2013, the government announced a 300-baht minimum wage policy, indicating an increase of the daily wage by more than 100 baht. This prompted many labour-intensive enterprises, such as in footwear and textile manufacturing, to relocate to neighbouring Cambodia and Myanmar.⁶

According to the National Statistical Office, the labour force in February 2018 consisted of 56.3 million people aged 15 years and older, of which 37.9 million were in employment, with female labour participation slightly less than male labour. Unemployment is extremely low,

at around 490,000 people only. Around 67.8 per cent of the labour force are in non-agriculture sectors, leaving 32.2 per cent in agriculture.⁷

The National Statistical Office reported in 2015 (latest available data) that women workers were concentrated in five areas: services and retail (at 4.4 million); skilled labour in agriculture, forestry and fisheries (at 4.1 million); basic workers (at 2.3 million); professional (at 1.3 million); and skilled labourers (at 1.3 million).⁸

As for the gender wage gap, research by Nakavachara found that difference between the wages of men and women had grown smaller, from 34 per cent in 1985 to 9 per cent in 2005, because of the increase in female education.⁹ Khorpeth and Kulkolkarn found that although women are more productive, they receive lower wages because of gender biases. They also found that gender discrimination is strong among women of young and middle ages.¹⁰

According to the ILO, more than 4.8 million migrant workers (including 3.8 million from its four neighbouring

countries) represent 10 per cent of the labour force. With Thailand's demographic change and the projection that in 2025,¹¹ more than 20 per cent of the population will be older than 60 years, the situation will deteriorate, with a larger proportion of the ageing population. This means a shortage of labour for the Thai economy may generate higher demand for labour, especially in the care economy.¹² The report also noted that a small number of highly skilled labourers migrated to Thailand in recent years, after a surge in foreign direct investment.

On the other hand, with an ageing society approaching, it is expected that more older persons will need social welfare and care provisions.

In short, the labour structure in Thailand at present is characterized by nearly full employment while facing a shortage of labour. Although the labour force participation gap between men and women is not significant, there is gender segregation by employment sectors, with a gender wage gap. The shortage of labour is currently being filled by migrant workers from neighbouring countries.

Narratives around the future of work

The future of work in Thailand can be understood in the framework of three main factors (i) the government policy of the 20 Years National Strategy and Thailand 4.0; (ii) the mega infrastructure investment by the government, aiming to facilitate and attract foreign direct investment; and (iii) the ageing society and the needs for care.

The 20 Years National Strategy and Thailand 4.0

The government developed the 20 Years National Strategy in response to the multiple challenges of (i) the middle-income trap with imbalanced development and inequality, (ii) the ageing society as well as (iii) the shortage of labour. The objective is to achieve “stability, prosperity and sustainability.”¹³

To drive the vision of the 20 Years National Strategy, the government adopted Thailand 4.0, which promotes 10 priority industries. The first five entail the previously competitive industries, called the “S-curve”: automotive, electronics, tourism, agriculture and food. These industries will be transformed into: next-generation automotive; smart electronics; affluent, medical and wellness tourism; agriculture and biotechnology; and food for the future. The five new industries to receive support, called the “new S-curve”, are robotics, aviation and logistics, biofuels and biochemical, medical hub and the digital industry. All 10 industries need to integrate innovation and are a cluster for start-up businesses, aiming for high value production. In short, Thailand is shifting towards innovation, digitalization and automation.

It is obvious that four of the five “old” competitive industries (electronics, tourism, agriculture and food) are highly feminized industries, with high risk of their workers being replaced by automation and digitalization—unless they can up-skill or re-skill. The issue of who is responsible for labour development in terms of up-skilling and re-skilling is an ongoing debate. The Ministry of Labour had been commissioned to prepare a strategic plan for labour development in support of Thailand 4.0, but it is not clear how the skill development plan will be carried out.¹⁴

On the business level, only a small number of companies has a plan for human resource development. This

actually means that companies can implement their own policy, which are greatly diverse. For instance, Star Microelectronics, which employs more than 1,300 workers, announced its policy of retaining all workers even while integrating automation into its production processes. The company managed to keep employees by expanding its line of production, with extra training provided.¹⁵ Not all companies, however, prioritize employees this way.

