Chapter 23

Going digital: The future of work for women

Key findings

- Women can benefit from flexibility and choice in where, when, and how to work, and this flexibility may boost their employment rates. However, these benefits may be offset by lower job quality. If more flexibility results in increased working hours and problems in separating work and personal life, the bottom line may simply be greater stress.
- Most workers participate in the platform economy to supplement incomes from other paid work and to balance family responsibilities. This suggests women may benefit from work in the platform economy, but – aside from some sales platforms – women are so far not better represented in platform work than men.
- The risk of automation has traditionally been associated with manufacturing, and therefore primarily male jobs. However, some large industries with high shares of women, such as food and beverage service activities and retail trade, are at a high average risk of automation. OECD analysis suggests that, summing across all industries, the average risk of automation is similar for men and women.

This chapter is based on the "OECD Policy Brief on the Future of Work", published under the same name in July 2017 and available at http://www.oecd.org/els/emp/future-of-work/Going-Digital-the-Future-of-Work-for-Women.pdf.

The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

Will the ongoing digital transformation strengthen the position of women in the labour market? More flexible ways of working may make it easier to combine paid work with caring responsibilities, which are still more often taken on by women. Automation is also more likely to replace less skilled jobs, giving women an advantage since they now outperform men on most measures of educational attainment.

However, a closer look at the evidence suggests a mixed picture. Women and men have just as much to gain and fear from new digital technologies. Women may benefit from increased flexibility in work, but the unscrupulous use of new atypical work arrangements may also reduce job quality. Automation has so far been most common in sectors like agriculture and manufacturing, where men dominate. But in the future, automation is expected to spread, albeit to different degrees, across all sectors and most occupations, including those traditionally dominated by women, such as retail trade, food and beverage services. In addition, jobs are likely to grow the most in business services, health, education and social services – many of which have been traditionally female-dominated. At the same time, persistent gender differences in field of study (Chapters 6 and 7) may mean that women will benefit less from the new job opportunities in STEM-related occupations.

Whether digitalisation will close or widen gender gaps in the labour market will, to a large extent, depend on policy. Governments therefore have a crucial role to play. This chapter discusses the possible impact of digitalisation on women and men, and proposes a range of policies to ensure that technological change supports a closing, and not a widening, of gender gaps.

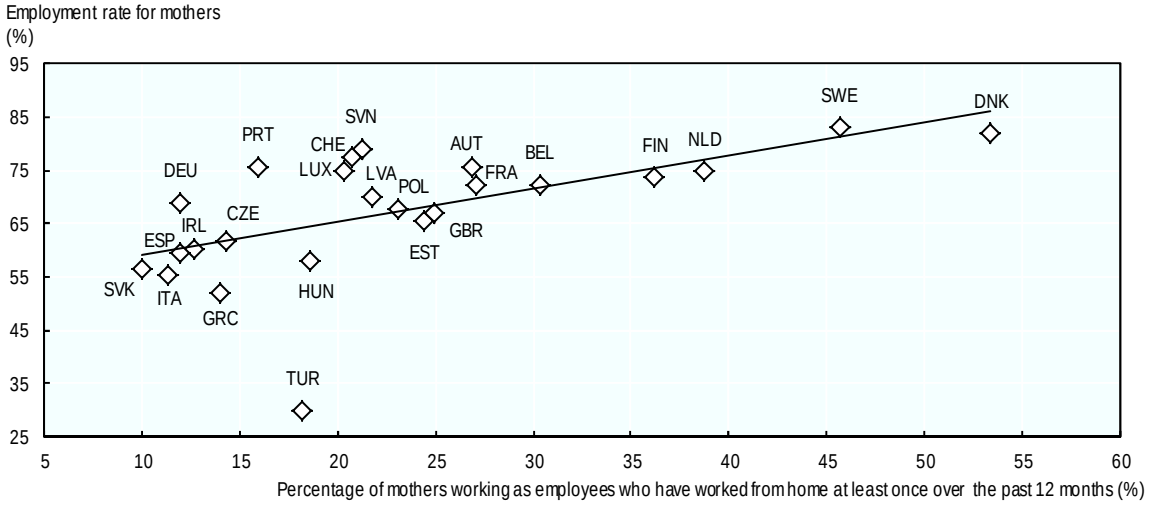
More flexibility in work can increase women's employment, but also raises concerns about job quality

Flexibility and choice in where, when and how to work can be beneficial to women and, in particular, may boost their employment rates. For example, countries with the highest shares of women working from home also tend to have high maternal employment rates (Figure 23.1) – while no such relationship emerges for men. Moreover, evidence from the United States shows that gender pay gaps tend to be lower in industries where working arrangements are more flexible (Goldin, 2014). Those are typically industries where work can be split into self-contained tasks and allocated to multiple workers without requiring each one of them to work long and inflexible hours.

