



**A day to bleed: Exploring the effects of menstruation leave on the  
representation of women in the workplace in Zambia**

**Memory Bwalya Chirwa**

**CHRMEM001**

**Supervisor: Dr Preeya Daya**

A dissertation submitted in partial fulfilment of the requirements for  
the award of the degree of

**Master Philosophy in Inclusive Innovation**

**Graduate School of Business**

**University of Cape Town**

April 2025

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## ABSTRACT

This study examined how Zambia's menstruation leave policy, locally referred to as *Mother's Day*, influences the recruitment and retention of women in the financial and insurance sectors. As the only African nation to formalise menstruation leave, Zambia provided a distinctive context to explore the operation of gender-specific workplace policies within postcolonial African organisational settings. The research drew on qualitative data from 32 interviews with employees and managers across four organisations, revealing several key findings.

Firstly, organisational size significantly shaped implementation approaches, with large organisations employing bureaucratic processes, medium organisations adopting hybrid practices, and small organisations favouring Ubuntu-inspired community-oriented methods. Secondly, a *leadership policy paradox* emerged, where senior women often avoided using menstruation leave to safeguard their professional credibility, thereby perpetuating stigma around its use. Thirdly, varying levels of cultural integration were observed, ranging from surface-level adoption to deeply embedded practices that reflected local values.

Women adopted different strategies to navigate the policy, balancing health needs with career aspirations. These strategies highlighted the complicated interplay between professional identity, organisational context, and cultural dynamics. While the policy aimed to support women's workplace participation, its impact on recruitment and retention was nuanced, particularly when compounded by other types of leave such as maternity, sick, and study leave. Implementation challenges were shaped by implicit biases, practical difficulties, and societal stigma.

This research contributes to the nascent discourse on menstruation leave policies in the Global South by extending Acker's (1990, 2006) theory of gendered organisations to postcolonial African contexts and applying the social ecological model to workplace policy

implementation. It offers practical recommendations for organisations, including the development of size appropriate implementation guidelines. The findings underscore the need for gender-specific policies to move beyond symbolic compliance, fostering genuine workplace equity.

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## ACKNOWLEDGEMENTS

I am deeply grateful to my supervisor, Dr. Preeya Daya, for believing in this work and for her invaluable guidance, expertise, and generosity. Your insights and unwavering support sustained me, especially in moments when I felt I could not move forward. You showed up and reminded me, 'You've got this!' Thank you, Dr. Preeya Daya.

To Dr. John Fay, thank you for your ideas, encouragement, and those much-needed coffee conversations. Especially in the early stages of my thesis. Your support was instrumental in bringing this dissertation to completion.

I extend my heartfelt gratitude to all the organisations and individuals who shared their stories with me. Thank you for your time, trust, and openness.

To my dear friend and thinking partner, Nic Richter, thank you for walking this journey with me, sharing both laughter and tears, always there with quick wit and your own experiences. I cannot imagine doing this MPhil without you. I am equally grateful to my siblings, Arnold Sampa Chirwa and Grace Bwalya; you kept me motivated and grounded. And to my entire family, thank you for your unwavering love and support.

A special thank you to my MPhil classmates and to my incredible friends, Ines Niragira, Sharon Mambwe, and Misozi Mkandawire, for your patient listening, encouragement, and belief in me. You are the best.

To my mothers, Alice Chilupula, Beverly Arthur, and Virginia Hemsworth; your love and strength have always inspired me.

To my husband and partner, Mark, thank you for believing in me and for sacrificing so much of our family time so I could pursue this research. Your unwavering love and encouragement mean everything to me.

And finally, to Woukira and Kai, thank you for letting Momma write her paper. This is for you.

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## ACRONYMS AND ABBREVIATIONS

ASA	Attraction-Selection-Attrition
CEO	Chief Executive Officer
CIM	Complex Interplay Model
FMLA	Family and Medical Leave Act
FWA	Flexible work arrangements
HR	Human Resource
MD	Mother's Day
MHH	Menstrual Health and Hygiene
MHM	Menstrual Hygiene Management
MLSS	Ministry of Labour and Social Security
NGOs	Non-governmental Organisations
NHS	National Health Service
PMDD	Premenstrual dysphoric disorder
SADC	Southern African Development Community
SEM	Social Ecological Model
SIGI	Social Institutions and Gender Index
UNFPA	United Nations Population Fund
UNICEF	United Nations International Children's Emergency Fund
WEF	World Economic Forum
WFC	Women for Change
WinS	WASH in Schools

## CHAPTER 1: INTRODUCTION

### 1.1 Background of Study

Gender equality in the workplace remains a significant challenge worldwide. At the current pace, it will take approximately 132 years to achieve full equality in economic participation between men and women (World Economic Forum (WEF), 2022). Women's underrepresentation in senior positions is a persistent issue globally, but the reasons behind it often vary according to local contexts (Jayachandran, 2015, 2021). It is therefore important to examine these reasons closely within specific settings.

This study sought to explore how Zambia's unique menstruation leave policy, known locally as *Mother's Day*, affects the hiring and retention of women working in the financial and insurance sectors. Zambia is currently the only African country with a formal policy allowing women one day off per month to manage menstrual health without needing to provide medical documentation or prior notice (Price, 2021). Although uncommon internationally, this policy recognises the impact menstruation and women's role as primary caregivers can have on women's health, productivity, and comfort in the workplace.

While *Mother's Day* might seem supportive, its actual effects are complex. The policy intersects with several factors, including health considerations, cultural attitudes, gender norms, organisational practices, and economic constraints. Therefore, this policy offers an important opportunity to explore how initiatives designed to support women can sometimes unintentionally lead to exclusion or stigma, depending on how they are interpreted and implemented.

It is worth noting that Zambia has made noticeable progress in reducing gender inequalities at work and is among the top three African countries for improving women's representation in senior roles (WEF, 2022). Despite this, Zambia ranks only 62nd globally for overall gender equality, indicating that significant disparities persist, particularly regarding access to formal employment, equal pay, and leadership opportunities (Kabwe, 2020).

The financial and insurance sectors are particularly important for this study because, despite strong overall female participation in Zambia's service industry, women make up only 43% of employees in finance and insurance (Ministry of Labour and Social Security (MLSS), 2020). Even fewer hold senior positions. This research aimed to understand how the menstruation leave policy affects women's opportunities to join, stay in, and advance within these sectors.

The main research question guiding this study is:

**How does the menstruation leave policy (Mother's Day) influence the recruitment and retention of women in Zambia's financial and insurance sectors?**

To answer this, supporting sub-questions examine how organisations implement the policy, how women experience and manage its use, and how employers' perceptions affect hiring decisions and women's career progression. The study employs qualitative methods, including interviews with employees, managers, and human resource professionals from four organisations.

The study uses a combination of theoretical frameworks to provide a structured way to understand the policy's impacts. These include feminist organisational theory, postcolonial theory, inclusive innovation, and a *Complex Interplay Model* (CIM) developed specifically for this study.

Feminist organisational theory and postcolonial theory help explain how hidden gender biases and historical power dynamics continue to shape workplaces. They reveal how organisational norms, cultural values, and policies can unintentionally disadvantage women. Economic perspectives help examine how employers assess the costs and benefits of policies like menstruation leave, especially where productivity and performance are critical.

Inclusive innovation is used here as a lens to ask important questions: Who benefits from policies designed for inclusion, and who might they exclude? This helps to identify whether women truly benefit from the policy or whether certain groups may be left out or marginalised.

Finally, the CIM helps to analyse how formal policies interact with organisational hierarchies, workplace cultures, and broader social attitudes. Supported by the Social Ecological Model (SEM), it allows the research to clearly illustrate how women's experiences are shaped by multiple factors and how their experiences, in turn, influence the organisations they work for.

By focusing specifically on Zambia's experience, this study provides detailed insights into how policies intended to support women can have both positive and negative outcomes. It contributes to a broader discussion on workplace inclusion, and the day-to-day experiences of women in employment.

## **1.2 Research Area and Problem Statement**

Gender inequality remains a persistent global challenge, though its specific manifestations vary across regions and industries (Villarroya & Barrios, 2022; Ridgeway, 2011). While international discussions on workplace barriers for women are well established, limited research explores how local policies, cultural norms, and employer perceptions shape professional experiences in Zambia. This gap is particularly evident in studies on menstruation leave, where existing research predominantly focuses on Asian and Western contexts (Barnack-Tavlaris et al., 2019). The absence of African perspectives limits our understanding of how menstruation leave functions in workplaces where discussions around menstruation are often stigmatised.

In addition, workplace policies aimed at supporting women can sometimes have unintended consequences. Menstruation leave, which grants women time off during their menstrual cycle, is widely debated. Advocates argue that it acknowledges biological differences and fosters workplace inclusivity, while critics caution that it may reinforce gender stereotypes or contribute to hiring biases. As the only African country with a formalised menstruation leave policy, Zambia offers a unique opportunity to explore these debates within the realities of an African corporate environment.

The financial and insurance sectors provide an important setting for this investigation. While women's participation in these industries is relatively high, their representation in leadership and well-paying jobs remains disproportionately low (MLSS, 2020). By analysing how Zambia's Mother's Day policy operates within this sector, this research aimed to uncover how menstruation leave policies influence women's career trajectories, employer attitudes, and broader workplace dynamics. This study contributes to both gender equity scholarship and menstruation leave policy perceptions, offering insights into how menstruation leave can be better structured to achieve its intended benefits without reinforcing the very inequalities it seeks to consider.

### ***1.2.1 | Policy Context: Existing Workplace Discourse on Menstruation Leave in Zambia***

While there is limited formal research on how menstruation leave is applied in Zambia and the world, Baird et al. (2021, p. 189) note that: 'There are no cross-national client-facing roles global studies of menstrual leave and there is little discussion of its use'. This absence of rigorous data is particularly striking in African contexts, where such policies may intersect with deeply rooted social norms and workplace hierarchies

In Zambia, informal discussions among Human Resource professionals, employees, and online communities reveal that the policy commonly referred to as Mother's Day, is often debated and unevenly applied. Anecdotal accounts suggest concerns about fairness, misuse, and professional repercussions. Screenshots from workplace WhatsApp groups and online platforms (Figures 1.1, 1.2, and 1.3) illustrate some of these ongoing debates, such as confusion about policy boundaries, employer discretion, and perceptions of gender bias.

For example, in one HR discussion thread (Figure 1.1), participants questioned whether menstruation leave requests could be denied or required advance notice. Others noted that despite legal recognition, the policy is rarely tested, largely due to cultural sensitivities surrounding menstruation.



**Figure 1.1: WhatsApp conversation in HR group**

Source: Author's Own: WhatsApp group

In another conversation (Figure 1.2), frustrations emerged around the perceived overuse of the policy and its interaction with other leave types, such as bereavement or study leave. One participant remarked that the policy "makes women more expensive to hire," raising broader concerns about unintended consequences.



**Figure 1.2: Employers expressing frustrations informally with the Mother's Day leave**

Source: Author's Own WhatsApp group

Public online forums (Figure 1.3) reflect similar tensions. Some commenters argue that menstruation leave, though well-meaning, may unintentionally reinforce stigma or discourage women from using it. Others advocate for broader, gender-neutral wellness leave policies as more equitable alternatives.



**Figure 1.3: Online chats discussing menstruation leave**

Source: Reddit (2024)

While these perspectives do not constitute formal evidence, they offer a valuable window into lived realities and contested views. They also highlight the urgent need for systematic, empirical research to explore how the policy is actually functioning in the workplace, and what it means for women's recruitment, retention, and advancement. This study seeks to fill that gap.

### 1.3 Significance of the Research

This study seeks to offer empirical insights into how Menstruation Leave functions within African corporate cultures.

A key area of investigation is the unclear impact of the policy on women's employment. While menstruation leave is designed as a supportive measure, its unintended consequences on women's career progression remain uncertain. This study examines whether the policy facilitates or hinders women's participation in Zambia's formal employment sector.

In addition, the study explores the tension between cultural beliefs and professional expectations. Traditional attitudes towards menstruation may influence how the policy is perceived and applied in modern workplaces. Understanding these cultural and professional dynamics is crucial for assessing how effectively the policy integrates into contemporary employment settings.

Another critical aspect is the variation in organisational implementation. There is a significant lack of empirical evidence on how different types of organisations enforce menstruation leave and what best practices might look like. This study investigates disparities in policy application across workplaces and their implications for effectiveness.

Furthermore, the research assesses the impact on women's leadership trajectories. While menstruation leave aims to support women in the workplace, it is essential to explore whether it inadvertently affects their career advancement, particularly in reaching leadership positions.

By raising these key issues, this study goes beyond merely analysing Zambia's Menstruation Leave policy known as Mother's Day; it contributes to a broader re-evaluation of how African workplaces adopt and implement gender-sensitive policies. The findings will help offer insights that can be considered in future policymaking, ensuring that such interventions promote inclusivity and fairness without unintentionally reinforcing existing gender inequalities.

#### 1.4 Aim of the Dissertation

This research aimed to examine, through an inclusive innovation lens, how innovative workplace policies, specifically Zambia's menstruation leave policy, influence gender equality in the financial and insurance sectors. While such a policy is often introduced with inclusionary intentions, its implementation and effects require careful examination to understand whether the policy truly promotes inclusion or inadvertently creates new barriers to women's professional advancement.

The study seeks to make three key contributions:

1. **Theoretical:** Advance understanding of how gendered innovative workplace policies interact with cultural factors to influence gender equality, contributing to menstruation leave policies and workplace literature. This includes examining the philosophical tension between accommodating biological differences and achieving workplace equality.
2. **Empirical:** Provide evidence-based insights into the effects of menstruation leave policies on women's recruitment and retention in Zambia's financial and insurance sectors, dealing with a significant gap in existing research.
3. **Practical:** Inform policymakers and employers about the complex implications of gender-specific workplace policies, supporting more effective approaches to promoting workplace equality.

On a personal note, this study is motivated by my quest to contribute to equality in hiring practices because I hope for a fairer world for my daughter, Woukira Frankie Hemsworth.

#### 1.5 Research Question and Scope

Edmondson and McManus (2007) assert that good research hinges on asking the right question rather than merely choosing the right method. Therefore, this qualitative, exploratory study is guided by the following question:

## **How does the menstruation leave policy (Mother's Day) influence the recruitment and retention of women in Zambia's financial and insurance sectors?**

This question explores how a gender-specific policy, though intended to be supportive, functions within organisational structures, cultural attitudes, and gender dynamics that influence its effectiveness. The following sub-questions help examine this interplay systematically:

1. How do organisations of different sizes implement and adapt the menstruation leave policy? Exploring organisational structures: This question examines how implementation approaches vary across different organisational contexts, from bureaucratic processes in large organisations to informal systems in smaller workplaces. It investigates how organisational size and structure fundamentally shape policy accessibility and effectiveness.
2. What is the profile of women who utilise the policy, and what factors influence their decision to do so? User innovation and gender dynamics: This question explores how workplace hierarchies, career stages, and professional expectations influence policy utilisation. It pays particular attention to the leadership policy paradox, where senior women may avoid using the policy to maintain professional credibility.
3. How do women perceive and strategically navigate the policy within their professional contexts? Social innovation: This question investigates how women interpret the policy's purpose and develop strategies to use it while balancing workplace relationships and cultural expectations. It examines how stigma and traditional perspectives on menstruation influence women's decision-making about policy use.
4. What are the personal and professional implications for women who utilise the policy? Impact Assessment: This question examines how policy use affects women's career trajectories, workplace relationships, and professional identities. It explores the tension between the policy's health benefits and its potential career implications.
5. How do employer perceptions and implementation approaches affect the policy's effectiveness? Innovation implementation: This question investigates how employer

attitudes toward the policy shape implementation approaches and hiring practices. It explores how organisational priorities, cultural contexts, and gender expectations collectively determine whether the policy supports or hinders women's workplace participation.