Recent studies by the Thailand Research Development Institute (TDRI) warn against a shortage of skilled labour in the five new industries (robotics, aviation and logistics, biofuels and biochemical, medical hub and the digital industry).¹⁶ Although TDRI did not analyse the needs using a gender lens, the science and technology-related labour force of nearly 4 million workers is known for a high concentration of men, at around 71 per cent.¹⁷ Additionally, the government has heavily promoted start-up businesses in this sector by providing funding and tax incentives. The majority of those start-up businesses is owned by men. Only a few women-headed technological start-ups have been successful. According to Shanon Kanlayanamitra, a female tech start-up owner, and UN Women HeforShe advocates, the start-up business in Thailand is a “boys’ club”.¹⁸

In sum, Thailand 4.0 creates a scenario for the future of work that will be beneficial to workers who can adjust quickly or acquire the skills necessary to operate the production process in the disruptive technological businesses. However, the prospect for workers in the production line is unclear and dependent on the policy of companies and support for training from the government.

Mega infrastructure investment project

The government is well aware of the need to attract foreign direct investment to boost innovative, automated and digitalized production for economic growth. Hence, the government plans to invest in a mega infrastructural project in Thailand’s Eastern Seaboard area (covering 13,285 square kilometres) and convert it into the Eastern Economic Corridor. This area will be designed as the

region's centre of trade, investment and offices of the world's top companies.

Apart from offering great incentives through the Board of Investment, both in tax and non-tax privileges, huge infrastructure investment, especially in transportation, has been launched. This includes four primary projects: (i) high-speed train; (ii) double-track rail lines connecting industrial zones across the country to the main deep-sea ports; (iii) expansion of the motorway connecting Bangkok with the Eastern Economic Corridor;¹⁹ and (iv) expansion of the U-Tapao airport into an "aviation city".²⁰

The mega infrastructure project will shape the future of work: It will require a large pool of labour, at least for the next decade, for construction, operation, maintenance and related businesses. Due to the limited knowledge, technology and capacity of Thai companies, foreign companies and state-owned enterprises from Japan and China have already bid to construct the high-speed train and related services. Their bid comes with the condition that the engineers and technicians must be from their countries because of their expertise. For the actual construction, the job opportunities may be opened to Thais. But because construction is male dominated, the benefits may be enjoyed largely by men. In the longer term, the maintenance and operation of the high-speed train will be defined on the ability of labour to learn this technology. However, if the project is carried out with gender equality in mind, women can also reap benefits from the new job opportunities.

Ageing society and the need for care work

The population in Thailand in 2017 was an estimated 69 million, with a trend to decline. Thailand is an ageing society with a low population growth rate of 0.2 per cent per annum.²¹ Among the South-East Asian countries, it has the second-lowest fertility rate, at 1.5 children per woman. An ageing society means that the proportion of older persons (people aged 60 years and older) is growing. In 2017, the older persons population accounted for 16 per cent of the country's total population, but the United Nations estimates it will increase to more than 35 per cent by 2050.²²

The demographic shift and ageing society can be translated into three scenarios for the future of work in Thailand: First, the labour shortage will continue, especially among the so-called dirty, dangerous and demeaning jobs that Thai people do not desire to do. Second, older persons will live longer and need to be cared for. Third, jobs may also be needed for healthy older persons.

In a recent report, the ILO forecasts that the demand for migrant labour will continue to increase, especially from the neighbouring countries, to fill the labour gap in the undesired work and in the care economy.²³ This can be considered an opportunity for migrants and simultaneously a concern because migrant labour may be vulnerable if they are undocumented, deceived or trafficked. Female workers are particularly at risk of being sexually exploited or harassed. Hence, the government must commit to ensuring the safety and decent work for all migrants through effective law enforcement and other measures.