However, these benefits may be offset by lower job quality. OECD work shows that well-being suffers when the demands placed upon workers by employers are not in line with the resources at workers' disposal (OECD, 2014). If more flexibility results in increased working hours and problems in separating work and personal life, the bottom line may simply be greater stress. Whether such flexibility ends up being good or bad for workers will depend on (see also Chapter 18) whether it is: i) voluntary or not; ii) associated with more or less work autonomy; and iii) paired with more or less job security.

Figure 23.1. Greater work flexibility correlates with higher maternal employment

Percentage of mothers (all ages) working as employees who have worked from home at least once over the past 12 months, and employment rates (%) for mothers (15-64 year-olds), 2014/15



Note: Data on working from home refer to 2015. Data on maternal employment refer to 2014, except for Denmark and Finland (2012) and Germany and Turkey (2013). "Mothers" are defined as women with at least one child aged 0-14. For Sweden, for the data on maternal employment, data refer to women aged 15-74 with at least one child aged 0-18.

Source: *OECD Family Database*, http://www.oecd.org/els/family/database.htm, and OECD Secretariat calculations based on the Sixth European Working Conditions Survey, https://www.eurofound.europa.eu/surveys/european-working-conditions-surveys.

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The impact of digitally-mediated platforms on gender gaps is still unclear

"Non-standard work", such as part-time, temporary or self-employment, is not a new phenomenon; it already accounts for about one in three jobs across the OECD (OECD, 2015a). But new digital technologies and applications are allowing more freedom in where and when work is carried out.

The rise of the platform economy, while fast, still affects only a small share of workers: in 2015 an estimated 0.5% of US workers provided services through online intermediaries (Katz and Krueger, 2016). Most workers participate in the platform economy to supplement incomes from other paid work and to balance family responsibilities – which are still taken on predominantly by women. In the United States, for example, the proportion of female drivers is higher for Uber (14%) than for traditional taxis (8%). Women (42%) are more likely than men (29%) to say that their main reason for driving with Uber is that they "can only work part-time or flexible schedules" because of a "family, education, or health reason" (Hall and Krueger, 2015).

However, the very high turnover of platform workers suggests that such work may be associated with lower job quality. One study found that more than half of online platform participants quit within 12 months, and that women were more likely to drop out than men: 62% and 54%, respectively (JPM, 2016). Older, male workers making less income and who experienced at least one month of non-employment were more likely to stay attached to platforms.

Other aspects of platform work, however, may be more beneficial to women. For example, online job platforms have an international reach and can provide opportunities for

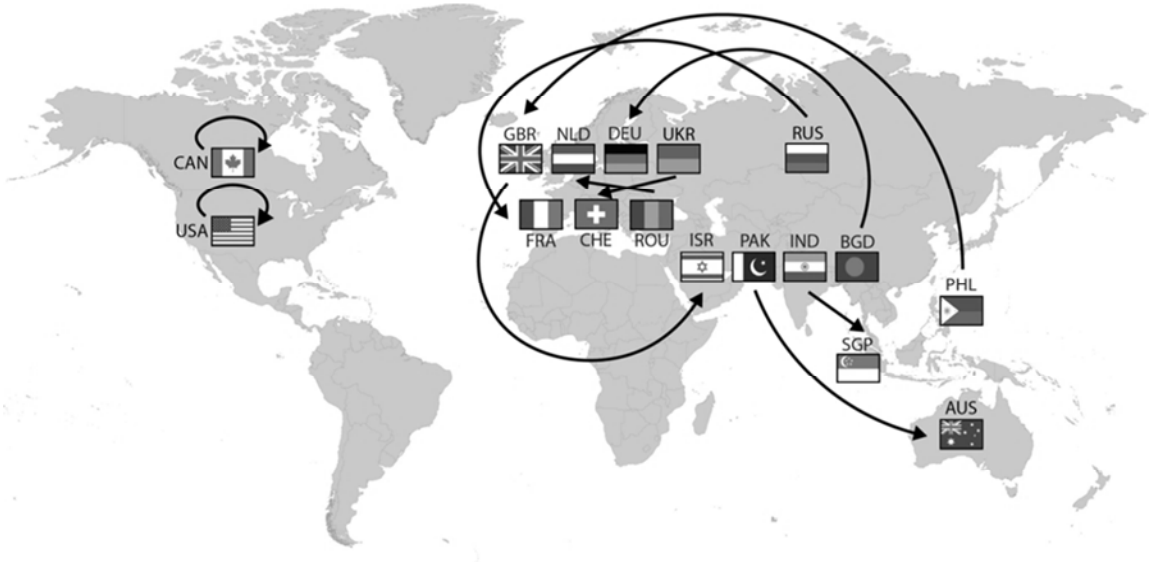
women to work and exit from the shadow and grey economy in countries where cultural barriers or rules make it difficult for them to work in the formal economy. As shown in Figure 23.2, workers providing services on online platforms appear to be mostly located in low-income countries while employers are mainly based in high-income ones. However, policy must ensure that online platforms do provide real opportunity, rather than substituting a traditional sweat shop for a digital one.

