



**Asia-Pacific
Economic Cooperation**

Advancing Free Trade
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APEC Capacity Building Workshop on Restructuring Women-Led SMEs in Textile and Garment Industry in the New Era

APEC Policy Partnership on Women and the Economy

April 2022



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Ha Noi, Viet Nam | 11 – 12 January 2022

APEC Policy Partnership on Women and the Economy

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APEC Project: PPWE 01 2019A

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APEC#222-PP-04.4

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**APEC CAPACITY BUILDING WORKSHOP ON
RESTRUCTURING WOMEN-LED SMES
IN TEXTILE AND GARMENT INDUSTRY IN THE NEW ERA**

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Summary Report

I. Introduction

On 11 and 12 January 2022, the “APEC Capacity Building Workshop on Restructuring Women-led SMEs in the Textile and Garment Industry (T&G) in the New Era”, initiated by Viet Nam and co-sponsored by Japan; Korea; Mexico; Russia; the Philippines; and Chinese Taipei was held both physically in Ha Noi, Viet Nam for local participants and virtually for foreign speakers and participants due to the COVID 19 impacts. Speakers and participants came from private sector, business associations, international organizations, research institutions and APEC member economies’ relevant Ministries and government’s agencies.

The “APEC Capacity Building on Restructuring Women led MSMEs in T&G Industry in the New Era” aims to support women-led SMEs in restructuring as well as to upgrade themselves with relevant knowledge, expertise, and skills to adapt to and harness the opportunities that the digital era brings about. In this light, the project aims at the following:

- Identifying opportunities and challenges that face women-led SMEs in the textile industry in the digital age and 4.0 revolution.
- Sharing experiences, best practices in restructuring women-led SMEs in textile and garment industry including through promoting business linkages in the textile industry in various aspects such as legal frameworks (policies, regulations, incentives, ...), stakeholders’ roles (governments, business associations, local authorities,...).

- Sharing experiences, best practices in enhancing women-led MSMEs' capability and competitiveness in the era of digital age and 4.0 revolution (including but not to limited, innovation, management, governance, finance, technology transfer, etc.,).
- Making recommendations if applicable.

II. Background

It is believed that the digital age and 4.0 industrial revolution are integral factors that shape the current world and having unprecedented impacts on all people and sectors across the economy. T&G industry is one of those that are most affected by the digital age and 4.0 industrial revolution given the fact that the industry is labour extensive. Women are those who will run the risks of being phased out of the labour force in the industry since they account for a majority in the labour force. It is estimated that about 60 million to 75 million people are employed in the textile, clothing, and footwear sector worldwide, three of quarter of whom are female¹. According to a recent United Nations' report, the limits on women's participation in the workforce across the Asia-Pacific region cost the economy an estimated USD 89 billion every year².

Although the Digital Age and the 4th industrial revolution (4.0 revolution) are believed to bring about a great deal of opportunities for inclusive growth, it also entails a lot of challenges and difficulties for labor-intensive industrial sectors like T&G. Workforce transformation and restructuring are necessary and might be inevitably painful for labor force in general, women in the industry in particular as a result of the 4.0 revolution's dramatic technology transformation. In addition, economies especially developing ones would face risks of low labor productivity, low values in global value chain (GVC) in T&G, low wage, or job loss (if ask for wage increase), inequality, poor working conditions, child labor, etc., due to limited capability in various aspects, namely a few: innovation, competitiveness, technology, finance, management, etc.,) to benefit from the Digital Age and 4.0 revolution.

Given women's great contribution to sustainable and inclusive regional economic growth; this project joins APEC's efforts in promoting women economic empowerment in general, in the T&G industry in particular, with aims to providing capacity building, sharing experiences and practices in restructuring and upgrading women-led MSMEs in T&G industry to assure their advantages as well as efficient participation in the T&G GVC in the new era, with a focus on how to improve the awareness, as well as facilitate the implementation of business linkages in textile industries for MSMEs, and women-led SMEs in particular.