Feminist perspective on the future of work

Thailand 4.0 is an attempt by the government to restructure the economy. Such restructuring will inevitably create positive and negative impacts on different social groups. That the government has only consulted with businesses but not with labour or the general public regarding Thailand 4.0 can be considered as structurally biased towards the capitalists and investors. Because vulnerable social groups, especially people with limited bargaining power and including people with less secure contracts, female Thai workers and female migrant workers, are not part of any union, their views have not been integrated into any decision-making and planning. There is thus high risk that their rights will be violated.

To pursue the Thailand 4.0 policy, companies and labour need to adjust to the new mode of production. For companies, there is a need to invest in new technology, and this requires large capital and knowledge. So far, only big companies, such as Toyota, Stars Microelectronics, banks and agribusinesses, can catch up with the trend.

But workers need to invest their time to understand the policy before they can decide how to construct their livelihoods and protect themselves if the government is not going to provide enough support. Middle-aged low- or semi-skilled workers in the car manufacturing sector have voiced their concerns over how they would adjust to the new mode of production; they are holding the government to account for the consequences of its policies.²⁴ The situation is projected to be much worse for female middle-aged workers.

A 2002 report on gender equality and decent work in Thailand pointed out that, although female participation in the labour market has always been high, there are gendered patterns in certain industries.²⁵ Manufacturing, commerce, services, banking and finances have high female participation in relation to male workers, while construction, transportation and communication are highly male dominated. This is due to the cultural values attached to these industries as being male or female.

Although the latest available data are the relatively old (2015), the government statistics indicate similar patterns of high female participation in service and retail sectors and skilled labour in agriculture, forestry and fishery.²⁶

Because the impact of the shift in the economic structure following Thailand 4.0 is a prognosis, the gender analysis of the future of work is projected based on the gender segmentation of the current labour market.

For the next two decades, the ILO estimates, jobs and enterprises in Thailand will be inevitably affected by automation and robotics. The ILO also estimates that 44 per cent of employment, or more than 17 million jobs, are at risk of being replaced by automation.²⁷ Because women, especially migrant workers, are concentrated in low-skill or semi-skill and manual work in the labour-intensive electronics and food industries, for example, they are more likely to lose their jobs to automation. And most likely, the new S-curve industry will be male dominated unless interventions are made in favour of women.

The following highlights three businesses in Thailand that have adopted new technologies (in automotive manufacturing, agribusiness and banking). First, the Chareon Pokphand (CP) Group, an agribusiness with a large female workforce, automated its production line. As a consequence, the number of workers reduced to only seven people operating the plant for 24 hours. It is not known how the company managed the excess labour—mostly women—following the automation. According to the media, the workers of CP Group are composed of both Thai and migrant workers. Lingering questions are how the workers have been supported to minimize the impact from automation substitution and what livelihoods have they found under the new mode of production?

The second example is Toyota Thailand. The company asked 800 of its short-term contract employees, who are mostly men working in the production line, to leave their job with pay but at short notice. Although they were compensated according to the Thai labour law, it is evident that labour has limited bargaining power because they were not secure in terms of the permanent contract and they were designated the first to be cut. The case of Toyota Thailand reflects how companies exploit a loophole in the Thai labour law. Instead of issuing a permanent contract to the workers (which each company is obligated by law to do), the workers were offered short-

term contracts, giving them a status similar to probation, so that they can be easily laid off, for instance, in case robots are introduced.