A recent Facebook, OECD and World Bank survey of online entrepreneurs operating on Facebook found that women-run firms exceeded the percentage run by men in Australia, Canada, the Philippines, the United Kingdom and the United States, and tied with men in Thailand (OECD, 2017a). And, in contrast to the offline world, female entrepreneurs on Facebook had, on average, similar business confidence scores as men – while in Malaysia and the Philippines women tended to be significantly more optimistic (OECD, 2017a). The study concluded that digital businesses may help level the playing field for women and men since customers can be reached across the world and cultural norms are avoided.

So far, however, women do not appear to be more present in the platform economy than men. On the contrary, United States data indicate that most of the participants in the online platform economy are men (JPM, 2016), although women are a majority on Etsy (89%), a large sales platform for self-made goods, as well as on Airbnb (67%) (MBO, 2015). Similarly, in the United Kingdom, an estimated 69% of gig workers are male (RSA, 2017). How technology-induced flexibility will influence gender gaps therefore remains to be seen.

Figure 23.2. Digital service workers on online platforms are mostly located in low-income countries

Top ten employer and provider countries on Upwork, 2014



Note: Upwork is one of the leading global freelancing platforms. Top 10 employer (provider) countries are denoted by their flags and three-digit international codes. Circular arrows denote flows where employer and provider countries coincide.

Source: OECD (2016), "New Forms of Work in the Digital Economy", *OECD Digital Economy Papers*, No. 260, OECD Publishing, Paris, http://dx.doi.org/10.1787/5jlwnklt820x-en, based on Upwork, 2015.

Automation is expected to spread across most sectors and occupations, affecting both men and women

Digitalisation is creating job opportunities in new industries (e.g. platform-based services and digital products) and new occupations (e.g. software developers, data analysts, medical imagining specialists, bloggers and others) (OECD, 2016b). But it also leads to job losses, as more and more tasks traditionally performed by humans are either automated or off-shored, or both. Already, the occupational structure is becoming more polarised in many countries, with job losses primarily in middle-skilled routine occupations and job creation in both high- and low-skilled ones (Autor et al., 2006; Marcolin et al., 2016; OECD, 2017b).