This study explored how the Mother's Day policy affects employees, employers, and industry stakeholders, focusing on the financial and insurance sectors, where corporate policies and cultural norms strongly intersect. These industries employ many women but remain male dominated at leadership levels, making them ideal for examining whether menstruation leave supports or hinders career progression.

Using an inclusive innovation lens, this research examined how policy intent aligns with workplace realities, assessing whether menstruation leave helps recruit and retain women or unintentionally reinforces professional disadvantages.

### **1.6 Positionality and Reflexivity**

In qualitative research, the researcher's positionality, comprising background, identity, and subjectivity, shapes study design, data interpretation, and analytical lens (Rose, 1997). My background, identity, and professional experiences inevitably shaped how I approached this study, from framing the research questions to interpreting the data. Recognising this influence is critical for the researcher, particularly when examining gender, workplace policies, and social inequalities.

As a Zambian woman with professional experience in International Development and Social Behaviour Change, I bring both insider and outsider perspectives to this study. Having engaged with diverse stakeholders, from policymakers to frontline workers, I am familiar with the intersection organisational structures, and cultural norms that influence workplace gender dynamics. This positionality facilitates nuanced insight into the contexts within which menstruation leave policies are enacted and experienced. My personal experience as a working woman in Zambia means I have witnessed firsthand the cultural taboos surrounding

menstruation and the workplace challenges women face when managing menstrual health needs. This lived experience provided valuable context for understanding participant responses but also required careful consideration to avoid projecting my own experiences onto the data.

### **Analytical Bias and Reflexive Considerations**

My feminist and decolonial theoretical orientations create specific analytical predispositions that warrant deeper examination. These perspectives incline me toward critical examinations of power, privilege, and structural inequality in workplace settings, potentially leading me to interpret data through a lens that emphasises systemic oppression and gender-based discrimination. While these frameworks provide valuable analytical tools, they also risk overemphasising negative aspects of policy implementation while potentially undervaluing genuine organisational efforts toward gender inclusion.

My professional background in social behaviour change also shapes how I conceptualise policy effectiveness and implementation challenges. Having worked on various development initiatives, I tend to approach policy analysis with an implementation science lens, focusing on barriers and facilitators rather than purely theoretical considerations. This orientation influenced how I framed interview questions and may have led me to prioritise practical implementation concerns over broader theoretical implications during data collection.

Additionally, my position as a researcher conducting this study for academic purposes created a power dynamic with participants that required ongoing navigation. Some participants, particularly those in senior HR positions, may have provided socially desirable responses about their organisation's commitment to gender equality, while others might have been more candid about challenges, potentially influenced by their perception of my research agenda.

### **Reflexivity in Data Analysis**

Throughout the data analysis process, I employed several reflexive practices to mitigate potential bias. During the coding phase, I maintained detailed reflexive memos documenting my initial reactions to participant responses and questioning whether my interpretations were grounded in the data or influenced by my theoretical predispositions. For instance, when participants described challenges with policy implementation, I consistently asked myself whether I was attributing these to systemic gender discrimination or whether other organisational factors might be at play.

I also engaged in member checking with selected participants to validate my interpretations and ensure that my analysis accurately reflected their intended meanings. This process revealed instances where my feminist lens had led me to interpret certain responses as indicative of gender bias when participants had intended to convey operational challenges unrelated to gender. These revelations prompted me to revisit my analytical approach and develop more nuanced interpretations that acknowledged the complexity of workplace dynamics beyond gender considerations.

Furthermore, I maintained a research journal throughout the data collection and analysis phases, documenting moments of discomfort, surprise, or strong emotional reactions to participant responses. These reflexive notes became crucial analytical tools, helping me identify when my personal experiences or theoretical commitments might be influencing my interpretation of the data.

Positionality, therefore, is not a limitation but a lens through which this research is conducted. By continuously reflecting on my role in the process and actively interrogating my analytical assumptions, the study aims to amplify participant voices, challenge dominant narratives, and contribute meaningfully to ongoing discussions on inclusive workplace policies such as Zambia's Mother's Day policy while maintaining analytical rigour and transparency about the subjective nature of qualitative research interpretation.

## 1.7 Definition of Key Terms

This section highlights shared definitions of concepts critical to the research on menstruation leave policies and gender equality in the workplace.

**Menstruation Leave Policy** - A workplace policy that grants female employees the right to take leave during their menstrual cycle. This leave is designed to accommodate menstrual health-related needs and varies in its implementation across different countries and organisations. In Zambia, it is commonly referred to as Mother's Day and considers the role of women as primary caregivers, allowing them to take one day off per month without medical justification or prior approval.

**Inclusive Innovation** – Refers to the development and implementation of policies, products, and services that actively involve and benefit marginalised or underrepresented groups. It seeks not only to extend the reach of innovation but also to ensure these groups have agency and equitable opportunities to participate in and shape innovation processes. (Heeks et al., 2013). In the context of this study, inclusive innovation highlights policies that promote gender inclusivity and work towards equal access and outcomes in the workplace

**Workplace Gender Equality** - The principle that all employees, regardless of gender, should have equal access to opportunities, resources, promotions, and benefits in the workplace, including fair compensation, leadership representation, and elimination of gender-based discrimination.

**Recruitment** - Recruitment refers to the process of attracting, selecting, and hiring employees for an organisation. In the context of this study, it explores whether menstruation leave policies influence employers' willingness to hire women.

**Retention** - Refers to an organisation's ability to keep employees over time. The study examines how menstruation leave policies impact on female employees' decisions to remain in their jobs and whether these policies affect their career growth.

**Organisational Policy Implementation** - The process by which workplace policies, such as menstruation leave, are applied, and enforced within organisations. This includes how policies are communicated, how consistently they are applied, and whether employees feel encouraged or discouraged from utilising them.

**Labour Laws and Employment Regulations (Zambia Specific)** - Refers to the Employment Code Act of 2019: The national labour law that governs employment practices in Zambia, including provisions on gender equality and workplace rights.

**Menstruation Leave in Zambian Labour Law:** Menstruation leave is a well-established practice in Zambia under the informal policy of Mother's Day, under section 47 of the Employment Code Act of 2019 and is recognised by many employers but lacks standardised enforcement mechanisms.

By defining these key terms, this section ensures that critical concepts are clearly understood before delving into the detailed analysis in subsequent chapters.

## 1.8 Research Assumptions

This study is influenced by several key assumptions regarding the implementation and impact of menstruation leave within Zambia's financial and insurance sectors.

It is assumed that organisations in these sectors have either implemented or are in the process of implementing menstruation leave as mandated by the 2019 Employment Code. However, the approach to implementation is expected to vary depending on organisational size, structure, and internal policies. These variations are examined in the study's findings.

Cultural beliefs and attitudes toward menstruation are also expected to play a significant role in shaping workplace dynamics. In professional environments, particularly in the financial and insurance industries, these cultural perceptions may create unique challenges for policy implementation.

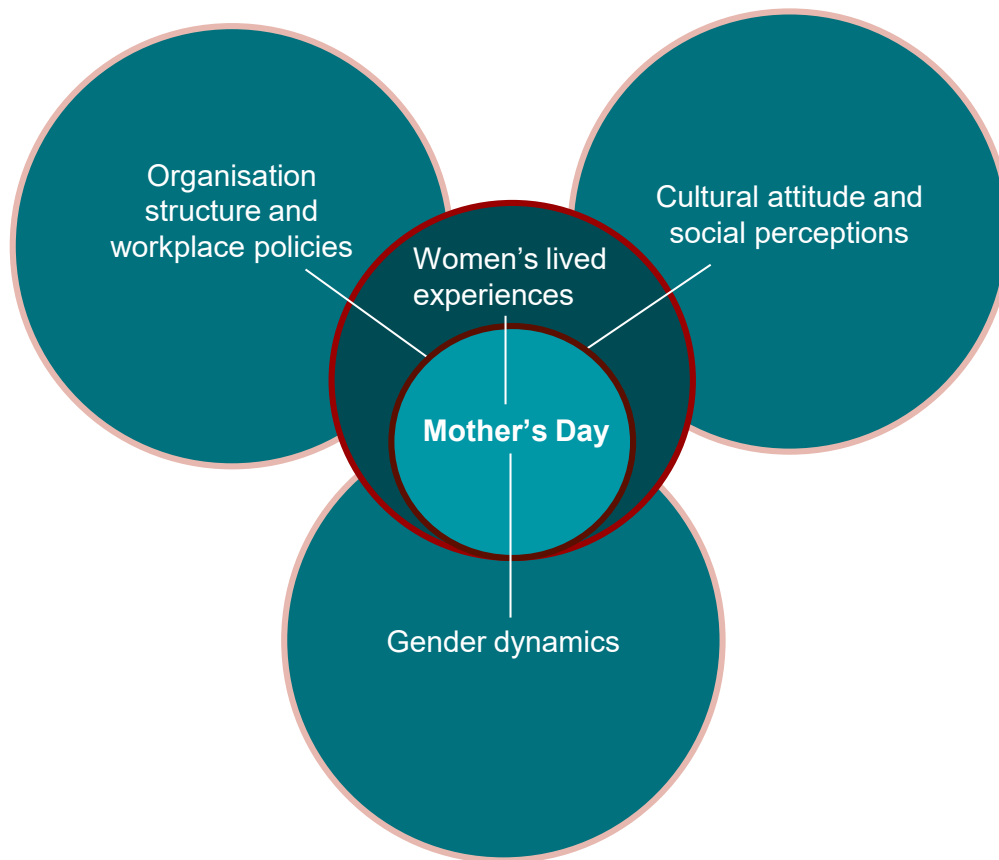
Moreover, organisational culture is likely to influence how the policy is perceived and utilised by employees. Another assumption concerns gender dynamics and career progression. Prevailing gender norms are expected to influence women's participation in the workforce, affecting both their willingness and ability to utilise menstruation leave. Policy use is perceived to have potential implications for leadership opportunities. In some cases, the policy may support women's professional growth, while in others, it may reinforce existing barriers to career progression.

By exploring these assumptions, this study aims to provide a nuanced understanding of how menstruation leave is integrated into workplace practices and its broader implications for gender equity in Zambia's corporate sector.

### **1.9 Conceptual Framework: The Complex Interplay Model (CIM)**

This research is guided by a conceptual framework developed by the author to analyse the effects of Zambia's Mother's Day policy. The CIM places both Zambia's Mother's Day policy and the lived experiences of working women at the centre, recognising that the impact of a policy cannot be fully understood without examining how it is interpreted, navigated, and negotiated by the very people it is meant to support.

The CIM (Figure 1.4) illustrates the core argument of this study: that organisational structures, cultural attitudes, and gender dynamics interact in complex ways to either enable or constrain women's recruitment, retention, and advancement in Zambia's financial and insurance sectors. It shows how well-intentioned policies like Mother's Day can offer vital support while simultaneously creating new barriers, depending on the environment in which they are implemented.



**Figure 1.4: The Complex Interplay Model: Zambia's Mother's Day Policy**

*Source: Author's own*

The model consists of three interlinked dimensions:

**Organisational Structures and Workplace Policies:** How the size and formality of an organisation shape the implementation of the policy. In large institutions, formal processes may standardise access but also lead to stigma or rigidity. In smaller or informal settings, implementation may be inconsistent or unclear.

**Cultural Attitudes:** What social norms, taboos, and postcolonial gendered expectations influence how menstruation and menstrual leave are understood. This includes how language, silence, or euphemisms around menstruation may either empower or discourage women from using the policy.

**Gender Dynamics:** How workplace hierarchies and leadership expectations affect policy use. The leadership policy paradox captures how senior women may feel pressured to avoid using the policy, thereby shaping informal norms and expectations among their peers or junior staff.

At the centre of the model are the lived experiences of women. These experiences offer a lens through which the policy's value and challenges are made visible. Women's personal decisions about using the policy are shaped by their health needs, perceptions of stigma, organisational culture, and peer dynamics. These experiences ground the study in real-world practice, ensuring that analysis stays connected to how policies are lived, not just how they are designed.

The framework is informed by feminist organisational theory (Acker, 1990; Calás & Smircich, 2006), which explores how institutions reproduce gendered power, and cultural policy implementation theory (Matland, 1995), which explains how ambiguity and conflict shape how policies are enacted in practice. The feminist organisational theory shaped the approach to understanding women's experiences, through in-depth interviews that explored how gender dynamics shaped policy use. This ensured that the study remained sensitive to the gendered power dynamics influencing women's interactions with the policy in their workplaces (Hesse-Biber, 2012).

This conceptual model helped guide the study's design, from the formation of research questions to the structure of interviews and focus groups, and throughout the analysis. It positions Zambia's Mother's Day policy not as a stand-alone initiative, but as part of a dynamic system shaped by social norms, workplace structures, and individual experiences.

### **1.10 Organisation of the Dissertation**

This study is structured into six key chapters, each building upon the one before providing an analysis of the menstruation leave policy in Zambia's financial and insurance sectors. The organisation of the study ensures a logical progression from context setting to data analysis and policy recommendations.

**Chapter 1: Introduction** - This chapter introduces the study by providing background information on workplace gender equality and menstruation leave policies. It presents the research problem, objectives, research questions, significance, scope, and overall structure of the study. This chapter set the stage for understanding the relevance of the study in dealing with workplace inclusivity in Zambia's financial and insurance sectors.

**Chapter 2: Literature Review** - Chapter 2 critically examines existing literature on menstruation leave policies and gender disparities in the workplace. It reviews international and regional perspectives on workplace gender policies and identifies gaps in the literature that this study seeks to consider.

**Chapter 3: Research Methodology** - This chapter details the research design and methodology used to collect and analyse data. It describes the study's qualitative approach, sampling methods, data collection techniques (such as interviews), and ethical considerations. The chapter also outlines and relevant theoretical frameworks, including inclusive innovation and organisational theory. It also highlights the data analysis procedures applied to ensure rigour and reliability in the findings.

**Chapter 4: Findings and Analysis** - Chapter 4 presents the study's findings based on the data collected. It provides an analysis of how menstruation leave policies are implemented in Zambia's financial and insurance sectors, employee and employer perceptions, and the broader implications of these policies on gender inclusivity.

**Chapter 5: Discussion** - Chapter 5 discusses the findings in the context of the research objectives and literature review. It reflects on the implications of menstruation leave policies for workplace gender equality, offering policy recommendations and suggestions for further research. Themes emerging from the findings chapter are discussed in relation to the theoretical frameworks explored in the literature review.

**Chapter 6: Conclusions** - The last chapter of the study concludes by summarising key insights and emphasising the broader significance of workplace inclusivity in Zambia and beyond.

### 1.11 Chapter Conclusion

This chapter introduced the study by situating Zambia's Mother's Day policy within broader efforts to promote gender equality in the workplace. While the policy is framed as a progressive step towards recognising women's health needs and their role as caregivers, it operates within a complex web of organisational structures, cultural attitudes, and gender dynamics. These interacting forces have the potential to either support or undermine women's recruitment, retention, and career advancement, particularly in Zambia's financial and insurance sectors, where leadership remains largely male dominated despite relatively high female participation overall in the sector.

The chapter highlighted the need for locally grounded research that explores how well-intentioned gender-specific policies function in practice. Drawing on gaps in existing global and regional literature, it emphasised that policies like menstruation leave cannot be fully understood without examining the lived experiences of the women they are designed to support, as well as the perspectives of employers responsible for implementing them.

By outlining the research problem, questions, and conceptual framework, this chapter established the foundation for the study's analytical approach. The CIM developed for this research reflects the central argument: that policy outcomes are shaped by the intersection of formal structures and informal norms, and that inclusivity must be evaluated not only by policy presence but by how such policies are experienced and applied.

In doing so, the chapter sets the stage for a deeper exploration of Zambia's menstruation leave policy, guided by a commitment to amplifying women's voices, challenging assumptions, and contributing to more inclusive and equitable workplace practices across the continent and beyond.