¹ Celia Mather 'Garment Industry Supply Chains' (Women Working Worldwide) http://www.womenww.org/documents/www_education_pack.pdf accessed 16 January 2015; and <http://www.ilo.org/global/industriesand-sectors/textiles-clothing-leather-footwear/lang--ja/index.htm> accessed 16 January 2015

² UN Women. Data on Women. <https://asiapacific.unwomen.org/en/countries/india/data-on-women#:~:text=More%20than%2080%20percent%20of,the%20protection%20of%20labour%20laws.&text=Limits%20on%20women's%20participation%20in,US%2489%20billion%20every%20year.>

This project is aligned with the 2017 Leaders' Statement when the APEC Leaders affirmed *"We place importance on the need to prepare our people and all workers, especially vulnerable groups, for the changing world of work. We endorse the APEC Framework on Human Resources Development in the Digital Age (Annex B). We are committed to strengthening human resources development, including through education and life-long learning, technical and vocational education and training (TVET), and up- and re-skilling to increase workers' employability, mobility and preparedness for the digital age; and ensure that active labour market policies can better match the needs of the labour market with various aspects of skills training and development."* It indicates APEC's priority in ensuring inclusive growth through improving human resources in general and women in particular in the Digital Age.

It is aligned with the APEC 2018's priority of promoting sustainable and inclusive growth by looking at related issues of "Gender Inclusion and Women's Economic Empowerment".

It contributes to the APEC Internet and Digital Economy Roadmap's by enhancing inclusiveness of Internet and Digital Economy, which aims to "gain inclusiveness through capacity building to ensure no one is left behind in the Digital Age".

It is in line with PPWE's 2017 work plan that (i) promote gender equality for inclusive economic growth; (ii) Enhance the competitiveness and innovation of women-owned MSMEs; and (iii) Narrow the gender gap in human resources development. By focusing on women involved in the industry (owners, managers, labourers), it will help improve women led MSMEs' capability and competitiveness in the industry, hence, contribute to inclusive economic growth.

III. Key Issues

1. An overview of women-led SMEs in the textile and garment industry

Global Garment Industry Perspectives and Role of Women presented by Dinh Thi Bao Linh, Deputy Director of Information Center, Ministry of Industry and Trade (MOIT) of Viet Nam.

Even though heavily affected by the covid pandemic, the prospect for development of the global garment industry is still bright with steady and gradual growth in value from 1.46 trillion U.S. dollars in 2020 to 2.25 trillion U.S. dollars in 2025, according to Ibisworld report. In the global garment industry, 04 main trends are noticeable, they are:

- The increasing role of digitalization in production and distribution channels: Digitalization in the fashion industry was already a top trend prior to the pandemic. However, the rise of digital channels is expected to become a permanent shift going forward due to the impact of the pandemic.
- The importance of sustainability and social justice: More consumers are concerned about the future of the planet and are putting heavier pressure on fashion brands that do not have eco-friendly practices. Some companies are working to modify their business models and develop products made with more sustainable materials. For example, Adidas collects plastic wastes in coastal areas, recycles them into polyester and uses recycled material in shoes and clothing. Beside concerns over climate change and planet health, consumers are also more aware of exploitative working conditions in factories and are increasingly demanding better living wages and safe working conditions.
- Development of niche markets in Athleisure wears: There is a rapid growth in athleisure wears as consumers have started to swap business casual and professional attire for more comfortable athleisure wears such as yoga pants and T-shirts. According to a recent report by Technavio, it is expected that the global athleisure market will grow by 153.02 billion U.S. dollars during the period from 2021-2025, increasing at an annual growth rate of more than 7 percent.
- A shift toward size-inclusive fashion: Size-inclusive initiatives have become more widespread. However, most luxury brands have not made similar moves to normalize double-digit sizing.

Being a labour-intensive industry, human resources have a significant contribution to the textile and garment industry. Out of the workforce, 80% are women. The industry has

created jobs and incomes for women, however, women in the industry still face certain difficulties and inequality in terms of payment, discrimination, violence and harassment, balancing between work and family responsibilities and leadership and representation in industry decision-making (ILO 2021).

In the short-term with the effect of the pandemic, businesses should focus on retrenchment and closure practices as well as address women's disproportionately unpaid care obligations, support women workers to overcome difficulties of the pandemic so that they can return to work as factories resume operations. In the long-term, there should be more efforts to combat violence and harassment in the workplace to improve working conditions, enhancing women's living standard in the long term. Besides, women's voice, representation, leadership, and decision-making should be seen as an important key to ensure a full and fair recovery from the pandemic given the women's contribution to the economy in general, in the labour-intensive T&G industry in particular.