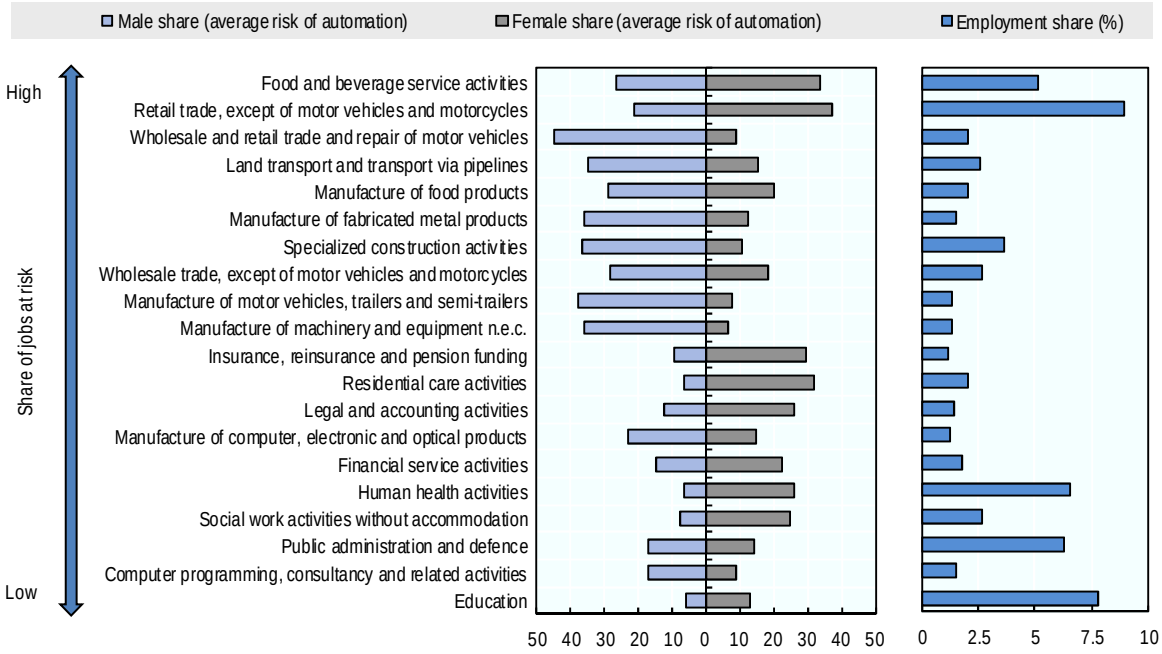
Looking ahead, it has been estimated that 9% of jobs are at high risk of automation in OECD countries (i.e. over 70% of tasks in those jobs could be automated), and that an additional 25% of jobs could change significantly as many (between 50 and 70%) of the associated tasks could be automated (OECD, 2016c).

While the risk of automation has traditionally been associated with manufacturing, and therefore primarily male jobs, further OECD analysis shows a mixed and more balanced picture. Some large industries with high shares of women are at a high average risk of automation: food and beverage service activities and retail trade (Figure 23.3). Men, in turn, dominate in industries like manufacturing, construction and transportation where the average risk of automation is also high. Other female-dominated sectors, such as education, social work and health care have a lower risk of job automation; but since many women work in these large sectors, the absolute number of female workers at risk of being displaced is still high. Summing across all industries, the average risk of automation is similar for men and women.

Being at risk of automation is not the same as actual job loss. First, adoption of new technologies is often slow due to economic, legal and societal hurdles. For example, even though the technology for driverless cars already exists, a host of legal, ethical, safety and social reasons explain why robots have not yet replaced drivers. Second, history shows that workers have adapted to major changes during large technological revolutions by changing the tasks that they perform at work, thus avoiding mass technological unemployment. This has been the case of bank tellers, for example, following the introduction of automated teller machines (ATMs). Evidence for the United States shows that, while the number of ATMs rose, so did the number of bank tellers – who evolved from performing routine transactions to becoming part of the "relationship banking team" focused on problem solving and marketing (Bessen, 2015). Third, while innovation may reduce labour demand and raise unemployment, at least in the short run, it also triggers automatic market adjustments working in the opposite direction, such as the production of new digital goods and services; higher consumption of non-digital products following lower production costs and prices; as well as higher investment in digital technologies across sectors (OECD, 2016d).

Figure 23.3. The risk of automation varies by industry

Share of jobs at risk, by industry and gender



Note: The figure shows the 20 industries with the greatest number of jobs at risk of automation (measured as the average risk of automation weighted by the employment share of the industry), with industries sorted from top to bottom in descending order according to the overall risk of automation. The width of each bar in the left panel represents the average share of jobs at risk in each industry. The placement of each bar relative to the centre line depicts how that risk is shared between men (light blue) and women (grey). Values in the right panel represent the share of total employment held by each industry. Risk of automation values are based on the likelihoods calculated by Arntz et al. (2016). Countries covered in this analysis include the 29 OECD countries that participated in the first and second rounds of the Survey of Adult Skills (PIAAC).

Source: OECD Secretariat calculations based on the Survey of Adult Skills (PIAAC) 2012 and 2015, and Arntz, M., T. Gregory and U. Zierahn (2016), "The Risk of Automation in OECD Countries: A Comparative Analysis", *OECD Social, Employment and Migration Working Papers*, No. 189, OECD Publishing, Paris, http://dx.doi.org/10.1787/5jlz9h56dvq7-en.