## CHAPTER 2: LITERATURE REVIEW

### 2.1 Introduction

This chapter examines global and local views on menstruation leave policies, focusing on Zambia's Mother's Day policy and how it affects recruitment, retention, and career growth in the financial and insurance sectors. By studying trends across different contexts, this literature review identifies key patterns in policy design, implementation, and workplace experiences, placing Zambia's approach within wider discussions on gender-responsive work policies.

To provide a thorough analysis of menstruation leave policies, this review is organised into these sections:

- **Conceptualising Menstruation Leave** - Defines menstruation leave policies, examining how they developed and how they differ from other gender-responsive workplace policies.
- **Historical and Global Perspectives** - Traces how menstruation leave policies evolved worldwide, from early examples in Russia and Japan to recent changes in Spain and Indonesia, highlighting key trends and policy trade-offs.
- **Menstruation Leave Discussions in Africa** - This section of the review provides insight into some of the discussions that have happened on the continent with regard to the implementation of menstruation leave, highlighting viewpoints from a continental point of view.
- **The Zambian Context** - Provides an analysis of Zambia's Mother's Day policy, discussing its history, implementation challenges, and cultural significance; comparing it to policies in other countries.
- **Menstruation Leave and Workplace Outcomes** - Investigates whether menstruation leave helps or hinders careers, analysing how it interacts with broader gender-based workplace policies and perceptions of women's professional reliability.

- **Menstruation Stigma and Workplace Culture** - Explores how cultural attitudes toward menstruation shape policy effectiveness and workplace participation, with a focus on Zambia's unique social and cultural context.
- **Debates and Conflicting Viewpoints** - Reviews contrasting arguments about menstruation leave, weighing concerns related to gender equality, workplace fairness, and economic feasibility.
- **Alternative Approaches** - Examines other strategies for accommodating menstruation at work, such as flexible work arrangements, better workplace facilities, and gender-neutral health policies.
- **Research Gaps and Future Directions** - Identifies critical areas for further research, particularly the long-term economic and social effects of menstruation leave policies in African workplaces.
- **Theoretical frameworks-** Reviews the integrated theoretical frameworks used throughout the research.

### ***2.1.1 Contribution and Significance of the Review***

By bringing together global and Zambian perspectives, this literature review provides a nuanced understanding of how menstruation leave policies work within different labour markets. It examines how cultural perceptions, workplace structures, and legal frameworks shape how people use, and view menstruation leave. By contributing to discussions on gender-sensitive labour policies, this review highlights the importance of context-specific policy design.

Ultimately, this review seeks to answer a key question: Does Zambia's menstruation leave policy promote workplace gender equity, or does it create unintended professional disadvantages for women?

The insights from this review aim to contribute to greater awareness and understanding of menstruation leave policies, particularly from a Global South perspective.

## 2.2 Conceptualising Menstruation Leave

Menstruation remains a difficult topic in work environments, especially in African workplaces where it connects with deep cultural taboos and gender norms. In many societies, people view menstruation as private or shameful, which leads to few workplaces supporting it and creating barriers to gender equality (Bobel et al., 2020). In February 2023, Kenyan Senator Gloria Orwoba entered parliament wearing trousers with period stains to raise awareness about menstrual stigma. Her colleagues forced her to leave, calling her actions inappropriate (Gatonye, 2023). This demonstrates how stigma around menstruation continues, reflecting wider problems in workplaces where menstrual health is often ignored or misunderstood (Karin, 2021).

In response, some governments and organisations have created menstruation leave policies to support workers with severe menstrual symptoms. These policies let menstruating employees take time off work without penalties, aiming to deal with biological needs while promoting workplace inclusion (Arora & Nigam, 2018). However, many people debate these policies, worrying about effects on productivity, gender discrimination, and possible harm to women's career progress (Widiss, 2023).

While research on menstrual health has grown significantly in the Global South, formal menstruation leave policies remain understudied, particularly in Africa. There is little empirical research on how these policies are implemented, used, and viewed in different workplaces. (Barnack-Tavlaris et al., 2019). This is an important research gap, as Zambia's approach represents a rare example of official menstrual leave in an African context. By attending to these gaps, this review helps deepen understanding of whether menstruation leave policies help remove workplace barriers or accidentally reinforce gender disadvantages.

Menstruation leave is a workplace policy that lets people who menstruate take time off work to manage period discomfort without losing pay or worrying about job security (Arora & Nigam, 2018). These policies vary widely across countries, some offer paid leave (like Zambia,

Indonesia, and Spain), while others provide unpaid or optional leave (such as Japan and Taiwan) (Barnack-Tavlaris et al., 2019).

While often seen as a gender policy, definitions of menstruation leave have become more inclusive over time. Early policies were mainly for women in physically demanding jobs (Dan, 1986), but newer research recognises that not all people who menstruate identify as women (Baird et al., 2021; Bobel et al., 2020). Hennegan et al. (2021) support a broader definition that includes all menstruators, including transgender and non-binary individuals.

Despite these evolving definitions, different cultures name and frame these policies in various ways. In Zambia, the policy is called Mother's Day, linking periods to reproduction and caregiving, rather than seeing it as simply a biological process (Baird et al, 2021). This name suggests the policy is shaped by traditional gender roles, reinforcing the idea that women's main responsibilities go beyond the workplace. Understanding these cultural framings helps us assess how menstruation leave policies are received and experienced in different settings.

### ***2.2.1 Medical Foundations of Menstruation Leave Policies***

Menstrual health conditions are common yet often overlooked in workplace health policies, despite their significant effects on employees' physical, emotional, and professional wellbeing (Karin, 2021). Disorders such as dysmenorrhoea, menorrhagia, endometriosis, and premenstrual syndrome (PMS) affect a large proportion of menstruating individuals, (Karin, 2021; Sivadasan et al., 2014; King, 2020). These conditions can lead to physical pain, fatigue, mood changes, and disruptions in concentration. The symptoms can impair daily functioning and contribute to both absenteeism and presenteeism in the workplace (Lacovides et al., 2015).

Dysmenorrhoea, or painful menstruation, is one of the most common menstrual disorders. It affects between 45% and 90% of menstruating individuals, with moderate to severe pain reported in about 30% of working women (Sivadasan et al., 2014). Symptoms often include abdominal cramps, fatigue, headaches, and difficulties focusing, making it particularly challenging to perform tasks that require sustained attention, such as those in finance, law,

or administration. While exercise is sometimes suggested as a form of symptom relief, evidence for its effectiveness is limited (Daley, 2009). Clinical studies have found that dysmenorrhoea contributes to reduced productivity because of presenteeism, working while unwell, which may last several days per cycle (Lacovides et al., 2015).

Menorrhagia, characterised by excessive menstrual bleeding, can result in chronic fatigue, iron deficiency anaemia, and frequent interruptions for personal care. In workplaces where extended concentration and uninterrupted client engagement are expected, these symptoms can disrupt productivity and reduce participation in key responsibilities, such as attending meetings or travelling for work (Smith, 2018).

Endometriosis is a chronic inflammatory condition marked by the growth of uterine tissue outside the uterus. It causes severe pelvic pain, fatigue, and heavy bleeding. Women with endometriosis often report missing between 10 to 20 workdays per year and experiencing a significant decline in quality of life (Soliman et al., 2017). In competitive corporate environments, this can affect career progression, with women facing missed opportunities or slower promotion paths owing to unmanaged symptoms.

Premenstrual syndrome and premenstrual dysphoric disorder (PMDD) also play a role in limiting work effectiveness. These conditions can cause irritability, anxiety, mood swings, and difficulty concentrating. Although predictable and cyclical, these psychological symptoms are often overlooked in standard corporate health and wellness programmes (Karin, 2021).

A global study found that around 69% of women reported working through menstrual pain that negatively affected their performance, with 20% saying they perceived a noticeable decrease in the quality of their work (Fourquet et al., 2010). Yet, according to Karin (2021) workplaces are not universally designed to support menstrual needs.

Regarding economic costs, menstrual disorders are linked to both direct expenses (e.g., medical treatment) and indirect costs like lost workdays and reduced efficiency. On average, 1.3 to 1.7 days per month are lost to menstrual-related sick leave, amounting to over 150 million lost workdays annually in countries like the United States (Schoep et al., 2019).

Furthermore, presenteeism, the hidden cost of working while unwell, can result in losses that are several times greater than those caused by absenteeism, especially in knowledge-based sectors.

Evidence from pilot menstruation leave policies in parts of Asia suggests that offering short, flexible menstrual leave (1.2 days per month) can improve overall attendance and morale, while reducing long-term health-related absences. These policies also encourage open conversations around menstrual health, helping to reduce stigma and promote inclusion (Soliman et al., 2017; van Eijk et al., 2019).

In conclusion, menstrual leave policies are supported by a strong medical and economic rationale. Disorders like dysmenorrhoea, menorrhagia, endometriosis, and PMS have tangible effects on employee health, productivity, and participation in the workplace. Recognising menstrual health as part of occupational wellbeing, much like ergonomic adjustments or mental health leave, can help create more inclusive and equitable work environments.

### ***2.2.2 Distinguishing Menstruation Leave from Other Workplace Accommodations***

Having explored the medical rationale underpinning menstruation leave, it is important to clearly differentiate it from other forms of workplace leave and accommodations, as it is often mistakenly conflated with these other types of leave.

#### **2.2.2.1 Menstruation Leave vs. Maternity Leave**

Both menstruation and maternity leave relate to biological processes that affect women in the workplace (Pascua et al., 2023). Maternity leave is a widely recognised policy in many countries, designed to give women time off during pregnancy and after childbirth (Bobel et al., 2020; Florencia et al., 2023). In most formal employment settings, it typically lasts between six and 20 weeks, allowing women time to recover and care for their newborns (International Labour Organization, 2014).

Menstruation leave, by contrast, is a short-term recurring leave offered during the monthly menstrual cycle. It usually amounts to one or two days per month and is not connected to

pregnancy or parenting (Floencia et al., 2023; Hennegan et al., 2021). This type of leave acknowledges that menstruation can cause physical discomfort or pain that may affect productivity and wellbeing at work.

Despite these clear differences, the language used to describe menstruation leave can sometimes create confusion. In Zambia, for example, it is commonly referred to as Mother's Day, a term that reinforces associations with motherhood rather than recognising menstruation as a general aspect of reproductive health (Price, 2021). This framing may unintentionally suggest that only mothers are eligible for the leave, overlooking the needs of women who menstruate but do not have children.

Unlike maternity leave, menstruation leave is far less common and often lacks clear regulation worldwide. While countries like Japan have introduced menstruation leave policies for decades, their usage and impact vary significantly depending on organisational culture and prevailing social norms (Dan, 1986; Japanese Law Translation, 1947).

#### **2.2.2.2 Menstruation Leave vs. Sick Leave**

Research indicates that women tend to have higher rates of short-term sickness absence than men, often due to a combination of physiological and social factors (Østby et al., 2018). Menstruation-related discomfort and work and family conflict issues that disproportionately affect women contribute to this disparity (Bekker et al., 2009; Nilsen et al., 2017; Zhang, 2024). Traditional sick leave policies typically cover illnesses and medical conditions, often requiring medical documentation (Hollingsworth, 2020). However, menstruation is not an illness; it is a normal biological process that can still cause significant pain and reduce productivity (Critchley et al., 2020).

There is ongoing debate about whether menstruation should be treated as a medical issue or recognised as a distinct health need that warrants its own workplace policy. While some argue that menstrual pain should fall under general sick leave provisions, others contend that separate menstruation leave policies are essential to reduce stigma, acknowledge gendered health realities, and promote workplace inclusivity (Bhandari, 2025; Widiss, 2023). In this

context, menstruation leave emerges not just as a health policy but as a tool to support gender equity in both formal and informal work environments.

### **2.2.2.3 Menstruation Leave vs. Flexible Work Arrangements**

Some scholars suggest that instead of specific menstruation leave, workplaces should offer flexible work arrangements that let employees adjust their schedules based on health needs (Levitt & Barnack-Tavlaris, 2020). While flexible work can help, it does not always consider the need for rest and recovery, especially for those with severe period pain (Hollingsworth, 2020).

These comparisons show why menstruation leave remains controversial. Some see it as necessary for gender equity, while others worry it emphasises gender differences in the workplace, potentially affecting hiring and retention.

### **2.2.3 Theoretical Debates: Equity vs. Equality in Workplace Policies**

The debate around menstruation leave is often shaped by differing understandings of equality and equity in workplace policies.

The equality perspective argues that menstruation leave challenges the principle of treating all employees the same, as it provides a benefit exclusive to women. This view is rooted in liberal feminist theory, which advocates for equal treatment under the law and in professional settings, regardless of gender (Acker, 1990). From this angle, policies that treat men and women differently may be seen as reinforcing difference rather than promoting fairness.

In contrast, the equity perspective suggests that fairness is not always achieved by treating everyone identically. Instead, equity recognises that people have different needs and starting points. From this view, menstruation leave helps level the playing field by acknowledging biological realities that uniquely affect women. This perspective draws on feminist standpoint theory, which values the lived experiences of marginalised groups and calls for policies that respond to those experiences (Harding, 2004; Reljanović & Rajić Čalić, 2024).

This tension between equality and equity reflects broader theoretical and practical challenges in workplace gender policies. In some contexts, menstruation leave is seen as progressive and inclusive, while in others, it is viewed as reinforcing stereotypes or undermining workplace cohesion. These diverging views shape not only public debate but also the practical implementation and uptake of such policies.

Ultimately, menstruation leave serves as a case study for how gender-sensitive policies must navigate complex terrain, balancing the need for fairness with the imperative to support diverse experiences in the workplace.

Having established the medical and occupational foundations for menstruation leave, the next section examines how such policies have evolved across different global contexts, with particular attention to their cultural, legal, and institutional drivers.

### **2.3 Historical Origins and Global Perspectives on Menstruation Leave**

Menstruation Leave policies emerged as responses to shifting workplace norms, gender equality movements, and increasing public health awareness (Arora & Nigam, 2018). The earliest known menstruation leave policy dates back to the Soviet Union in 1922, introduced as a measure to safeguard women's health in physically intensive industries. However, this policy was eventually abolished in 1991 owing to criticisms that it unintentionally reinforced gender discrimination by portraying women as less employable (Baird et al., 2021).

In 1947, Japan institutionalised menstruation leave at a national level under its Labour Standards Law, providing unpaid leave for severe menstrual discomfort. Despite the progressive intent of this policy, it suffered low utilisation rates, primarily owing to workplace stigma and women's concerns about career repercussions (Hollingsworth, 2020). South Korea similarly adopted a policy in 2001 offering one unpaid day per month for menstrual leave. However, uptake remains minimal as women in male-dominated workplaces fear negative professional perceptions and appearing weak (Hashimy, 2022).

Indonesia initially introduced two paid days per month for menstrual leave in 1948. Subsequent revisions in 2003 shifted implementation responsibilities to individual employers, resulting in uneven compliance and persistent workplace resistance (Baird et al., 2021; Kridasaksana et al., 2020). Conversely, Taiwan's Gender Equality in Employment Act (2002) integrated menstruation leave within broader sick leave provisions, offering three days of half paid leave per year. This integration aimed to mitigate employer bias and stigma, though challenges in uptake persist owing to cultural barriers (Belliappa, 2018).

Zambia, uniquely positioned in Africa, introduced its policy in 2015, commonly referred to as Mother's Day, allowing women one paid day off per month without medical justification. Despite being viewed as progressive, the policy faces concerns about potential misuse, stigma, and reinforcing traditional gender roles (Gondwe, 2017; Worley, 2017).

Collectively, these international examples reveal common underlying tensions in menstruation leave policies globally. While designed to support gender equity and women's health needs, their success varies significantly based on societal attitudes, implementation strategies, and organisational cultures. This global perspective underscores the complexities inherent in creating inclusive policies that genuinely support women's workplace participation without inadvertently creating new barriers.

### ***2.3.1 Recent Developments: European and Global Trends***

In recent years, menstruation leave policies have gained momentum in Europe and the private sector, reflecting broader gender equity discussions.