The third example is that of a banking business. In 2017, the Central Bank of Thailand announced a policy for commercial banks to close down a proportion of branches. The policy was implemented in response to customer behaviour in the digital era. By 2018, 327 commercial bank branches had closed. Such closings impacted bank employees. Because the management of each bank is determined by each bank's policy, each bank approached the employee impact differently. For example, the plan of Siam Commercial Bank to reduce its branches from 1,153 to 400 by 2020 will mean a reduction of 27,000 employees to 15,000. It has not yet elaborated how it will deal with the employees slated to lose their jobs.²⁸

Krung Thai Bank also plans to close down some of its branches but has announced a clear policy for not laying off its employees. It has opted not to recruit a new workforce, and all Krung Thai Bank employees from the closed branches are to be transferred to the headquarters or other units.²⁹ An analyst with the bank explained that there is a gender division of labour pattern in banking in some units. Thus, because a large number of female workers are concentrated in the branches (in sales, relationship management and the accounting departments), closing down branches would disproportionately affect female bank employees.

In terms of the impact of Thailand 4.0 on the gender wage gap, it is too early to conclude. Although the government announced a policy of 300-baht minimum wage in 2013³⁰ for workers and 15,000 baht per month for employees with a bachelor's degree, the wage gaps for the same job still exist, with women earning 9 per cent less than men over the past 20 years.

It is difficult to forecast if the wage gaps would worsen if female and vulnerable migrant workers could bargain for lower wages to secure their work. It is commonly perceived that automation would replace the most repetitive jobs, such as textile and footwear factory workers. After enforcement of the 300-baht minimum wage in 2013, as

noted previously, textile and shoe factories moved their base to a neighbouring country, where wages were four to eight times cheaper. The Thailand Industrial Council reported that, in total, 60 textile factories relocated to Cambodia and Myanmar.³¹ However, if Thai foreign direct investment in the neighbouring countries decides to integrate automation in their production, the job security of the female workers in those countries will become at risk of replacement.

The government policy of Thailand 4.0 and its measures are supposed to benefit foreign investors or start-ups that are technologically ready. Yet, female tech start-up businesses in Thailand are reportedly few, at only 6.7 per cent.

Two Thai women who started businesses told a reporter in 2015 that, being female in the start-up environment, they have to fight multiple biases: They are often challenged in business meetings with or by their colleagues in the management team because businesswomen in the tech industry are not commonly found and trusted.³²

TDRI estimated that the number of digital or ICT-related employees in 2017 was 268,065 people, with an annual increase of 6 per cent.³³ The government now emphasizes development of new talent and graduates, to equip them with digitalized skills that are responsive to industrial needs. Although Thai and migrant men also face risk of job loss due to Thailand 4.0, they have greater access to new job opportunities, such as in the construction sector for the mega infrastructure investment project.

There appears to be no measures to address gender segregation and education and training in the labour market. Without directly responding to the gender issues, it is likely that the newly promoted priority industries will not benefit women in jobs at risk of being automated. And women workers, especially in electronics, agriculture, the food industry and tourism, are likely to be by-passed by any positive impact of Thailand 4.0. Because the new mode of production requires knowledge and skills in new technologies, digitalization and automation, it will add to the problems for middle-aged female workers who are not involved in the digitalized economy.

Future research priorities related to the future of work that can help address patriarchal and social inequality

In Thailand, research on the future of work has centred largely on how to produce the needed talent for the success of Thailand 4.0. That research has been structurally gender blind and does not address the gender imbalance in the digitalized labour market or in education. To make a meaningful contribution, the research on the future of work should carefully examine how to make successful policies. And it should explore how to create a societal environment with better well-being and sustainable livelihoods with equality for all workers. Recommended research priorities should thus be:

- 1/ Empirical study of the causal links of the gender impact of Thailand 4.0 on the future of work.
- 2/ Policy analysis and recommendations on how to minimize the negative and disproportionate impacts of Thailand 4.0 on female workers.
- 3/ How the care economy can be revalued and promoted and how female care workers can be empowered.
- 4/ How the female ageing population can contribute to the future of work while being ensured the right to quality living conditions.

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