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The new world of work will depend crucially on skills

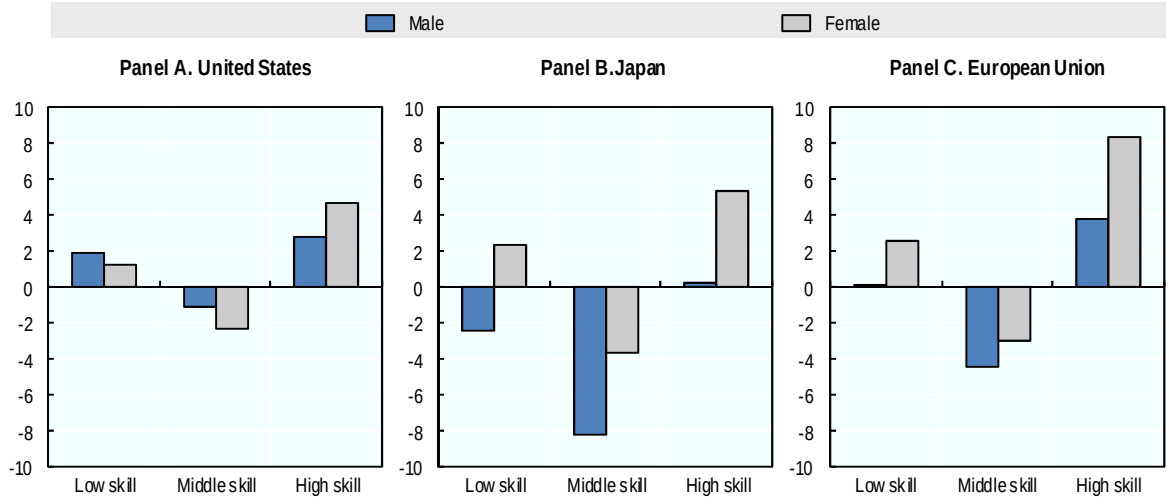
Skills provide an important safeguard against the risk of automation. Fewer than 5% of workers with a tertiary degree are at a high risk of losing their job due to automation, on average, compared to 40% of workers with a lower secondary degree (Arntz et al., 2016; OECD, 2016c). This is good news for women. Across OECD countries, more women than men are now tertiary graduates (OECD, 2016d). Indeed, looking at the type of jobs gained and lost over the last 15 years, shows that most job growth has been on the high-skill end, and that women have benefited from this more than men (Figure 23.4). This is true in the United States, Japan, as well as in Europe as a whole. Similarly, jobs in the middle of the skills distribution have declined in absolute terms in all countries, but the gender distribution of losses varies by country. Everywhere, more women now also work in low-skilled jobs. In the United States, a larger share of the growth in low-skilled jobs has gone to men, while the opposite is true in Europe. In Japan, the number of men in low-skilled jobs has declined.

"Soft" skills are also likely to grow in importance in the new world of work. Evidence from the United States shows that the ability to work in teams, problem-solving and

communication skills will be particularly sought after (Deming, 2015). The U.S. Bureau of Labor Statistics estimates that occupational employment at the national level is projected to increase by 30-40 percent for home health aides, physician assistants and nurse practitioners from 2014-2024 (BLS, 2015). However, recent OECD analysis (Grundke et al., 2017) shows that gender differences in soft skills, such as self-organisation, management and communication skills, are very small (Figure 23.5). Women appear to have higher ICT skills, but lag behind men when it comes to quantitative and mathematics-related skills.

Figure 23.4. Women have gained most from the growth in high-skilled jobs

Change in employment levels from 2003 to 2015[a] by gender and skill level, United States, Japan and European Union,[b] millions of jobs



Note: High-skill occupations include jobs classified under the ISCO-88 major groups 1, 2 and 3: legislators, senior officials, and managers (group 1), professionals (group 2), and technicians and associate professionals (group 3). Middle skill occupations include jobs classified under the ISCO-88 major groups 4, 7 and 8, that is, clerks (group 4), craft and related trades workers (group 7), and plant and machine operators and assemblers (group 8). Low skill occupations include jobs classified under the ISCO-88 major groups 5 and 9: service workers and shop and market sales workers (group 5), and elementary occupations (group 9).

a) Data for Japan are for the period 2003 to 2010 due to a structural break in the data.

b) Data for the European Union cover all European Union member countries except for Croatia, Malta and the Slovak Republic. Data for Germany are from 2003 to 2013. Data for beyond 2010 are mapped from ISCO-08 to ISCO-88 using a many-to-many mapping technique.