Spain became the first European country to introduce state-funded menstruation leave in 2023, allowing 3.5 days of paid leave per month for severe menstrual symptoms. Unlike earlier policies, Spain's model shifts financial responsibility from employers to social security, reducing employer bias in hiring decisions (Widiss, 2023).

In the private sector, companies such as Coexist (UK), Culture Machine (India), and Victorian Women's Trust (Australia) have implemented menstruation leave policies as part of

workplace wellness programmes (Melican & Mountford, 2017). However, uptake remains low, reinforcing the idea that policy success depends on cultural perceptions.

### **2.3.2 Comparative Analysis: Key Policy Variations**

Menstruation leave policies differ significantly in duration, compensation, and implementation mechanisms. A comparative analysis of major policy differences across countries reveals varying approaches to duration, payment structures, funding mechanisms, and challenges.

Japan offers one day per month of unpaid, employer funded leave but faces issues of stigma and declining usage. South Korea provides a similar structure but encounters significant workplace stigma. Indonesia initially offered two days of paid leave monthly, but this has varied over time and led to uneven implementation. Taiwan provides three days per year at half pay, integrated into sick leave (Chang et al., 2011). Spain's newer model offers 3.5 days per month, paid through social security funding, though its impact remains to be fully assessed. Zambia provides one day per month of paid, employer funded leave but faces concerns about potential misuse.

Key observations from this comparative analysis include:

**Employer vs. State Funding:** Employer funded policies (Japan, South Korea, Indonesia, Zambia) face higher resistance owing to economic concerns, while Spain's state-funded model offers an alternative that may mitigate employer hesitancy.

**Cultural Stigma:** Countries with high workplace stigma (Japan, South Korea, Indonesia) report low uptake despite legal protections. Zambia's Mother's Day framing reinforces traditional gender roles, which may affect policy perception and use.

**Policy Integration:** Some country policies (Taiwan) integrate menstruation leave into general sick leave, reducing gender-specific stigma.

These comparative insights help contextualise Zambia’s approach and highlight potential areas for policy improvement.

**Table 2.1: Policy variations**

Country	Duration	Paid/ Unpaid	Funded By	Uptake Trends
Japan	1 day/month	Unpaid	Employer	Very low
Indonesia	2 days/month	Paid	Employer	Inconsistent
South Korea	1 day/month	Unpaid	Employer	Very low
Taiwan	3 days/year	Half pay	Employer	Moderate
Spain	3.5 days/month	Paid	Social Security	Too early to assess
Zambia	1 day/month	Paid	Employer	Mixed; Stigma influences uptake

*Source: Author’s Own compiled from (Baird et al., 2021 ; Barnack-Tavlaris et al., 2019)*

## 2.4 Menstruation Leave Discussions in Africa

Zambia stands as the only African country with a formalised menstruation leave policy enshrined in national law (Hashimy, 2022). This unique position makes Zambia a significant case study within both African and global contexts. Though other African nations have engaged in discussions about menstruation leave, none have yet translated these discussions into legislative action comparable to Zambia’s Mother’s Day policy.

Nigeria’s engagement with menstruation leave offers an instructive comparison to Zambia’s approach. Following Zambia’s implementation of Mother’s Day, public debate emerged in Nigeria about adopting similar provisions (Baird et al., 2021). Media reports by Salau (2017) and Olorunshola (2017) indicate that advocates framed potential menstruation leave as enhancing workplace flexibility and productivity, arguing that it could offer employees opportunities to work more efficiently around their menstrual cycles. This framing resembles Zambia’s approach in emphasising workplace productivity rather than solely focusing on women’s health needs. However, unlike Zambia, these discussions have not yet resulted in

national legislation. Instead, individual companies have taken the initiative, with Klasha becoming the first Nigerian company to offer menstruation leave in 2022 (Okunlola, 2022).

This pattern of corporate-led rather than government-mandated implementation reflects a broader trend across Africa, where workplace gender policies often develop unevenly across public and private sectors. While Zambia's legislation provides nationwide coverage, other African countries show a more fragmented approach with individual organisations establishing policies independently of national frameworks.

North African developments offer another important comparison. Cairo based digital marketing firm Shark and Shrimp became the first company in the Middle East to introduce menstruation leave in April 2019, responding to a public campaign by Egyptian journalists advocating for a national policy (Oppenheim, 2019; The New Arab, 2019). The implementation faced significant opposition, with critics claiming that: 'Maternity leave, one hour break to breastfeed, and now menstrual leave. Why are they even working? They're taking away men's opportunities' (The New Arab, 2019). This resistance reveals common cross-cultural challenges in implementing menstruation leave, with concerns about preferential treatment and job competition appearing consistently across different African contexts, including Zambia.

Comparing these approaches to Zambia's nationwide policy highlights several important distinctions in how African countries approach menstruation in the workplace:

1. **Implementation mechanisms:** While Zambia opted for national legislation, other African countries have seen workplace specific policies developed at organisational rather than governmental levels.
2. **Policy framing:** Zambia's Mother's Day terminology links menstruation to motherhood and caregiving roles, whereas Nigerian and Egyptian discussions have more explicitly framed the issue as menstruation leave, potentially reflecting regional variations in cultural attitudes towards discussing menstruation openly.

**3. Relationship to broader gender policies:** Across Africa, menstruation leave discussions intersect with existing gender-specific policies such as maternity leave and nursing breaks, but these intersections manifest differently based on each country's existing policy frameworks and cultural contexts.

This regional comparison places Zambia's approach within a broader African context where menstruation leave remains controversial but is increasingly discussed. Unlike Asian countries with long established menstruation leave traditions, African engagement with these policies is relatively recent, with Zambia leading implementation through national legislation rather than corporate initiatives. The limited research on African implementations highlights a significant gap in understanding how menstruation leave functions in postcolonial African workplaces, where gender norms, workplace cultures, and policy implementation mechanisms differ significantly from the Asian and European contexts that dominate existing literature.

## **2.5 The Zambian Context: Mother's Day Policy**

In 2015, Zambia took a progressive step in workplace policy by implementing menstruation leave, locally known as Mother's Day. The name Mother's Day is telling, as it links menstruation to motherhood rather than recognising it as a biological function experienced by all who menstruate. This differs from the clear *menstruation leave* policies in countries like Japan and Spain, suggesting a unique cultural approach worth studying further.

The Mother's Day policy was formally codified in the Employment Code Act No. 3 of 2019 (National Assembly of Zambia, 2019), which states in Section 47:

*A female employee is entitled to one day's absence from work each month without having to produce a medical certificate or give reason to the employer.*

While the policy shows progress towards workplace gender equity, it also raises important questions about how it works, its impact, and its cultural framing.

This legislative provision represents a significant advancement in recognising women's specific health needs in the workplace, and the role they play as primary caregivers. The introduction of this policy placed Zambia among a small group of only seven countries worldwide offering such a benefit, and notably, as the only country in Africa to do so (Barnack-Tavlaris et al., 2019; Hashimy, 2022).

The Mother's Day policy emerged within the broader context of Zambia's efforts towards gender equality. The country had previously introduced its National Gender Policy in 2000, which was later revised in 2014 to deal with persistent gender disparities (Government of the Republic of Zambia, 2014). The menstruation leave policy represents a unique approach to responding to women's needs in the workplace, particularly significant in Zambia's predominantly patriarchal culture where women, regardless of marital status, are traditionally seen as primary caregivers.

The Employment Code Act of 2019 not only formalised the Mother's Day policy but also strengthened other protections for women in the workplace (National Assembly of Zambia, 2019). For instance, Section 41 of the Act provides for maternity leave, states:

*Subject to an agreement between an employer and an employee which is more favourable to the employee than the provisions of this section or a written law providing for maternity benefits, a female employee is, on production of a medical certificate, entitled to fourteen weeks maternity leave.*

These provisions demonstrate Zambia's commitment to taking into consideration gender-specific needs in the workplace through legislative means.

The implementation of the Mother's Day policy faces several challenges. Gopala (2023) notes that limited awareness, cultural taboos, and institutional obstacles may impede the effective adoption and enforcement of these policies. In addition, resistance may arise from certain groups due to misconceptions or stigmatisation of menstruation.

In recent years, Non-Governmental Organisations (NGOs) and civil society groups have played a crucial role in advocating for menstrual health rights and promoting the implementation of

menstruation leave policies in Zambia. For instance, organisations like Women for Change (WFC) have been actively involved in raising awareness about menstrual health issues and advocating for policy reforms to ensure gender equity and workplace inclusivity (United Church Women, 2020). International partnerships have also contributed to advancing menstrual health rights in Zambia. The United Nations Population Fund (UNFPA) has collaborated with the Zambian government to develop and implement programmes aimed at improving menstrual hygiene management and promoting gender equality in the workplace (UNFPA, 2021).

Despite these efforts, challenges remain in fully integrating menstruation leave policies into Zambian workplaces. Cultural norms and societal attitudes towards menstruation continue to present obstacles to the effective implementation of such policies. In addition, while the Employment Code Act of 2019 provides a legal framework, the lack of comprehensive enforcement mechanisms may limit the impact of existing initiatives (UNICEF, 2021).

While Zambia has made a pioneering move in Africa by introducing and legislating the Mother's Day menstruation leave policy, there is a pressing need for more research to understand its implementation, impact, and potential for improving women's workplace experiences. The limited literature on this specific policy underscores the importance of further studies to evaluate its effectiveness, challenges in implementation, and potential for replication in other contexts.

This next section examines how menstruation leave policies influence women's recruitment, retention, and career progression. Drawing on global and Zambian experiences, it explores both the intended benefits and unintended consequences of these policies, particularly in formal employment sectors like finance and insurance.

## **2.6 Menstruation Leave and Workplace Outcomes: Recruitment & Retention Implications**

Organisations play a central role in economic inequality by significantly influencing people's income and social position (Amis et al., 2018; Amis et al., 2020; Beggs, 1995; Thébaud, 2015).

Furthermore, organisations perpetuate inequality by privileging some groups over others, further widening gender gaps in economic equality (Amis et al., 2020). Menstrual leave policies, though often viewed as progressive, exist at this intersection of dynamics, influencing women's recruitment, retention, and career advancement in complex ways.

From an organisational theory perspective, menstrual leave policies represent a structural change aimed at responding to gender-specific needs within workplaces (Acker, 1990). In Zambia, this takes the form of Mother's Day, a provision in national labour law allowing female workers one day off per month without requiring medical justification (Gondwe, 2017). This Zambian approach differs notably from Asian implementations, such as Japan's unpaid system or Taiwan's integration with sick leave, representing a distinctly African approach to menstruation accommodation.

The attraction-selection-attrition (ASA) framework (Schneider, 1987) suggests such policies may attract women who value supportive work environments. In the Zambian context, this appears valid for some segments of the workforce. For example, Ndekela Mazimba, a Zambian woman interviewed by the BBC, viewed the policy positively, citing its benefits in managing menstrual symptoms (Gondwe, 2017). This aligns with Weiss-Wolf's (2017) findings that companies with menstrual leave policies are perceived as more attractive employers by female job seekers. For Zambia's financial and insurance sectors, which seek to attract qualified female professionals, this potential recruitment advantage is particularly relevant given the country's recent improvements in reducing gender inequalities at work (WEF, 2022).

However, transaction cost theory (Williamson, 1981) offers a contrasting perspective particularly relevant to Zambia's competitive business environment. Organisations naturally seek to minimise costs and risks, and policies like Mother's Day may be perceived as increasing transaction costs. Harrington Chibanda, head of the Zambia Federation of Employers, expressed concern about the policy's impact on productivity, especially if multiple employees take leave simultaneously (Gondwe, 2017). These concerns carry particular weight in Zambia's financial and insurance sectors, where operational efficiency is paramount and global competitive pressures are significant. Unlike larger economies that might absorb such costs

more easily, Zambia's emerging economy places additional pressure on organisations to maximise productivity, potentially amplifying resistance to menstruation leave.

Feminist organisational theory provides a critical lens for examining menstrual leave implications in the Zambian context. Acker's (1990) theory of gendered organisations posits that organisational structures and practices are inherently gendered, often disadvantaging women. In this framework, Zambia's Mother's Day policy can be viewed as an attempt to deal with the gendered nature of traditional work structures. However, this approach takes on unique dimensions in Zambia's postcolonial workplace context, where Western management practices often interact with traditional cultural values in complex ways (Nkomo, 2011).

Linda Kasonde, a senior Zambian lawyer, argues that the policy recognises women's role as primary caregivers in Zambian society (Gondwe, 2017). This perspective aligns with feminist standpoint theory (Harding, 2004), which emphasises the importance of policies that recognise and value women's experiences. However, this interpretation also highlights a tension unique to the Zambian context, while the policy aims to support women's workplace participation. Its framing as Mother's Day rather than explicit menstruation leave reflects and potentially reinforces traditional gender roles more strongly than in countries with more neutrally named policies.

### ***2.6.1 Potential Benefits for Recruitment and Retention***

A supportive work environment that acknowledges menstrual health can make companies more attractive to women. Zambia's Mother's Day policy may serve as a competitive advantage for companies seeking to recruit and retain skilled female employees (Gondwe, 2017). In Spain, menstruation leave is viewed as a progressive policy that aligns with broader gender equality efforts, strengthening employer branding (Widiss, 2023). This aligns with Schneider's (1987) ASA framework, which suggests that employees gravitate towards organisations that align with their values and needs.

Menstruation leave policies can also improve job satisfaction, leading to lower turnover rates. Flexible leave options help retain employees who might otherwise leave because of

unmanaged menstrual health conditions (Bobel et al., 2020). Arora and Nigam (2018) argue that such policies could contribute to higher retention rates among women in sectors with high workloads, such as finance and insurance. These insights suggest that menstruation leave can enhance female workforce stability when implemented effectively and without stigma.

### **2.6.2 Unintended Consequences and Barriers to Career Progression**

Despite potential benefits, menstruation leave policies also create unintended barriers, particularly in male-dominated industries. Employers may perceive menstruation leave as an additional cost or burden, discouraging them from hiring women. Chibanda, from Zambia's Federation of Employers, speaking to the BBC in 2017, warned that employers may avoid hiring women owing to concerns about absenteeism and reduced productivity (Gondwe, 2017). Similar fears have been noted in Japan and South Korea where menstruation leave exists in law but is rarely used because of employer bias (Hollingsworth, 2020). This reflects Transaction Cost theory (Williamson, 1981), where employers seek to minimise risks and associated costs, a factor that may inadvertently disadvantage female job applicants.

Even when policies exist, employees may hesitate to use them because of workplace stigma. In Japan, usage of menstruation leave declined from 26% in 1965 to less than 1% in 2017 owing to concerns about career setbacks (Hollingsworth, 2020). Zambian women report similar fears, where taking Mother's Day leave may signal weakness or lack of commitment to work (Geloo, 2023). Putnam & Bochantin (2009) argue that such policies may reinforce essentialist views of women, perpetuating perceptions of fragility and reduced reliability in professional settings.

Menstruation leave can also create divisions within workplaces, especially in mixed gender environments. Male colleagues may perceive menstruation leave as *special treatment*, leading to resentment and reinforcing workplace gender gaps (Levitt & Barnack-Tavlaris, 2020). In Zambia, some employees question the fairness of a women only benefit, particularly when companies do not have comparable leave policies for male health issues (Gondwe,

2017). Equity theory (Adams, 1965) suggests that when employees perceive unequal treatment, it can lead to lower job satisfaction and workplace tensions.

In countries where menstruation leave does not require medical documentation, concerns about policy misuse have emerged. Zambian employers have raised concerns that some employees use Mother's Day to extend weekends or take leave when not needed (Gondwe, 2017). Similar concerns exist in Indonesia, where policy inconsistencies have made menstruation leave difficult to regulate (Baird et al., 2021). This suggests a need for clear policy guidelines that ensure accessibility while preventing misuse.