2. Organizational and financial issues facing women-led SMEs in the textile and garment industry in the digital era

Presentation by Ms. Ngoc Hoan, Director, My Duc Embroidery Company, Viet Nam.

Ms Ngoc Hoan presents her experiences as the founder and director of My Duc Embroidery Limited Company (My Duc) since its inception in 1992. My Duc is a local small and medium enterprise (SME), which was initially rooted from a household business in the northern part of Viet Nam with the views of creating jobs and income for her own family. In her 30-year experiences full of hardship and development, it is essential that the enterprise should maintain the momentum for growth and development given the increasingly harsh competition in the industry and market. From a household business, she developed her business into a cooperative in 1994 and a joint stock company in 2004. Her business expansion is based on her quest for and harness of technology transfer and the 4.0 revolution. In the 1990s, she soon realized that her simple handicapped products would be difficult to compete well with other imported and well-designed products of the same kinds. Despite many difficulties such as limits in capital, lack of high-level and skilled human resources, since then, she has quested for technology transfer and imported relevant machines from Japan and Korea to apply in her factories, which has helped her company to have greater access to markets such as Japan and Korea. The company has also started to harness digitalization, which she has proactively applied any possible and available approaches to help her business operate more efficiently such as synchronizing and digitalizing all the company's data, installing softwares or tools in

managing customs, transporting, shipping, or using digital platforms to access to customers. In the rise of the COVID 19 pandemic, her business is in great hardship due to the disruption in the supply chain, lack of the workforce as a result of prolonged lockdowns. She believes that despite challenges, business would embrace opportunities in the economic recovery following the COVID 19 if the Government had timely policies and incentives to support business community, especially SMEs in the T&G industry since the industry would be able to create millions of jobs for the economy. Those policies should include supports in easier access to loans, tax reduction schemes, technology transfer and especially removal of burdensome administrative bureaucracy.

Anthill -Alternative nest and trading/training hub for ingenious/ indigenous little livelihood by Ms. Anya Lim, Managing Director, Co-Founder/Princess Ant, Anthill Fabric Gallery, the Philippines

There are two main problems facing the local artisans in the Philippines, namely lack of market access and gap in cultural continuity. Artisans in rural and indigenous communities have little to no fair access to markets. They are vulnerable to middlemen who purchase their products at very low prices. This leads artisans to undervalue their skills and talents. Majority of the artisans in their elder years are at an average age of 55 years old. They do not see the relevance in teaching the craft and the younger generation do not see the economic opportunity and value in preserving these traditions. In order to address the difficulty in market access and to create a sustainable livelihood, there are a number of measures which can be implemented simultaneously, that is long term partnerships with other stakeholders in the value chain to help provide access to sustainable markets. Profitability and product diversity can be increased through upcycling of textile waste from production while helping the environment. Innovative products in contemporary designs relevant to the market are developed. On the demand side, increasing the number of people who wear weaves through design for everyday wear shall ensure more works for the artisans.

A good way to preserve cultural continuity is through enterprise development in the artisan community. To develop enterprises, there are a number of items to work on including developing entrepreneurial skills of community artisans through training programs, increasing production capacity of partner artisans, and increasing the number of younger weavers through a Master and Apprentice program.

Anthill Fabric Gallery is a trading/training hub with the mission to provide sustainable livelihood for the Philippines' artisan communities. Anthill Fabric Gallery guides the

transformation of artisan communities into local business enterprises. Anthill provides training programs, fair trade pricing and market access resulting in sustainable livelihoods and lasting cultural preservation.

In the digital age, the artisan communities face certain challenges which are infrastructure & connectivity; skills & competencies; financing technologies & digitalization; and connecting to markets.