Source: OECD Secretariat estimates based on the European Union Labour Force Survey (EU-LFS) for the European Union, the Japanese Labour Force Survey (LFS) for Japan, and the United States Current Population Survey Merged Outgoing Rotation Groups (CPS MORG) files for the United States.

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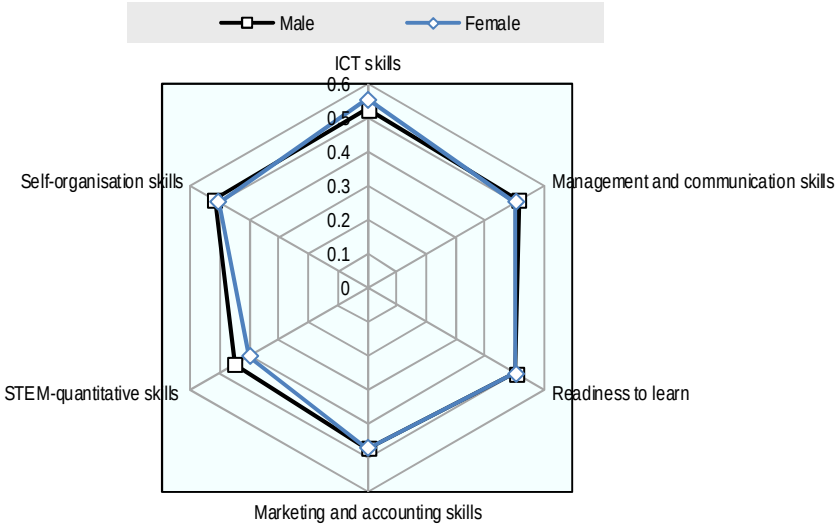
Figure 23.5. Women and men have very similar skills, except for STEM-quantitative skills

Median values, by gender



Note: Estimates based all countries that participated in the first and second rounds of the Survey of Adult Skills (PIAAC). "ICT skills" measure proficiency in ICT use such as programming software or navigating the internet.

Source: OECD Secretariat estimates based on Grundke, R. et al. (2017), "Skills and Global Value Chains: A Characterisation", *OECD Science, Technology and Industry Working Papers*, No. 2017/05, OECD Publishing, Paris, http://dx.doi.org/10.1787/cdb5de9b-en.

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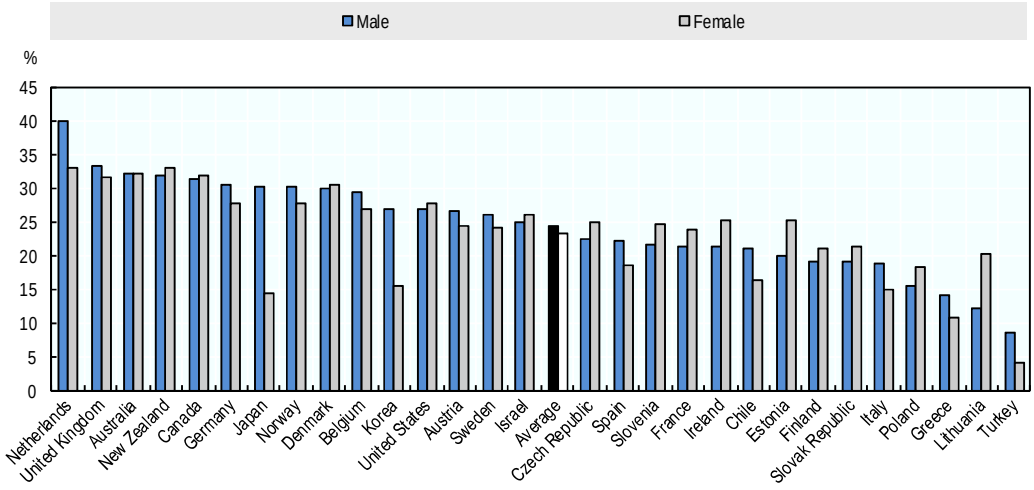
While gender gaps in general ICT skills (Figure 23.5) and the use of software at work (Figure 23.6) tend to be quite small in most countries, there is a large gender gap in ICT specialist skills: 5.5% of male workers in OECD countries are ICT specialists but only 1.4% of female workers (Figure 23.7). This gap needs to be closed. It should be noted, however, that the majority of job growth is likely to be concentrated in business, as well as in health, education and social services (Cedefop, 2016). Most new jobs will therefore not require high-level STEM skills.