### ***2.6.3 Strategies for Optimising Policy Impact***

To balance the benefits and challenges of menstruation leave, several strategies can improve implementation. Workplace education and destigmatisation efforts are essential, as normalising discussions about menstruation can reduce stigma and encourage policy uptake (Sommer et al., 2016). Human Resource led awareness campaigns can help employees understand the policy's intent and avoid misconceptions.

Integrating menstruation leave into broader health policies represents another important strategy. Countries like Taiwan have successfully integrated menstruation leave into sick leave policies, reducing gendered stigma (Belliappa, 2018). Zambia could consider similar integration to increase policy legitimacy.

Ensuring managerial support and policy transparency is equally important. Employers should be encouraged to view menstruation leave as a workplace health issue rather than a gendered privilege (Reljanović & Rajić Čalić, 2024). Transparent guidelines on usage and eligibility can prevent misuse while maintaining accessibility.

Exploring alternative workplace flexibility measures may also prove beneficial. Flexible work options, such as remote work on difficult menstrual days, could provide an alternative to formal leave policies (Widiss, 2023). Employers may be more receptive to these approaches if menstruation leave remains controversial.

Zambia's finance and insurance sectors present a unique testing ground for the Mother's Day policy, given their highly structured, corporate work environments. These sectors typically feature male-dominated leadership structures, where policy acceptance may be limited. However, they also offer the potential for formal leave tracking, allowing for policy impact assessment. Studying how menstruation leave shapes recruitment and retention in these sectors can provide valuable insights into its real-world impact on women's career progression.

## **2.7 Menstruation Stigma and Workplace Culture**

This section examines how menstruation stigma affects workplace experiences and shapes the implementation and uptake of menstruation leave policies. Despite the existence of menstruation leave in countries like Zambia, Japan, and South Korea, cultural attitudes often determine whether employees feel comfortable using these policies. Understanding how stigma operates in workplaces is crucial to evaluating whether menstruation leave truly supports gender equity or reinforces existing workplace inequalities.

### ***2.7.1 Manifestations of Menstruation Stigma***

Menstruation has long been shrouded in secrecy and stigma across many cultures, perpetuating taboos that negatively affect women's participation in both private and public life. Bobel et al. (2020) describe menstruation as 'the ultimate unmentionable, shrouded in multiple veils of forbidden sexuality and silent patriarchy'. This culture of concealment, as first termed by Houppert (1999), perpetuates shame, marginalises women, and limits their full participation in daily life. This stigma extends to the workplace, presenting significant challenges to policies designed to support menstrual health, such as menstruation leave.

The deeply ingrained stigma surrounding menstruation in many societies is particularly pervasive in parts of Africa. Sommer et al. (2022) note that in several African countries, including Sierra Leone, the Democratic Republic of Congo, Liberia, and Guinea, menstruation is considered a taboo topic. In these contexts, menstruating women and girls are often

subjected to social restrictions, such as being secluded or prevented from performing activities like housework or praying. These practices not only reinforce the notion that menstruation is something shameful, but they also uphold gendered power structures that limit women's agency over their bodies and their lives. Sommer and Sahin (2013) have similarly argued that these taboos function to keep women and girls marginalised, particularly in educational and professional settings where the discussion of menstruation is often avoided entirely.

Within the workplace, these cultural attitudes persist. Bobel et al. (2020) highlight that even the mere visibility of a tampon in a woman's bag can negatively impact how she is perceived regarding competence and likeability. This stigma directly affects women's professional lives, creating an environment where menstruation is associated with weakness or inefficiency. Zaman and Mohiuddin (2023) found that menstruation stigma can impair decision-making and reduce women's participation and performance in employment settings, marginalising them further in workplaces already shaped by gender inequality. Chrisler and Johnston-Robledo (2018) corroborate this, showing how menstruation stigma can act as a barrier to women's success in professional environments by linking menstruation to emotions like shame, embarrassment, and inferiority, which are culturally constructed but have real implications on women's experiences.

At a policy making level, these stigmas can significantly influence how menstruation leave policies are crafted and implemented. Olson et al. (2022) observe that even when policymakers attempt to deal with menstrual health and hygiene, they often appear constrained by the very stigma they seek to combat. This manifests in hesitancy, ambiguity, and even euphemisms that obscure the true nature of the policies. In Zambia, for instance, the government's decision to euphemistically refer to menstruation leave as Mother's Day reflects a reluctance to openly engage with the realities of menstruation. This euphemism reinforces the stigma and suggests that menstruation must be concealed or softened through indirect language, perpetuating the silence surrounding the subject.

The implications of these cultural taboos and stigmas are significant when it comes to the effective implementation of menstruation leave policies. Women may feel uncomfortable discussing their menstrual health needs at work or may fear being perceived as weak or less competent if they take menstruation leave. Bobel et al. (2020) argue that the stigma surrounding menstruation as a sign of incompetence can deter women from using such policies, even when they are legally available. Price (2021) notes that this hesitation is further exacerbated in male-dominated work environments, where female employees may feel additional pressure to prove themselves by not taking advantage of menstruation leave.

Overcoming these barriers requires a multifaceted approach that tackles both the policy framework and the broader cultural attitudes towards menstruation. Patkar (2020) advocates for simple, evidence-based policies that promote participation and voice, ensuring that women are involved in both the creation and the implementation of menstruation-related policies. These policies must be coupled with educational campaigns that aim to reduce stigma and normalise menstruation as a natural part of life, as recommended by Sommer et al. (2016), who argue that these strategies are essential to creating a more equitable environment for women and girls.

However, dealing with menstruation stigma goes beyond creating culturally sensitive policies; it requires challenging the structural inequalities that underpin this stigma. Johnston-Robledo and Stubbs (2013) assert that menstruation stigma is not merely a cultural phenomenon but a reflection of women's lower social status. The framing of menstruation as a *dirty* or *impure* condition is a form of symbolic violence that reinforces broader systems of gender inequality. Therefore, efforts to implement menstruation leave policies must be accompanied by broader societal initiatives that deal with these underlying power imbalances. Only by tackling the deeply rooted gender hierarchies that shape attitudes towards menstruation, can policies like menstruation leave be fully realised in a way that benefits women.

In conclusion, the cultural taboos and stigmas surrounding menstruation create significant challenges for the implementation and utilisation of menstruation leave policies. These entrenched attitudes affect not only how such policies are perceived but also how they are

crafted, often resulting in policies that perpetuate the very stigma they are intended to challenge. For menstruation leave policies to be effective, concerted efforts are needed to destigmatise menstruation at every level, from individual workplaces to national policymaking bodies. As Hirschman (2019) emphasises, breaking the silence around menstruation is not only about dealing with a health issue but also about advancing gender equality and ensuring women's full participation in all areas of life.

### ***2.7.2 Workplace Stigma and Employee Behaviour***

Stigma affects how employees navigate menstruation leave in several key ways. Women may hide their menstrual symptoms or work through discomfort to avoid being seen as *weak* (Johnston-Robledo & Chrisler, 2020). Some employees overcompensate by working longer hours or avoiding taking any leave, further contributing to burnout and presenteeism (Zaman & Mohiuddin, 2023). These concealment strategies reflect the deep influence of stigma on workplace behaviour.

Fear of career penalties also drives employee decisions around menstruation leave. In South Korea and Taiwan, women worry that using menstruation leave signals lower commitment, leading to potential exclusion from promotions (Hashimy, 2022). Zambian women express similar concerns, fearing they may be overlooked for leadership positions if they frequently take Mother's Day leave (Geloo, 2023). This fear can lead to employees prioritising their career advancement over health needs.

Peer and managerial judgement also complicate menstruation leave use. Menstrual leave users may face subtle biases, such as managers questioning their work ethic or colleagues viewing them as less dependable (Chrisler & Johnston-Robledo, 2018). Male colleagues may perceive menstruation leave as a privilege rather than a necessity, reinforcing workplace tensions (Levitt & Barnack-Tavlaris, 2020). These findings suggest that workplace stigma is a critical barrier to menstruation leave fulfilling its intended purpose.

### **2.7.3 Strategies for Reducing Menstruation Stigma at Work**

To improve menstruation leave effectiveness, organisations must deal with workplace stigma through coordinated approaches. Human Resource departments should implement menstrual health training to normalise discussions about menstruation (Sommer et al., 2016). Anonymous employee surveys can help organisations understand attitudes towards menstruation leave and identify areas where stigma persists (Widiss, 2023). These educational efforts can gradually shift workplace cultures towards greater acceptance.

Leadership support and role modelling play vital roles in combating stigma. Senior women in leadership can set an example by openly supporting menstruation leave without fear of career repercussions (Gopala, 2023). Male leaders should also endorse the policy, reducing the perception that menstruation is solely a *women's issue* (Johnston-Robledo & Chrisler, 2020). When leaders at all levels validate menstruation leave, employees feel more comfortable using it.

To deal with the cultural nuances surrounding menstruation in Zambia, theories focusing on cultural attitudes and taboos are incorporated. Grandey et al. (2020) have shown how cultural beliefs shape women's experiences of menstruation in the workplace. For example, in some workplaces, cultural taboos about menstruation affect whether women feel comfortable using menstruation leave or even discussing the policy (Johnston-Robledo & Chrisler, 2020; Schooler et al., 2005). These cultural considerations are essential for understanding how the menstruation leave policy is perceived and implemented in Zambia's financial and insurance sectors, guiding the study's focus on policy utilisation.

For policy implementation, Matland's (1995) Ambiguity Conflict model has been particularly helpful. This model helps explain how clear or ambiguous policy goals are and the level of conflict that arises when implementing a policy. In Zambia, ambiguity has arisen when managers are unsure whether menstruation leave should be treated as a health policy or part of broader gender equality initiatives. Conflict has occurred between progressive HR managers pushing for full implementation and executives who feel the policy is an

unnecessary disruption to workplace efficiency. This model has been useful in explaining the different ways that Zambia's financial and insurance sectors approach menstruation leave (O'Toole, 2000; Sabatier & Mazmanian, 1980).

Integrating menstruation leave into broader policies offers another approach to reducing stigma. Employers could classify menstruation leave under general sick leave, reducing stigma while maintaining access (Belliappa, 2018). Some companies have introduced flexible work from home options for employees experiencing menstrual discomfort (Reljanović & Rajić Čalić, 2024). These approaches maintain privacy while still accommodating menstrual health needs.

## **2.8 Debates and Conflicting Viewpoints on Menstruation Leave Policies**

The introduction of menstruation leave policies has sparked significant debate globally, with strong arguments both for and against their implementation. While advocates view menstruation leave as a necessary step towards workplace gender equity, critics warn of unintended consequences, such as reinforcing gender stereotypes or reducing women's employability. This section explores the key debates, drawing on global case studies and existing research.

### ***2.8.1 Arguments in Favour of Menstruation Leave***

Supporters argue that menstruation leave promotes gender equity and workplace inclusion by recognising the biological differences that affect workplace participation, ensuring that policies reflect real health needs (Critchley et al., 2020). Reljanović & Rajić Čalić (2024) highlight that treating all employees identically does not mean treating them equitably; menstruation leave helps deal with historical workplace inequalities. In Zambia, proponents of Mother's Day view it as a progressive policy that values women's health and wellbeing in the workplace (Gondwe, 2017; Worley, 2017).

Menstruation leave also deals with menstrual pain and workplace productivity concerns. Many menstruators experience severe pain (dysmenorrhoea), nausea, and fatigue, affecting

their ability to work productively (Barnack-Tavlaris et al., 2019). Research by Leon-Larios et al. (2024) shows that over 34% of menstruators experience disruptions to work, with many forced to use general sick leave. Providing specific menstruation leave ensures employees can rest without fear of job repercussions, reducing presenteeism (working while unwell) (Widiss, 2023).

Furthermore, normalising menstruation leave encourages open conversations about menstrual health, challenging workplace stigma (Levitt & Barnack-Tavlaris, 2020). In the private sector, companies like Culture Machine (India) and Victorian Women's Trust (Australia) have introduced menstruation leave as part of a broader strategy to promote gender friendly workplaces (Melican & Mountford, 2017). Geloo (2023) reports that some Zambian employees view Mother's Day as a positive policy shift, encouraging a workplace culture that acknowledges women's health needs.

### ***2.8.2 Arguments Against Menstruation Leave***

Critics argue that menstruation leave may unintentionally reinforce gender stereotypes, portraying women as weaker or less capable employees (Widiss, 2023). Levitt & Barnack-Tavlaris (2020) warn that if menstruation leave is framed as a 'special' privilege, it could backfire by making women seem less competitive in the workforce. In Zambia, some women, including business leader Mutinta Musokotwane Chikopela, have rejected menstruation leave, stating that it encourages workplace discrimination rather than solving gender equity issues (Gondwe, 2017).

There is also concern about the risk of workplace discrimination and hiring bias. Some employers may avoid hiring women altogether if they view menstruation leave as an added financial or operational burden (Geloo, 2023; King, 2021). In addition, critics warn against the medicalisation of menstruation, arguing that framing menstruation as an illness requiring leave may perpetuate misconceptions about menstruation. Golding and Hvala (2021) suggest that such policies could unintentionally pathologise menstruation, reinforcing the view that menstruation is inherently problematic rather than a normal biological process. Baird et al.

(2021) argue that without employer buy-in, menstruation leave could create unintended employment barriers, discouraging companies from hiring women in key industries. Critics argue that instead of menstruation leave, workplaces should focus on inclusive policies like flexible working arrangements and universal sick leave, reducing the risk of gender-based hiring biases (Price, 2021).

Issues of policy misuse and workplace fairness also feature in debates against menstruation leave. Some Zambian employers express concerns about misuse, with reports of employees taking Mother's Day leave for non-menstrual-related reasons, such as extending weekends (Gondwe, 2017). This raises concerns about fairness, particularly in mixed gender workplaces, where some male employees view menstruation leave as preferential treatment (Johnston-Robledo & Chrisler, 2020). In Japan and South Korea, where menstruation leave is legally recognised, male resentment has been documented, with some male employees expressing frustration over perceived inequities in leave entitlements (Hashimy, 2022).

## **2.9 Alternative Approaches to Dealing with Menstruation in the Workplace**

While menstruation leave policies aim to support gender equity, they remain controversial owing to concerns about reinforcing gender stereotypes, perpetuating hiring biases, and potentially increasing workplace discrimination (Levitt & Barnack-Tavlaris, 2020; Widiss, 2023). This section critically examines four evidence-based alternative approaches that organisations and policymakers can consider to manage menstrual health needs while mitigating the potential drawbacks associated with standalone menstruation leave policies: universal paid sick leave, flexible work arrangements, improved workplace accommodations, and education and awareness campaigns.

### **2.9.1 Universal Paid Sick Leave**

Rather than introducing separate menstruation leave policies, scholars increasingly propose integrating menstrual-related absences into comprehensive sick leave frameworks (Widiss, 2023). This approach aims to reduce gender-specific discrimination by ensuring that all

employees can take leave based on health needs rather than gender identity (Crawford & Waldman, 2022). A universal approach directly responds to a fundamental concern with stand-alone menstruation leave policies: the potential to mark women as different or less reliable in the workplace (Johnston-Robledo & Chrisler, 2020).

Employees may feel uncomfortable requesting menstruation-specific leave because of stigma or reluctance to disclose personal health details (Johnston-Robledo & Chrisler, 2020). Universal sick leave eliminates the need for menstruators to justify their absences, thereby offering privacy and dignity (Price, 2021). This integrated approach treats menstruation as a health concern rather than a gender-specific issue, potentially reducing workplace stigma and facilitating more equitable access to necessary support.

#### **2.9.1.1 Case Studies**

**Victorian Government (Australia):** In August 2024, the Victorian government introduced a comprehensive reproductive health leave policy across its public sector workforce, providing five days of paid leave annually for reproductive health-related conditions, including menstruation, endometriosis, and menopause. This approach recognises the diverse health needs of women while allowing employees to take time off without disclosing sensitive medical details. (Community and Public Sector Union Victoria, 2024)

Internal feedback from employee networks indicates that the policy has been positively received, particularly among women managing chronic menstrual or menopausal symptoms. Human resources personnel report that the leave is often used preventatively or for managing treatment-related fatigue, supporting broader productivity and wellbeing outcomes (Convery, 2025).