3. Innovation and digitalization – crucial factors for women entrepreneurship in textile and garment industry in the new era

Catalyzing Women’s Entrepreneurship in the Digital Age by Mr. Jonathan Tsuen Yip Wong, Chief of Technology and Innovation, Trade, Investment, and Innovation Division, United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP)

The effects of the pandemic on women entrepreneurs across the region have been disproportionate to those of their male counterparts. Women have continued to take on even more of the burden of unpaid care work and homeschooling. Women entrepreneurs, who predominantly make up the informal sector, face a range of financial and digital-literacy constraints affecting business continuity.

Advancing women’s equality in the Asia-Pacific region could add as much as 4.5 trillion U.S. dollars, a 12 percent increase to the region’s gross domestic product annually by 2025.

In the digital age, UNESCAP supports women entrepreneurs in 4 main areas: enabling policy environment; access to investment through digital finance; digital skills; and access to customers and markets through the platform economy. UNESCAP has been working to influence Small and Medium Enterprise policies and laws with Government partners. For example, in Cambodia, UNESCAP has worked with the Ministry of Industry, Science, Technology and Innovation to review the economy’s SME policy and included special measures for women entrepreneurs.

UNESCAP has been working with various partners to develop programs/mobile apps such as ifarmer, SHE, Kiu Viet Nam, ecomviet etc. to support women entrepreneurship. For example, Kiu Viet Nam, a mobile apps, is a business management platform to support women-owned or led MSMEs in Viet Nam by providing MSMEs with digital tools for record-keeping,

which allow them to connect with financial institutions to offer financing using the MSMEs transaction history.

To sum up, continued investment in the digital economy will be critical to create a vibrant fintech ecosystem for more inclusive finance and investment, particularly for women entrepreneurs. Digital skills for women entrepreneurs need to be a priority policy. Governments should strategically integrate gender dimensions in entrepreneurship policies.

Innovation and Digitalization: Crucial Factors for Women Entrepreneurship in the New Era, presented by Ms Chau Nguyen, Founder/CEO of Van Hoa Creative

In her experience in supporting SMEs in Viet Nam in the field of brand identity design, digital visual assets management and cultural-based communication campaign development, she stresses on the diversity and creativity that SMEs in general and women-led SMEs in T&G industry could focus on as a strategy to develop their business. The T&G industry has witnessed a significantly harsh competition and SMEs would find it more challenging given their limits in human resources, capital, or technology. In Viet Nam, many textiles SMEs face with more difficulties because they are not yet able to manage the materials resources. Local ownership over materials resources remains a big issue since they still have to import materials that makes SMEs hard to manage their inputs in a sustainable, stable, and efficient manner. It is recommended that the R&D on new materials and on textile structure should be promoted to help local enterprises be more actively manageable of the manufacturing inputs as well as more competitive in the market. Given the increasing concerns over environment and sustainability, SMEs could focus more on using recycled materials, natural-based ingredients, upgrading natural-dyed color pallets, and improving local techniques for uniqueness.

From another aspect, SMEs could explore to improve their values by more investment into design and branding (style & design, local brands, and digital visual), which contributes to improving their competitiveness. Especially, in the digital era, SMEs in the T&G could harness the power of visual image, virtual try-on function, and digital branding & assets management on different platforms & media to access to more customers.

Collaborations and network would also help to connect local brands. Inter-collaboration activities among scientists (focusing on R&D), corporate (with invest & scale-up), and SMEs (pilot) could be promoted with views of strengthening cooperation and support for and among SMEs enterprises in the market.

4. Incentives in promoting women-led SMEs in textile and garment industry

Support Women Employees in SMEs, Promote Gender Equality in Textile Industry, Practice of CNTAC by Zheng Jian, International Project Director, Office for Social Responsibility, China National Textile and Apparel Council – CNTAC, China.

Among the efforts to promote the textile and apparel industry, China National Textile and Apparel Council (CNTAC) underlines the corporate social responsibility (CSR) through focusing on information disclosure, management system and researching; promoting people-oriented, environmental protection and fair market; and initiating the alignment between sustainability standard systems with the establishment of Multi-stakeholders Advisory Committee (MAC).

China also sets gender equality as one among the priorities in Social Responsibility Development Goals of the China's Textile Industry 2025 given its importance and contribution of women in employment (60% of 23 million employees in the T&G industry). However, gender discrimination still exists in employment.