Figure 23.6. In most countries, gender differences in the use of software at work are small

Daily users of office software at work, by gender, as a percentage of all workers, 2012 or 2015



Note: Data for Belgium refer to Flanders and for the United Kingdom to England and Northern Ireland, only. Data for the following 22 countries are based on the first round of the Survey of Adult Skills (PIAAC) and refer to the year 2012: Australia, Austria, Belgium (Flanders), Canada, the Czech Republic, Germany, Denmark, Estonia, Finland, France, Ireland, Italy, Japan, Korea, the Netherlands, Norway, Poland, the Slovak Republic, Spain, Sweden, the United Kingdom (England and Northern Ireland), and the United States. Data for the remaining countries come from the second round of the first wave of the PIAAC survey and refer to 2015.

Source: OECD Secretariat calculations based on the Survey of Adult Skills (PIAAC) 2012 and 2015.

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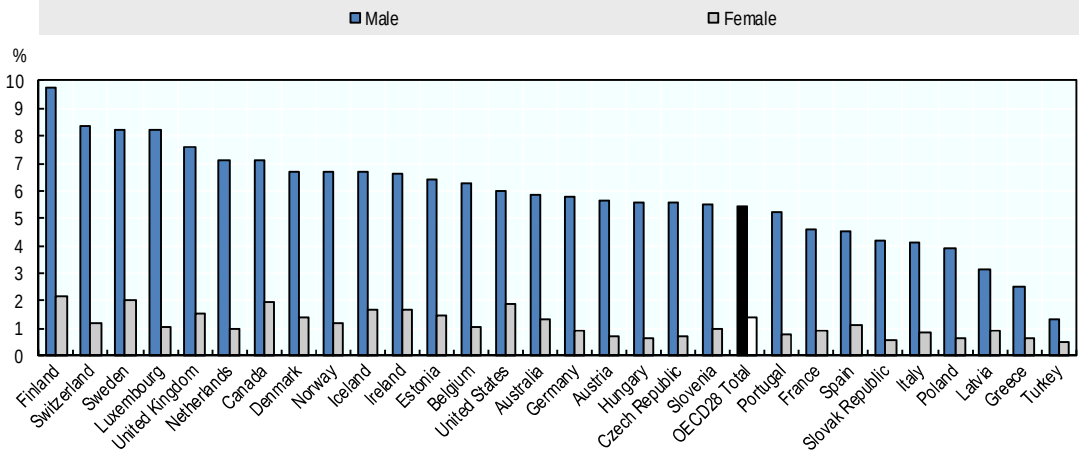
Figure 23.7. Most ICT specialists are men

ICT specialists as a percentage of all male and female workers, 2014



Note: ICT specialists are defined as individuals employed in "tasks related to developing, maintaining and operating ICT systems and where ICTs are the main part of their job". ICT specialists' figures are based on the following ISCO-08 3-digits occupations: 133, 215, 25, 35, 742. The "OECD28 Total" is the weighted average for all 28 OECD countries with available data.

Source: OECD (2016), "Skills for a Digital World: 2016 Ministerial Meeting on the Digital Economy Background Report", *OECD Digital Economy Papers*, No. 250, OECD Publishing, Paris, http://dx.doi.org/10.1787/5jlwz83z3wnw-en.

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Policy can help improve women's labour market prospects in the new world of work

The digital transformation offers an opportunity to lower some of the barriers women in the workforce have been facing. But this will not happen automatically and, without action, barriers could even increase. To avoid this, policy makers will need to implement a variety of measures.

Promote female participation in STEM

While women now outperform men in overall educational attainment in OECD countries, they remain far less likely to pursue studies in the most specialised STEM fields (Chapter 7). Given that women are underrepresented in STEM, women are unlikely to benefit from new job opportunities in engineering, intensive computer and mathematical work and related fields. Gender segregation by field of study and the resulting knowledge gaps in scientific subjects should be addressed by removing gender bias in curricula and parental attitudes; raising students' awareness about the likely consequences of choosing different fields of study; and facilitating women's access to STEM-related jobs through apprenticeships. Attitudes and stereotypes can also be affected through the use of role-models, networks and popular culture.