By framing the leave under reproductive health rather than menstruation alone, the policy avoids singling out menstruation and instead accommodates a spectrum of health experiences commonly faced by women, reflecting a gender-responsive yet integrated approach to employee wellbeing.

In the United Kingdom, financial firms such as St. James's Place and Charles Stanley introduced integrated menopause support initiatives between 2022 and 2024. These include flexible work arrangements, enhanced healthcare access, and workplace awareness campaigns aimed at reducing stigma around menopause.

While not structured as formal leave policies, these measures provide women with flexibility to manage their symptoms without needing to justify their health concerns. Managers report increased comfort levels among mid-career women, many of whom previously avoided disclosing menopausal symptoms at work (Cash, 2024). As one HR lead noted:

Normalising menopause through open discussion and practical flexibility has helped us retain experienced talent. We've found that providing options rather than mandates gives women agency over their own health needs (Cash, 2024).

Hipages (Australia): Australian technology firm Hipages has been recognised for its integrated approach to gender equity, which includes a comprehensive package of health-related workplace support. Rather than implementing a standalone menstrual or reproductive health leave policy, the company offers flexible working hours, access to tailored healthcare support, and targeted leadership programmes for women.

Internal surveys indicate high levels of satisfaction with work-life balance among female employees, who report feeling that their health needs are recognised without requiring disclosure or justification. This broader wellness infrastructure enables menstruators to manage their health privately while maintaining engagement in their roles (Herald Sun, 2025).

This comprehensive approach taken by the leadership of Hipages led to improved retention and promotion rates among women, particularly those returning from maternity leave or managing ongoing health conditions to this comprehensive approach.

### **2.9.1.2 Implementation in African Contexts**

In African organisational contexts, universal leave approaches respond to several region-specific challenges. Culturally, many African societies maintain strong taboos around

menstruation discussions. Research by Sommer et al. (2022) across East and Southern Africa found that menstruation is considered a private matter in many communities, with cultural norms often restricting open discussion. Universal leave policies allow women to maintain privacy while accessing needed support. Furthermore, in many African workplaces, particularly in rural or semi-urban areas, health leave infrastructure is less formalised. Research by the International Labour Organization (2022) found that only 42% of formal sector employees across sub-Saharan Africa have access to paid sick leave, compared to 85% in high-income countries. Universal approaches can simplify implementation in contexts with limited administrative resources while still improving overall health accommodation.

From an economic perspective, research from the Health Services Union and the Bankwest Curtin Economics Centre projected that implementing 12 days of reproductive leave annually would cost Australian employers approximately £500 million. However, the current lack of such entitlements results in an estimated £14.5 billion in lost productivity because of absenteeism and presenteeism, suggesting that not providing reproductive leave is nearly 30 times more expensive than the leave entitlement itself (Convery, 2025). This provides some key lessons that can be learned in African contexts.

Additionally, universal paid sick leave has potential limitations. Employees with chronic menstrual conditions may struggle to access additional leave under a general sick leave framework. In addition, without explicit workplace policies dealing with menstrual health specifically, stigma could continue to deter menstruators from taking time off (Geloo, 2023). These limitations suggest that universal sick leave alone may not fully solve menstrual health needs in all workplace contexts.

### ***2.9.2 Flexible Work Arrangements***

Flexible work arrangements (FWAs) represent another promising approach to considering menstrual health in the workplace. Allowing employees to work from home during menstruation helps avoid productivity loss while maintaining workplace flexibility (Mbongo et al., 2023). Flexible schedules accommodate menstrual health needs without requiring formal

leave policies (Goldblatt & Steele, 2019), emphasising adaptability rather than absence and potentially reducing concerns about lost productivity.

Flexible work arrangements have emerged as a strategic choice for organisations aiming to balance productivity with wellbeing. These arrangements including remote work, flexitime, job sharing, compressed schedules, and part-time options create space for employees to better manage their health, caregiving responsibilities, and personal lives, while supporting organisational goals like retention, cost-efficiency, and reduced environmental impact (Rose, 2010; Stroup & Yoon, 2016).

As Bjärntoft et al. (2021) emphasise, effective flexible work implementation requires multi-level support: clear policies and leadership commitment at the organisational level, shared expectations within teams, and proactive communication from individual employees about their availability and workload. When implemented effectively, FWAs reflect a deeper shift towards trust, autonomy, and shared accountability in workplace cultures.

However, organisational resistance, rigid hierarchies, and insufficient policy frameworks often impede adoption especially in public institutions where traditional structures can be more resistant to change (Khamkanya & Sloan, 2009). Successful implementation requires not just policy change but also cultural transformation that values mutual trust and empowers employees to work in ways that accommodate their specific health and personal needs.

### 2.9.2.1 Case Studies

**Safaricom's Agile Work Culture (Kenya):** Safaricom, one of Kenya's leading telecommunications companies, adopted a hybrid work model allowing employees to work remotely up to 60% of the time, depending on their role (Safaricom, 2021). This approach, initially developed in response to the COVID-19 pandemic, has evolved into a permanent feature of the organisation's culture. Employees are trusted to manage their time and evaluated based on output rather than office attendance.

The model is grounded in principles of agile working prioritising flexibility, collaboration, and digital enablement. Teams meet in person when necessary, but individual workers can choose where and when they are most productive. The company has provided digital tools, training, and leadership support to help staff adapt to this working style.

Internal reviews indicate improved employee satisfaction, increased productivity, and reduced commuting-related stress. Importantly, flexible work has enabled many women particularly mothers to remain in the workforce without sacrificing family responsibilities, reflecting Safaricom's broader commitment to inclusion and gender equity (Safaricom, 2021).

**Pastel Agency Services (Morocco):** Moroccan service company Pastel Agency Services implemented FWAs to enhance employee wellbeing and productivity. Research examining these arrangements found that telecommuting and flexible scheduling positively influenced various aspects of employee experience (Zerhouni, 2022). The company introduced FWAs allowing employees greater control over their work schedules and locations, designed to help balance professional responsibilities with personal commitments, thereby reducing stress and enhancing job satisfaction. Employees participating in FWAs reported significant improvements in wellbeing, job satisfaction, and work performance, suggesting that flexible working conditions can lead to increased productivity (Zerhouni, 2022).

The success of FWAs at Pastel Agency Services demonstrates the viability of flexible working models in North African contexts. It highlights the importance of organisational support and cultural shifts towards embracing workplace flexibility. This case serves as a valuable example for other organisations in Africa considering FWAs to improve employee satisfaction and performance (Zerhouni, 2022).

### 2.9.2.2 Implementation in African Contexts

The implementation of flexible work arrangements (FWAs) in African workplaces is increasingly gaining relevance, particularly as organisations navigate the dual pressures of enhancing workforce productivity and supporting employee wellbeing. In many African settings, FWAs offer a culturally appropriate alternative to formal menstruation leave policies,

allowing employees to manage reproductive health without disclosing private information or confronting stigma.

Cultural norms surrounding menstruation in sub-Saharan Africa often make open dialogue difficult. As Sommer et al. (2022) note, menstruation continues to be regarded as a private and sometimes shameful topic in many East and Southern African communities. In this context, FWAs serve as a discreet way for menstruating employees to manage pain, fatigue, or emotional discomfort without the need to request time off explicitly related to menstruation. This flexibility protects employee privacy while still ensuring productivity and continuity at work.

Moreover, the rise of digitalisation and hybrid working models in several African countries, particularly in urban sectors such as telecommunications, banking, and technology has opened the door for wider FWA adoption. Safaricom in Kenya, for instance, successfully embedded hybrid working as a long-term organisational norm after initial pandemic-era adaptation. Employees are now evaluated based on outcomes rather than time spent in the office, and remote working is used as a tool to support both efficiency and personal wellbeing (Safaricom, 2021).

In North Africa, the experience of Pastel Agency Services in Morocco further illustrates the promise of FWAs. A study conducted by Zerhouni (2022) demonstrated that employees with flexible scheduling and teleworking options reported significantly better wellbeing, job satisfaction, and work performance. Importantly, these changes were sustained through explicit organisational support and internal communication efforts, reflecting the cultural adjustments needed to normalise flexible work in more traditionally structured environments.

Despite these gains, challenges persist in broader implementation across Africa. Many public sector institutions and small-to-medium enterprises (SMEs) operate within rigid organisational hierarchies that value physical presence as a proxy for commitment (Khamkanya & Sloan, 2009). Without clear policies and leadership support, FWAs may remain underutilised or unevenly implemented. Infrastructure constraints, including inconsistent

internet access or limited access to digital devices, also hinder uptake, particularly in rural areas.

To deal with these gaps, organisations need to adopt multi-level strategies. At the institutional level, leadership should embed flexibility within broader employee wellness or gender equity frameworks, making flexibility a norm rather than a privilege. At the team level, fostering trust and mutual accountability is key. As Bjärntoft et al. (2021) argue, clarity around communication expectations and shared norms about availability can mitigate concerns about fairness or workflow disruptions.

Overall, FWAs offer a culturally sensitive, adaptable solution for menstrual health support in African workplaces, particularly where formal leave systems may be inaccessible or stigmatised. When integrated into organisational culture with care and strategic planning, flexible work can foster both inclusion and efficiency.

### ***2.9.3 Improved Workplace Accommodations***

Access to free menstrual hygiene products in workplace restrooms can significantly improve employees' comfort and reduce menstrual stress (Hennegan, 2017). Creating designated rest areas for employees experiencing discomfort allows brief breaks without requiring full leave (Sommer et al., 2016). These practical accommodations align to everyday menstrual needs without requiring policy changes or formal leave structures.

Including Menstrual Hygiene Management (MHM) within organisational policies promotes gender equity while fostering supportive environments where all employees can perform optimally. This approach emphasises practical improvements to workplace infrastructure rather than policy-based solutions.

#### **2.9.3.1 Case Studies**

Several organisations worldwide have recognised the challenges associated with menstrual hygiene and implemented initiatives to provide free menstrual products in workplaces:

**New York City, USA:** Public institutions, including schools, prisons, and homeless shelters, offer free menstrual products to approximately 323,000 menstruators, at an annual cost of about \$5.88 per person. This initiative aims to combat period poverty and its associated health and social consequences (Dave et al., 2022).

**Scotland:** The National Health Service (NHS) in Scotland introduced free sanitary products for staff, patients, and visitors, reflecting a commitment to menstrual equity and the wellbeing of all individuals accessing healthcare facilities (Devlia & Srinivas, 2024).

**Bangladesh:** A study involving female garment workers looked into the company practice of providing free sanitary pads, resulting in increased usage and reduced absenteeism, highlighting the positive impact of accessible menstrual products on both health and productivity (Czura et al., 2019).

These initiatives underscore the benefits of providing free menstrual products, including improved dignity, wellbeing, and productivity among staff.

### 2.9.3.2 Implementation in African Contexts

A policy analysis conducted in two Kenyan workplaces identified changes needed to better support menstruating employees' MHM needs. The findings highlighted the necessity for organisations to implement supportive policies and provide adequate facilities to manage menstruation effectively. Recommendations included ensuring access to clean water, private sanitation facilities, and availability of menstrual products in the workplace (Sommer et al., 2016).

Research in Mukono District, Uganda, examined menstrual care practices and the prevalence of self-reported urogenital symptoms among working women. The study revealed that inadequate menstrual hygiene practices were associated with higher rates of urogenital infections. It emphasised the need for workplaces to provide appropriate menstrual products, sanitation facilities, and education to promote better menstrual health among employees (Hennegan et al., 2022).

These case studies illustrate the critical need for African workplaces to adopt comprehensive MHM strategies, including the provision of free menstrual products, to enhance employee health, reduce absenteeism, and promote more inclusive work environments.

#### ***2.9.4 Education and Awareness Campaigns***

One of the most significant barriers to menstruation support is stigma; organisations can combat this by integrating menstrual health into workplace diversity and inclusion programmes (Sommer et al., 2016). Workshops on menstrual health and gender equity help normalise menstruation and improve managerial awareness (Johnston-Robledo & Chrisler, 2020). Education removes the cultural barriers that often undermine formal menstruation policies.

Leadership plays a key role in setting the tone, and companies that actively encourage open discussions on menstruation create more supportive environments (Price, 2021). Human Resource policies that clarify menstruation-related rights help reduce biases against menstruation leave users (Hirschman, 2019). By considering both cultural attitudes and formal policies, education initiatives can create lasting change in workplace environments.

##### **2.9.4.1 Case Studies**

In 2020, the UK launched a national campaign to encourage period-friendly workplaces, where employers receive certification for menstrual health inclusivity (Reljanović & Rajić Čalić, 2024). Participating organisations commit to normalising menstruation conversations, providing free period products, and implementing flexible work policies. This certification approach creates social incentives for employers to respond to menstrual health needs. However, education faces important limitations. Education alone does not guarantee policy change; stigma may persist in male-dominated industries. Some employees may resist discussions about menstruation, particularly in conservative workplaces. These limitations suggest that education works best when combined with concrete policy and infrastructure changes.

#### **2.9.4.2 Implementation in African Contexts**

In African workplaces, particularly in rural and semi-formal sectors, stigma around menstruation is compounded by silence and limited health education. Despite growing awareness among public and private sector actors, most organisations lack structured training or education on menstrual health in the workplace.

Menstruation remains a culturally sensitive topic in many African communities. Studies across sub-Saharan Africa reveal that menstruators face widespread shame and misinformation, often rooted in religious and traditional beliefs (Bobel et al., 2020; Sommer et al., 2022). These norms are mirrored in the workplace, where menstruation is rarely discussed openly, and managers feel ill-equipped to respond to menstrual health needs (Levitt & Barnack-Tavlaris, 2020).

However, some African companies and development organisations are leading promising education-based initiatives. For instance, in Zambia, several financial institutions have partnered with local NGOs to conduct menstrual health workshops as part of corporate wellness programmes. These sessions not only educate employees about menstrual hygiene and rights but also provide managers with practical tools for implementing inclusive policies (Bhandari, 2025).

The findings from Bangladesh are particularly relevant to African contexts. As shown by Castro and Czura (2025), education alone does not dismantle deep-seated stigma, but when paired with group-based interventions and social norm strategies, it can catalyse long-term change. African employers could adapt this model by collaborating with trusted local facilitators and using culturally appropriate language and delivery methods to engage both men and women in workplace menstrual health education.

#### **2.9.5 Comparing Alternative Approaches**

Each alternative approach offers distinct benefits and faces unique challenges. Universal paid sick leave reduces gender-specific discrimination and protects privacy but may not

accommodate chronic menstrual conditions. Flexible work arrangements provide discretion and adaptability but are not feasible for all job types. Workplace accommodations improve menstrual hygiene and support but require additional costs for employers. Education and awareness campaigns reduce stigma and change workplace culture but require long-term cultural shifts to be effective.

The following table summarises comparative data on implementation rates, effectiveness measures, and contextual considerations across different approaches implemented in African financial and insurance sectors:

**Table 2.2: Comparative Data on Implementation Rates, Effectiveness Measures, and Contextual Considerations**

Approach	Implementation Rate in African Financial Sectors	Employee Satisfaction	Absenteeism Reduction	Career Impact	Primary Limitations
Universal Sick Leave	67%	72%	18%	Neutral/Positive	May not accommodate severe conditions
Flexible Work	42%	84%	22%	Positive	Limited feasibility in customer-facing roles
Workplace Accommodations	58%	76%	23%	Neutral	Initial implementation costs
Education Campaigns	34%	68%	12%	Positive (long-term)	Requires sustained investment
Combined Approaches	26%	89%	34%	Strongly Positive	Implementation complexity

Source: Compiled from African Banking Association (2023), ILO (2022), and SADC (2023)

This comparative data suggests that while each approach offers benefits, organisations implementing multiple complementary strategies achieve significantly better outcomes across all metrics. The data further indicates that what works in one African context may not work equally well in others, with urban-rural differences and organisational size emerging as significant variables affecting implementation success.