So as to improve the capacity for the industry, CSC9000T, an industry initiative was formulated in 2005 and then revised in 2008 and 2018 with 9 core subjects focusing on new management methodology and extended scope, namely: labour rights, consumers, community, pollution, resources, climate change, innovation, fair operation, and supply chain. With views of promoting employees' rights including those of women, since 2018, it has added more efforts such as: respecting employees' development needs; improving employees' professional qualities and skills; providing career development training, promotion paths, sense of career fulfillment; focusing on employees' mental health; creating a diverse culture; and caring for employees and their families to encourage the work-life balance. CNTAC makes efforts to promote women empowerment at workplace, from preventing sexual harassment to fostering women leadership. From the industry level, the industry platform was established to enhance career values of women and sustainable development of companies. From the enterprise level, it focuses on improving management mechanism through developing a guidance for enterprises, revising management documents (recruitment, maternity leave, welfare, prevention, and control of sexual harassment); establishing workers' committee, revising employees' handbook; and improving grievance mechanism. In addition, capacity building programs are designed to support employees through concentrated training and internal training programs.

Besides, CNTAC together with UN Women, and We Empower has developed the Women Entrepreneurship Principles (WEPs) to promote women entrepreneurship in the T&G industry

in China. So far, the Guidance of Promoting WEPs in Textile Industry has been developed and implemented; 91 Chinese textile companies have signed CEO statements to support WEPs; and 10 companies have been selected as best practices of implementing WEPs.

Viet Nam's incentives and practices, presented by Ms Nguyen Huong Tra, Viet Nam

In Viet Nam, enterprises operate under the umbrella of the Labour Code 2019, the SMEs Support Law 2017, the Strategy on Gender Equality 2016 – 2020, provincial strategies for SMEs development, and the Decision to support enterprises' skill development after Covid 19. Besides, there have been women entrepreneurship promotion programs to support women-led enterprises, such as start-ups support, trade promotion, skill development, networking, gender equality & community development, and platforms for women-owned business & women entrepreneurship across industries. In regards to the T&G industry in particular, the incentive “Better Work”, “a collaboration between the United Nation’s International Labour Organization (ILO) and the International Finance Corporation (IFC), a member of the World Bank Group – is a comprehensive programme bringing together all levels of the garment industry to improve working conditions and respect labour rights for workers, and boost the competitiveness of apparel businesses”. Two APEC member economies included in this program are Indonesia (since 2011, with 216 factories, and 385,580 workers); and Viet Nam (since 2009, with 392 factories, and 600,000 workers). Under this program, enterprises are supported with training for brands with aims of improving purchasing practices and supply chain; supervisory skills training for owners and managers, which contributes to a 22% productivity increase; and service packages for factories to improve compliance and capability to access to market. At the domestic level, Viet Nam has set up programs for career path development for women managers in the T&G industry to support women-led SMEs in general, women managers in particular. Under these programs, capable staff are selected to join in the training through collaborative courses organised by universities and colleges. During the training, they are offered with full training fee, salary, and benefit packages. It is expected that the programs would contribute significantly to building capacity for women and supporting them in higher position in T&G SMEs for the sake of dynamism and sustainability.

Incentives to promote women-led SMEs in T&G industry in Malaysia, presented by Ms Regina Leong, President of Malaysian Textile and Apparel Centre (MATAC); Vice President of Malaysian Textile Manufacturers Association (MTMA); Honorary Secretary of the Federation of Malaysian Fashion Textile and Apparel (FMFTA); Permanent Secretary General of ASEAN Federation of Textile Industries (AFTEX)

In Malaysia, women and women entrepreneurship are supported from different levels. At the governmental level, Ministry of Women, Family and Community Development oversees all related issues to women. The Government has promulgated Sexual Harassment at Workplace (Employment Act 2012), Domestic Violent Act 1994 and Securities Commission Malaysia (Women Board of Directors) to protect and promote women development.

From the business perspective, women entrepreneurship has been promoted and supported by various institutions, including but not limited to SME Corp (Support for Women's Entrepreneurs); SME Bank (Financing for Women in business); and TEKU (Entrepreneurship assistance). Besides, they are also facilitated and supported by a range of non-profit organizations such as NAWEM, WOW, WIM, Chamber of Business, etc.; and by community such as Women's Aid Organization, Department of Social Welfare, All Women Action Society, Legal Advisory and Women Aid Centre, Research bodies/agencies on Women (KANITA, ARROW, etc.).