Remove barriers to lifelong learning

Adapting and upgrading the skills and competences of those already in the labour market also requires urgent policy action. Workers who are most exposed to the risk of automation are the least likely to participate in training: only around 40% of them participate in training each year, compared to 70% of those who are at low risk of automation – with little difference between men and women. For women, adult learning can also help during family-related absences from work (such as maternity leave or eldercare) which, given the speed of technological change, may make the return to work difficult.

Ensure gender equality in support for displaced workers. Policies to cope with the labour market adjustment provoked by digitalisation (and globalisation) may be inadvertently biased against women. For example, schemes for displaced workers often focus on large scale retrenchments in industrial sectors whereas women in the service sector often do not receive such support. Giving all displaced workers access to the same types of services, regardless of the sector or the size of their previous employer, will help improve re-employment rates for both men and women.

Close gender gaps in access to, and in the use of, new technologies. The job effects of digitalisation also depend on access. About 60% of the world population, many of them women in low- and middle-income countries, still have no access to the internet: 250 million fewer women are online than men, and 1.7 billion women do not own a mobile phone (ITU, 2017). Many women face affordability barriers due to higher levels of female poverty and less access to financial services. Improving access to networks relies on physical factors, such as an adequate power supply; affordable prices require a competitive environment that encourages market entry since entrants typically introduce the newest technology which in turn improves coverage and lowers prices. National connectivity policies should apply a gender lens to ensure equal access for all. This will also require collecting gender-disaggregated data.

Promote flexible ways of working using new technologies

Employees and employers can use new technologies to reorganise work schedules and introduce job sharing and home offices. Better reconciliation of work and family life will benefit all workers, but in particular women who in all countries still bear the brunt of family responsibilities and usually work fewer paid hours than men. Employers obviously are key in promoting workplace flexibility, but governments can help by (Chapter 18): i) granting all employees a right to request flexible working time arrangements; ii) encouraging social partners to cover flexible workplace practices in collective bargaining agreements; and iii) helping companies change their work organisation through the exchange of best practice and information campaigns promoting a change in the workplace culture (OECD, 2016e). Also, digital technologies and the flexible ways of working they may enable, could help foster more gender-balanced career paths and thus reduce earnings inequalities.

At the same time, governments need to ensure more flexible ways of working do not lower job quality. This includes guaranteeing that working time regulations (including minimum rest periods) are respected, that such regulations are reviewed in light of the latest technological developments, and providing guidance for employees and employers on good practices in terms of flexible work arrangements, including training and awareness raising on both the benefits and potential risks. Highly mobile workers, who regularly work outside the employer's premises, report less positive outcomes than other employees regarding their work-life balance, health and well-being at work (Eurofound/ILO, 2017); this group therefore needs special attention.

Finally, social protection systems must adapt to new forms of work. The rise of non-standard employment is challenging traditional forms of social protection which were often built around the male breadwinner in stable, long-term employment. Non-standard workers, and thus many women, are unlikely to benefit from the same advantages as those on standard work contracts. For example, across the European Union, an estimated 46% of self-employed women aged 15-49 are not entitled to maternity benefits (European Commission, 2015). Tax and benefit systems need to be adapted so that all workers are covered. Portability regulation can prevent the loss of social benefit entitlements when workers move between jobs and countries. In France, an individual activity account has been introduced which attaches rights to training and overtime to workers rather than to jobs; in Germany a similar model is being considered. Another good practice example can be found in the United States, multi-employer plans allow mobile workers to earn and retain their benefits even as they move between employers. Finally, governments may want to expand the role of non-contributory schemes. Several countries are now also experimenting with various forms of basic income schemes.

Key policy messages

- Governments should design smart education policies to ensure that women not miss out on jobs in digital technology. Getting more young women into in-demand STEM fields (Chapter 7) and enabling workers to upgrade their skills are important steps.
- Ensure that national connectivity policies close gender gaps in access to and use of new technologies. Related to connectivity, governments and employers should enable flexible work among employees but ensure that more flexible ways of working do not lower job quality, e.g. by guaranteeing working time regulations.
- Adapt social protection systems to the rise of non-standard employment and ensure that non-standard workers can contribute to – and benefit from, the standard social protection arrangements.

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