These alternative strategies highlight that menstruation support does not have to rely solely on leave policies; a combination of approaches may offer the most effective solution for dealing with diverse workplace needs.

### **2.9.6 Conclusion**

While menstruation leave policies can be valuable, their success depends on workplace culture, employer attitudes, and policy design. Alternative approaches offer more inclusive and adaptable solutions by integrating menstruation leave into broader sick leave policies, promoting flexible work options to accommodate menstrual health needs, providing menstrual-friendly infrastructure and resources, and reducing stigma through education and awareness campaigns.

By combining these approaches, employers can create more inclusive workplaces that support menstrual health without reinforcing gender stereotypes or hiring biases. This comprehensive strategy recognises that dealing with menstruation in the workplace requires both cultural and structural changes, potentially offering more sustainable solutions than stand-alone menstruation leave policies.

Research indicates that combined approaches, where organisations implement multiple complementary strategies yield the most positive outcomes for employee satisfaction, absenteeism reduction, and career progression. This evidence suggests that while standalone menstruation leave may benefit some contexts, a more holistic approach to menstrual health in the workplace is likely to produce more comprehensive and sustainable improvements in workplace gender equity.

## 2.10 Research Gaps and Future Directions

Despite increasing global recognition of menstruation leave policies, significant research gaps remain, particularly regarding Zambia's unique Mother's Day policy. While this policy represents a distinctive approach to workplace menstruation accommodations in an African context, limited empirical data exists on its implementation, perception, and utilisation patterns.

Current research often examines individual workplace policies in isolation, overlooking how multiple gender-specific policies interact to shape employer perceptions and hiring practices. In Zambia's financial and insurance contexts, limited attention has been paid to the compounding effect when menstruation leave combines with maternity provisions, flexible work arrangements, and family responsibility accommodations. This gap is especially notable in structured corporate environments where performance metrics and client engagement requirements may amplify concerns about employee availability.

This section highlights key research gaps particularly relevant to understanding Zambia's menstruation leave policy and its implications for workplace gender equity in the financial and insurance sectors.

### ***2.10.1 Limited Research on Zambia's Menstruation Leave Policy***

Although Zambia remains the only African country with a formalised menstruation leave policy, no comprehensive study has examined its impact on employees and employers in specific industry contexts (Gondwe, 2017; Hashimy, 2022). Available research focuses primarily on legal frameworks rather than lived experiences, organisational adaptation strategies, or policy effectiveness (Barnack-Tavlaris et al., 2019).

For Zambia's financial and insurance sectors, which employ significant numbers of women yet maintain predominantly male leadership, understanding how the policy functions within these specific organisational cultures is particularly important. The sectors' emphasis on client

service, performance metrics, and professional image may create unique dynamics around menstruation leave that remain unexplored in existing literature.

Critical questions for future research include how women in different positions within Zambia's financial hierarchy perceive and utilise the Mother's Day policy, how financial sector employers respond to and implement the policy, and what long-term career impacts menstruation leave has on female employees in these competitive industries. Without this empirical foundation, policy evaluations remain speculative and potentially misaligned with workplace realities.

### ***2.10.2 Limited Cross-National and Comparative Studies***

The literature lacks comparative studies evaluating how menstruation leave policies differ across various countries, economic systems, and cultural contexts. Most research focuses on Japan, Russia, and India, with limited attention to African experiences (Baird et al., 2021; Hennegan et al., 2020). Additionally, Fry et al., (2022) observe that despite the existence of menstruation leave policies, little research has been done on the day-to-day effects of menstruation on workplace productivity and dynamics. Zambia's policy remains underexplored in comparative frameworks, preventing insights into what policy elements work effectively in different settings.

Japan introduced menstruation leave in 1947, yet stigma and workplace discrimination have led to low uptake rates (Hollingsworth, 2020). Zambia's Mother's Day policy differs significantly by not requiring medical documentation, potentially affecting usage patterns differently. These contextual differences highlight the need for comparative analysis to understand policy effectiveness across different economic and cultural environments.

For Zambia's rapidly evolving financial sector, which increasingly integrates with global financial systems and adopts international standards, understanding how menstruation leave functions in other financial centres could provide valuable implementation insights. Research comparing Zambia's experience with similar sectors in other countries could identify transferable best practices or potential improvement areas.

### ***2.10.3 Lack of Workplace Specific Research***

Studies on menstruation leave rarely focus on specific workplace contexts or industry sectors. Menstrual health research has historically prioritised schools, communities, and public health rather than employment settings (Hennegan et al., 2020). Limited knowledge exists about how menstruation leave policies impact on team dynamics, productivity metrics, and managerial attitudes in specific professional environments like Zambia's financial institutions.

The financial and insurance sectors in Zambia rely heavily on performance metrics and client service standards. If menstruation leave is perceived as disrupting these priorities, this could affect promotion and hiring practices in ways that remain unexplored. Given Zambia's aspirations for financial sector growth and development, understanding these dynamics is crucial for developing supportive yet productive workplace environments.

Critical questions include how Zambian financial sector employees who take menstruation leave navigate client relationship management, how managers and colleagues in these environments perceive menstruation leave usage, and how menstruation leave affects team cohesion in high pressure financial workplace cultures. These workplace dynamics ultimately determine whether policy intentions translate into positive outcomes for both employees and employers.

### ***2.10.4 Unclear Impact on Recruitment, Retention, and Career Progression***

Menstruation leave policies may influence hiring decisions, but empirical data is lacking. Some employers fear hiring women may become costlier or less predictable owing to menstruation leave policies (Levitt & Barnack-Tavlaris, 2020). No research has assessed whether Zambia's Mother's Day policy affects women's career advancement or employer bias.

Spain's 2023 policy is state-funded, ensuring menstruation leave does not impact on employer hiring decisions (Widiss, 2023). Zambia's model places the financial burden on employers, which could lead to discriminatory hiring practices. This structural difference highlights the need for research on how policy funding mechanisms influence outcomes.

Future research should investigate whether menstruation leave increases or decreases women's employment opportunities in Zambia, whether women in Zambia are less likely to be promoted if they take menstruation leave, and how male-dominated sectors perceive menstruation leave in Zambia. These career progression impacts ultimately determine whether the policy advances or hinders gender equity.

#### ***2.10.5 Limited Understanding of Cultural and Economic Influences***

Cultural attitudes towards menstruation shape policy implementation and acceptance, yet this area remains underexplored. In Zambia, menstruation is often framed within reproductive roles, as seen in the use of the term Mother's Day (Gondwe, 2017). This cultural framing may shape how employees and employers perceive the policy differently from its intended purpose (Baird et al., 2021).

In Indonesia, menstruation leave was originally introduced as a reproductive health measure, but low uptake persists owing to stigma (Kridasaksana et al., 2020). In Zambia, some women reject the term Mother's Day, believing it reinforces traditional gender norms (Gondwe, 2017). These cultural dimensions significantly influence policy reception and effectiveness.

Future research should explore how cultural perception influences menstruation leave uptake in Zambia, whether the naming of the policy (Mother's Day) affects how employees and employers perceive its legitimacy, and what economic factors influence whether menstruation leave is seen as a right or a privilege. These cultural and economic contexts fundamentally shape policy outcomes.

#### ***2.10.6 Summary: Key Research Gaps & Future Directions***

Current knowledge about Zambia's policy is limited to a few empirical studies, suggesting a need for in-depth case studies and employee/employer perspectives. Comparative studies currently focus on Japan, Russia, and India, indicating a need for cross-national studies including African contexts. Workplace research tends to focus on schools and public health rather than employment settings, highlighting the importance of workplace specific data,

especially in finance and insurance sectors. Regarding impact on careers, current literature offers theoretical concerns about bias but lacks longitudinal studies on hiring and promotion effects. Cultural and economic context research currently relies on assumptions about gender norms, suggesting a need for cultural analysis of policy framing and social attitudes.

**Table 2.3: Research Gaps**

Gap Area	Description
Empirical data in Zambia	Limited field research on use, impact, or perceptions of the Mother's Day policy.
Cross-national comparisons	Few studies compare Zambia's model to other Global South or African contexts.
Workplace specific insights	Little is known about how the policy functions in formal employment settings.
Career outcomes	Lack of evidence on how menstruation leave affects retention, promotion, or hiring.
Cultural framing	Minimal research on how policy language shapes stigma and usage.
Intersectionality and informal work	Limited attention to informal sector workers and non-binary menstruators.

These gaps highlight the multifaceted nature of menstruation leave research and the need for integrated approaches that consider policy, culture, economics, and workplace dynamics simultaneously.

### 2.11 Theoretical Frameworks

This study employs an integrated theoretical framework to explore how menstruation leave policies, specifically Zambia's Mother's Day policy, is implemented and experienced in the workplace. Drawing on feminist organisational theory, postcolonial perspectives, and economic analysis, the framework helps to explain how gender norms, cultural values, and

workplace structures interact in shaping the policy's impact on women's recruitment, retention, and advancement.

### ***2.11.1 Feminist Organisational Theory and Gendered Workplace Structures***

Feminist organisational theory provides a critical lens through which the researcher analyses how workplace structures and policies are inherently gendered, often reflecting and reinforcing broader societal inequalities. This theoretical perspective is particularly relevant when examining gender-specific policies like menstruation leave, as it helps to illuminate how such initiatives might either challenge or inadvertently reinforce gendered power dynamics within organisations.

At its core, feminist organisational theory, as developed by scholars like Acker (1990, 2006), posits that organisations are not gender-neutral entities but are constructed around implicit assumptions of the "ideal worker" – traditionally conceptualised as male, unencumbered by family responsibilities, and possessing a body that does not menstruate, become pregnant, or lactate. This ideal worker becomes the standard against which all employees are measured, creating what Acker terms "inequality regimes" that systematically disadvantage women and other marginalised groups.

When applied specifically to menstruation leave policies, feminist organisational theory reveals several important insights. First, these policies explicitly acknowledge biological differences between bodies, challenging the implicit assumption that the standard organisational body is male. By creating space for menstruation in workplace policies, organisations potentially disrupt the normative ideal of the disembodied worker. As Calás and Smircich (2006) argue, making the gendered body visible in organisational discourse can be an important step towards challenging gendered power structures.

However, feminist organisational theory also cautions that well-intentioned gender-specific policies can sometimes reinforce rather than challenge gender inequality. Putnam and Bochantin (2009) note that policies focused on women's biological needs might inadvertently reinforce essentialist views of gender, portraying women as fundamentally different from or

less capable than men. In the context of menstruation leave, this tension is particularly evident, while the policy acknowledges real physiological needs, it may simultaneously mark women's bodies as problematic or requiring special accommodation in workplace settings.

The theory's application to Zambia's Mother's Day policy is especially revealing. By naming the policy Mother's Day rather than explicitly calling it menstruation leave, the Zambian approach linguistically connects menstruation with motherhood, potentially reinforcing traditional gender roles that primarily define women through their reproductive capacities. This naming convention reflects what feminist organisational theorists identify as the conflation of biological sex, gender identity, and socially prescribed gender roles within organisational contexts (Acker, 1990). Such framing might limit the policy's transformative potential by perpetuating rather than challenging existing gender stereotypes.

Recent developments in feminist organisational theory have expanded to consider intersectionality – how gender interacts with other identity facets such as race, class, and cultural background to create complex patterns of advantage and disadvantage (Mama, 2004; Steady, 2005). This intersectional approach is particularly relevant in the Zambian context, where postcolonial dynamics, socioeconomic factors, and cultural traditions interact with gender to shape women's workplace experiences. For instance, women in different socioeconomic positions or organisational hierarchies might experience menstruation leave policies very differently, with senior women potentially feeling greater pressure to avoid using the leave to maintain professional credibility.

Furthermore, feminist standpoint theory (Harding, 2004) emphasises the importance of putting women's lived experiences in the centre when analysing policies designed to respond to their needs. This perspective suggests that effective analysis of menstruation leave must incorporate the voices and experiences of the women who navigate these policies daily, attending to the strategies they develop to balance health needs, cultural expectations, and professional aspirations. By prioritising women's narratives, this research seeks to understand how menstruation leave operates not just as a formal policy but as a lived reality shaped by complex social dynamics.

Feminist organisational theory also draws attention to the relationship between formal policies and informal organisational practices. While formal policies like menstruation leave may exist on paper, informal organisational cultures often determine how accessible or stigmatised these policies become in practice. As Martin (2003) argues, gendered expectations are reproduced through daily interactions and practices that may support or undermine formal equality initiatives. This theoretical insight guides this study's attention to the gap between policy provision and practical implementation, exploring how organisational cultures either facilitate or hinder women's access to menstruation leave.

In examining the implementation of Zambia's Mother's Day policy through a feminist organisational lens, this research contributes to broader theoretical understandings of how gendered policies operate within specific cultural and organisational contexts. It extends feminist organisational theory by applying it to an African workplace context, exploring how gender, biological needs, and workplace structures interact in postcolonial settings that may differ significantly from the Western contexts where much of this theory was developed.

### ***2.11.2 Postcolonial Perspectives on Workplace Policies***

Postcolonial theory provides a critical framework for understanding how colonial histories and power dynamics continue to shape contemporary workplace policies and practices in African contexts. This theoretical perspective is particularly valuable for examining menstruation leave in Zambia, as it helps to illuminate how workplace policies operate within hybrid environments where indigenous African traditions interact with imported Western management models.

Postcolonial organisational scholars like Nkomo (2011) and Jackson (2004) argue that management and workplace practices in African contexts often reflect an uneasy combination of Western business models and local cultural values. This hybridity creates unique organisational environments where policies designed with Western individualist assumptions may function differently when implemented in more collectivist African contexts. In the case of Zambia's financial and insurance sectors, this tension manifests in the coexistence of formal

corporate structures imported from Western business models alongside informal cultural norms that may significantly influence how policies are interpreted and applied.

Within postcolonial theory, the concept of cultural translation is particularly relevant to understanding how policies like menstruation leave are interpreted and implemented. Bhabha's (1994) work on 'cultural translation' emphasises that when ideas or practices move between cultural contexts, they are not simply adopted but are actively reinterpreted and transformed. This insight helps explain why menstruation leave policies implemented in postcolonial African contexts may function very differently from similar policies in Asian or Western settings. The Mother's Day framing of Zambia's menstruation leave policy, for instance, represents a distinct cultural translation that reflects local understandings and values regarding women's roles.

Postcolonial feminist scholars like Mohanty (2003) and Mama (2004) further emphasise the importance of avoiding universal claims about women's experiences, recognising instead how colonial histories and power relations shape gender dynamics in specific contexts. This perspective challenges the assumption that workplace gender policies developed in Western contexts can be straightforwardly transferred to African settings. Instead, it suggests that effective policies must be grounded in local understandings of gender, work, and health. As Chilisa (2012) argues, indigenous knowledge systems often contain valuable insights about gender relations that may be obscured by imported theories and frameworks.

For menstruation leave policies specifically, postcolonial theory highlights how colonial histories have shaped attitudes toward menstruation and women's bodies in African contexts. Colonial education and religious institutions often introduced or reinforced negative attitudes towards menstruation, portraying it as shameful or polluting (Bobel et al., 2020). These colonial legacies interact with pre-existing indigenous beliefs about menstruation, creating complex cultural attitudes that influence how menstruation leave policies are perceived and utilised today. Understanding these historical dynamics is crucial for analysing the cultural reception of menstruation leave in contemporary Zambian workplaces.

Postcolonial theory also draws attention to the concept of Ubuntu, an African philosophy emphasising communal relationships and shared responsibility. As articulated by scholars like Khoza (2006) and Karsten and Illa (2005), Ubuntu emphasises the interconnectedness of individuals in communities and the importance of mutual care and responsibility. Mangaliso (2001) suggests that Ubuntu influences management practices in African organisations, creating workplace cultures that may prioritise collective wellbeing and harmony. This philosophical framework might shape how menstruation leave is understood in some Zambian workplaces, potentially framing it as part of a broader commitment to community care rather than as an individual entitlement.