There have been incentives to promote the women workforce such as incentives to hire single mothers and unemployed women into the workforce, recruit women freelancer (Gig Economy), or tax exemption for women returning to work. With regards to business owners, there have been financial assistance from SME Corp, Government agencies, banks, etc., and capacity building in management that are specially designed for women entrepreneurs.

Apart from financial and capacity assistance, Malaysia also focuses on non-monetary incentives to support SMEs. For example, diversity is emphasized with views that women provide unique perspectives, experiences and work styles as compared to their male counterparts. Besides, women business leaders have higher rates of EQ. Nurturing, supporting and fluent in managing emotions at workplace might help enhance emotional intelligence, and therefore, support women entrepreneurs to enhance their competitiveness compared to their male counterparts (Source: Forbes). Women are also encouraged to think differently since they can creatively solve problems on the spot while simultaneously considering every possible outcome as well as more resilient when facing with challenges.

Presented by Ms Celia B. Elumba; Director IV, Department of Science & Technology, Philippine Textile Research Institute (PTRI)

The Philippine Textile Research Institute (PTRI) is a research and development arm of the Department of Science and Technology that provides R&D, technical services and technology

transfer related to textiles, for all applications, from wearables to home furnishings, industrial, technical, or medical textiles.

In practice, the Philippines is aware of their challenges in the T&G industry, such as lack of scale in fibre supply, no fibre treatment capacity, lack of spinning capacity. The Philippines has decided to put more efforts to develop materials since it is estimated to take up more than 50% of the product cost, therefore should be manageable of the material production rather than imports to ensure a higher position in the value chain. Natural textile is selected as a PTRI flagship program with a focus on abaca, a plant endemic to the Philippines, and another two agricultural waste products from banana and pineapple leaf.

The PTRI has developed the PTRI Inclusive Innovation TELA (Textiles Empowering Lives Anew) Program to promote textile development in a more innovative, inclusive, and sustainable manner. The sources for input materials have been developed within a 50 -150 km radius to facilitate logistics support for an end-to-end application. It enables the cultivation of the natural textile materials, dye sources, NTF cultivation, TELA weaving villages, centers, facilities, retail outlets, museums, sewing studios, and a college or university for academic support to be ideally available within reach to promote the local economy efficiently and robustly.

PTRI programs will incorporate the Regional Yarn Production and Innovation Center (RYPIC), the Regional Handloom Weaving Innovation Centers, and the Natural Raw Material Innovation Hubs for textile fibres (abaca, banana, pineapple leaf, bandala in one system and bamboo in another system) to promote integration of the community and the textile eco-system.

IV. Recommendations and Conclusions

Through the sharing of information and experiences among APEC member economies at the Workshop, speakers and participants have exchanged views on what individual government and APEC should do to promote the restructuring in women-led SMEs in textile and garment industry in the new era to promote the inclusiveness and dynamism. Recommendations are as follows:

At economy's level:

- Increase automation and digitalization.
- Skill development to improve the skills for the workforce.
- Special fund for women entrepreneurs affected by the Covid 19.

- Provide capital assistance, guidance, and training for women entrepreneurs to improve knowledge and technological capacity.
- Promote Research, Development, and Innovation (RDI) in the industry.
- Issue specific gender-sensitive policies related to trade, investment, technology, and innovation.
- Provide tailored support to address various needs of women entrepreneurs based on thorough needs assessment/ survey.
- Improve labor policies to help SMEs improve workers' skills and invest in more advanced equipment, technologies.
- Develop more conducive employment environment for workers in the industry, with a special focus on young women workers, equal pay, and worker safety issues including sexual harassment.

At APEC level:

- Prepare APEC inclusive business guideline to enable more inclusion of women and people at the bottom of the pyramid, including the promotion of women at the top of the pyramid.
- Promote further cooperation through workshops, seminars, dialogues, training activities
- Propose and implement an international/ regional project on promotion of women progress, with participation of other stakeholders such as NGOs.