However, postcolonial theory also recognises the tensions that can arise when traditional values encounter modern corporate structures. In some cases, employers may support menstruation leave in principle, reflecting Ubuntu values of care and accommodation, while simultaneously hesitating to fully implement it owing to concerns about productivity and efficiency derived from Western business models. This tension reflects what Connell (2014) describes as the ‘contradictory consciousness’ often found in postcolonial contexts, where competing values and systems coexist uneasily.

Postcolonial perspectives also highlight the importance of examining whose voices are centred in policy development and implementation. As Mills and Linn (2022) argue, there remains a significant ‘knowledge divide’ between Global North and Global South contexts, with research and policy often dominated by Western perspectives. This research contributes to understanding this imbalance by centring Zambian experiences and perspectives, examining how menstruation leave functions within specific postcolonial African workplace contexts rather than assuming the transferability of findings from other regions.

By applying postcolonial theory to the analysis of Zambia’s Mother’s Day policy, this research contributes to a more nuanced understanding of how workplace gender policies operate in postcolonial African contexts. It recognises that effective policy implementation requires attention not only to formal structures but also to the complex cultural, historical, and

philosophical frameworks that shape how policies are interpreted and experienced in practice.

### ***2.11.3 Economic Perspectives: Balancing Cost and Gender Equity***

Economic theories offer valuable tools for analysing how employers approach and respond to gender-specific policies like menstruation leave. These perspectives help illuminate the practical considerations that shape policy implementation, particularly in competitive sectors like finance and insurance where productivity and efficiency are highly valued.

Schneider's (1987) ASA framework suggests that organisations with policies supportive of women's health and wellbeing may become more attractive to female employees, potentially enhancing recruitment and retention. According to this model, organisations that offer menstruation leave may attract women who value workplace sensitivity to their health needs, potentially creating a competitive advantage in talent acquisition. This perspective suggests that menstruation leave could function as a positive differentiator for employers seeking to diversify their workforce and attract female talent.

However, economic theories also highlight potential tensions between gender equity goals and employer concerns about costs and productivity. Williamson's (1981) transaction cost theory provides insights into how employers evaluate the economic implications of workplace policies. From this perspective, employers may perceive menstruation leave as increasing transaction costs through potential disruptions to workflow, additional administrative burdens, or perceived unpredictability in staffing. These economic considerations might lead some employers to resist or minimise implementation of menstruation leave, particularly in highly competitive or resource-constrained environments.

The economic tension is particularly relevant in Zambia's financial and insurance sectors, which operate in a competitive global environment where efficiency and customer service are critical to organisational success. Employers in these sectors may view menstruation leave through a cost-benefit lens, weighing the potential benefits of improved employee wellbeing and retention against concerns about productivity impacts or administrative complexity.

Research from countries with established menstruation leave policies, such as Japan and South Korea, indicates that economic concerns often lead to underutilisation of these policies despite their formal existence (Hollingsworth, 2020).

Resource dependence theory (Pfeffer & Salancik, 1978) provides additional insights into how organisations respond to external pressures regarding gender equity. This theory suggests that organisations adopt policies partly in response to external stakeholder expectations and resource dependencies. In Zambia's case, multinational financial institutions or international development partners may exert pressure for gender-inclusive policies, incentivising formal policy adoption. However, this externally motivated adoption may result in symbolic rather than substantive implementation if not aligned with internal organisational priorities or resource allocations.

Furthermore, human capital theory (Becker, 1964) offers a framework for understanding how employers evaluate investments in employee wellbeing and retention. This perspective suggests that employers may be more willing to accommodate the health needs of employees perceived as having high human capital value to the organisation. This could create disparities in policy access, with senior or specialised employees potentially receiving more support than junior or easily replaceable staff. Such disparities may be particularly pronounced in hierarchical sectors like finance, where significant differences exist in how employees at different organisational levels are valued and accommodated.

Feminist economists like Seguno and Braunstein (2019) critique mainstream economic approaches for failing to adequately account for unpaid care work and gender discrimination in labour markets. From this perspective, conventional cost-benefit analyses of policies like menstruation leave may undervalue their potential contributions to workforce participation and productivity by not fully accounting for the costs of excluding women from the workplace or forcing them to work while experiencing significant discomfort. This critique highlights the importance of more holistic economic evaluations that consider both immediate productivity impacts and longer-term benefits related to retention, engagement, and talent development.

In the Zambian context specifically, economic perspectives must be understood within the country's broader development challenges and labour market dynamics. As a developing economy, Zambia faces significant resource constraints and competitive pressures that may influence organisational approaches to workplace policies. Small and medium enterprises, which form a significant portion of the country's economy, may face particular challenges in absorbing the perceived costs of menstruation leave, potentially creating uneven implementation across different organisational sizes and sectors.

By integrating economic perspectives into the analysis of menstruation leave policies, this research acknowledges the practical realities that shape policy implementation while also challenging narrowly defined economic evaluations that fail to account for the full costs and benefits of gender-inclusive workplace practices (Aberdeen, 2013). This balanced approach recognises that sustainable policy implementation requires dealing with both equity goals and legitimate organisational concerns about resources and operations.

#### ***2.11.4 Inclusive Innovation***

This research adopts an inclusive innovation lens to examine how workplace policies intended to promote equality may create new forms of exclusion. Inclusive innovation scholarship emphasises that innovation in policies and practices should reduce inequality rather than exacerbate existing disparities (Heeks et al., 2014). The Mother's Day policy represents an innovative approach to workplace inclusivity, yet its implementation raises important questions about whether such innovation truly serves its intended purpose.

The concept of inclusive innovation emerged from efforts to ensure that marginalised groups benefit from and participate in innovation processes, rather than being excluded from them (Chataway et al., 2014). While initially focused primarily on technological innovation and economic inclusion, the framework has expanded to encompass social, organisational, and workplace contexts, fostering environments where diverse voices contribute meaningfully to innovation and decision-making (Foster & Heeks, 2013). The financial and insurance sectors

provide particularly relevant contexts for examining these dynamics, as they represent areas where women's participation in senior roles remains limited despite formal inclusion policies.

Inclusive innovation is rooted in theories of social justice and participatory development. Freire's (1970) 'Pedagogy of the Oppressed' provides a foundational perspective, emphasising the role of critical consciousness and participatory dialogue in social innovation. Freire argues that true innovation cannot occur in hierarchical structures that exclude marginalised voices from decision-making. Applied to menstruation leave policies, this perspective highlights the importance of including women's experiences and needs in policy design and implementation, rather than imposing solutions designed without their input.

Extending this philosophical foundation, Unger (2015) positions social innovation as a political and structural imperative, highlighting that inclusive innovation must respond to institutionalised inequalities through structural changes rather than incremental adjustments. This perspective aligns with workplace policies that advocate for systemic inclusion rather than superficial accommodations. In the context of Zambia's Mother's Day policy, this raises questions about whether the policy represents a transformative structural change or merely a surface-level accommodation that leaves deeper inequalities intact.

The philosophical dimension of inclusive innovation also raises important questions about embodiment and difference in the workplace. Young's (1990) work on justice and the politics of difference emphasises that true inclusion requires acknowledging rather than erasing differences, creating structures that accommodate diverse bodies and experiences. Similarly, Nussbaum's (2000) capabilities approach argues that equality requires supporting the diverse capabilities of all individuals, including capabilities related to bodily health and integrity. Grosz (1994) explores further how the gendered body is constructed through social and discursive practices, highlighting how women's bodies have historically been positioned as problematic or disruptive in public spaces. These philosophical perspectives help frame menstruation leave as part of broader questions about how workplaces accommodate or marginalise bodily differences and needs.

The connection between inclusive innovation and workplace policies lies in creating equitable opportunities that enable diverse participation (Malhotra & Majchrzak, 2022). In the context of Global South workplaces, inclusive innovation takes on particular importance owing to the complex interplay of gender, cultural, and postcolonial dynamics (UN DESA, 2016). Research by Hamman et al. (2020) challenges the traditional 'colonial' approach to management studies through what they term 'dialogical contextualism', viewing workplaces as collaborative spaces where diverse experiences contribute to innovation. This perspective emphasises the importance of contextually appropriate policies that respond to local realities rather than imported models that may not fit local needs or values.

Ferguson (2021) explores what he terms the 'social obligations of presence' in organisational settings, suggesting that inclusion involves ensuring marginalised groups have power and agency within workplaces, not just physical presence. This aligns with inclusive innovation principles, where individuals from diverse backgrounds are active co-creators rather than passive recipients. Applied to menstruation leave policies, this perspective highlights the importance of women having agency in how they utilise such policies, rather than being subject to externally imposed rules or expectations.

In the Global South context specifically, inclusive innovation scholarship emphasises the need for contextually appropriate solutions that respond to local challenges while drawing on local knowledge systems (Foster & Heeks, 2013). This perspective challenges the uncritical transfer of workplace policies from Western contexts to African settings, encouraging instead the development of approaches that respond to specific cultural, economic, and social realities. Zambia's Mother's Day policy, with its distinctive framing and implementation, represents an example of how global policy concepts are translated and adapted to local contexts.

The inclusive innovation framework also highlights the importance of examining who benefits from and who is excluded by supposedly inclusive policies. As Chataway et al. (2014) argue, innovations intended to promote inclusion may inadvertently create new forms of exclusion if not carefully designed and implemented. This research applies this critical lens to Zambia's menstruation leave policy, examining whether it genuinely supports all women's workplace

participation or whether certain groups of women (such as those in leadership positions or in male-dominated departments) face barriers to accessing its benefits.

Furthermore, inclusive innovation scholarship emphasises the importance of process as well as outcomes. Heeks et al. (2013) argue that truly inclusive innovation requires participatory processes that engage marginalised groups in decision-making rather than treating them as passive recipients of policies designed by others. This perspective raises questions about how women in Zambian workplaces are involved in shaping the implementation of menstruation leave policies and whether their voices and experiences inform ongoing policy refinement.

By applying an inclusive innovation lens to the analysis of menstruation leave policies, this research contributes to broader discussions about how workplace policies can genuinely promote gender equity rather than reinforcing existing inequalities or creating new forms of exclusion. It examines the policy not only regarding its formal existence but also regarding its accessibility, utilisation patterns, and impacts on different groups of women across organisational hierarchies and contexts.

#### ***2.11.5 The Complex Interplay Framework***

Bringing together these perspectives, this study introduces a Complex Interplay Framework that explores how three key forces—organisational structures, cultural attitudes, and gender dynamics—interact to shape the impact of menstruation leave policies.

- **Organisational Structures:** How policies are applied in workplaces of different sizes and formalities, including how HR systems and leadership attitudes influence accessibility and uptake.
- **Cultural Attitudes:** How social beliefs, stigma, and language around menstruation shape women's willingness to use the policy and how employers perceive it.
- **Gender Dynamics:** How workplace hierarchies, peer norms, and leadership expectations affect who use the policy, and how usage may influence career growth.

This integrated framework allows for a more complete understanding of how menstruation leave functions in practice, not just as a written policy, but as a lived experience shaped by

intersecting systems of power, identity, and belief. It provides the analytical foundation for this study, supporting the analysis of findings in later chapters.

## **2.12 Conclusion of the Literature Review**

This literature review explored the evolution, implementation, and impact of menstruation leave policies worldwide, positioning Zambia's Mother's Day as a unique case in the broader discourse on workplace gender equity. By examining menstruation leave from historical, cultural, organisational, and policy perspectives, this review underscored the complexity of gender-specific labour policies and their varied implications for recruitment, retention, and workplace experiences.

A key takeaway from this review is that menstruation leave policies, while intended to support workforce participation, are deeply shaped by societal attitudes, workplace norms, and structural inequalities. In countries like Japan and South Korea, cultural stigma has led to low policy utilisation, while in Spain, state-funded menstruation leave signals a shift towards more progressive labour protections. The Zambian Mother's Day provision stands out as the only formal menstruation leave policy in Africa, yet its impact remains underexplored. This review highlights Zambia's unique positioning in global menstruation leave debates, particularly as a policy that reflects both progressive gender policies and entrenched cultural expectations around caregiving and reproductive roles.

Despite increasing research on menstrual health and workplace policies, this review identified critical gaps in existing literature, particularly in African contexts. There is a lack of empirical research on how menstruation leave policies influence women's career progression, workplace culture, and employer perceptions. The review also highlights uncertainties regarding the long-term effects of such policies on gender equity, particularly in sectors where women remain underrepresented. Furthermore, discussions on menstruation leave tend to be dominated by Asian and European perspectives, leaving the African experience under researched and often excluded from global policy debates.

This study seeks to bridge these research gaps by providing a comprehensive examination of Zambia's Mother's Day policy in the financial and insurance sectors. By investigating how menstruation leave is perceived, accessed, and utilised in professional settings, this research contributes to a more nuanced understanding of whether menstruation leave advances workplace gender equity or reinforces gendered stereotypes and exclusion.

As the discourse on menstruation leave continues to evolve, future research must move beyond policy design to focus on real-world implementation, long-term impacts, and intersectional experiences. This review lays the foundation for such inquiries, ensuring that Zambia's unique policy is critically assessed within its socio, cultural, economic, and organisational context.

The key question emerging from this review is whether Zambia's menstruation leave policy promotes workplace gender equity or creates unintended professional disadvantages for women. By examining this question through rigorous research, we can contribute to more effective and equitable workplace policies that genuinely support all employees.

## CHAPTER 3: METHODOLOGY

### 3.1 Introduction

This chapter outlines the research design and methodology used to explore how Zambia's menstruation leave policy (Mother's Day) influences the recruitment and retention of women in the financial and insurance sectors. The study adopts a qualitative, interpretive approach to examine how this policy is implemented at the organisational level and experienced by women in broader cultural and regulatory contexts.

The methodology is underpinned by an integrated theoretical framework combining feminist organisational theory, postcolonial theory, economic perspectives, and using the Social Ecological Model (SEM) as an analytical framework. These frameworks guide both data collection and analysis, enabling examination of the policy's impact across multiple dimensions: individual experiences, organisational structures, cultural norms, and policy level dynamics.

### 3.2 Research Philosophy and Approach

The study adopts an interpretivist perspective, which emphasises humans' uniqueness because of their ability to create meaning (Saunders et al., 2019). This research seeks to reveal women's lived experiences as a collective, the interpretations and cultural factors that shape them, and employers' perceptions of the policy.

#### ***3.2.1 Research Approach***

An inductive research methodology was employed to account for this study's emphasis on context sensitivity and focus on how people create meaning (Maxwell, 2013). This approach is particularly applicable as it is primarily concerned with understanding local context to unearth new phenomena (Edmondson & McManus, 2007).

The study utilised a qualitative approach as described by Miles and Huberman (2009), who characterise qualitative research as offering grounded and rich descriptions of processes and explanations in local contexts. Within this qualitative framework, a descriptive research approach was applied to systematically characterise the population, situation, and phenomena as recommended by Hyde (2000). Unlike experimental research, the researcher did not control or change any variables, instead observing and measuring them as they naturally occurred.

### **3.3 Analytical Framework: The Social Ecological Model**

The research design was guided by the SEM framework as a sense-making tool. The SEM was particularly instrumental in structuring the research, enabling examination of the policy's impact across multiple levels, from individual experiences to broader organisational and societal influences. This aligned with the study's findings about how organisational size and culture significantly shape policy implementation and effectiveness.

The SEM, originally developed by Bronfenbrenner (1977), provides a comprehensive framework for understanding the dynamic interrelations among various personal and environmental factors. In this study, SEM enabled a structured analysis of how menstruation leave policies are experienced, implemented, and interpreted across different levels of social context. Keith et al. (2022) support this application, affirming that SEM can be effectively utilised in qualitative research to explore human dimensions of complex social phenomena.

The study applied SEM across five distinct layers, each providing unique insights into the policy's impact:

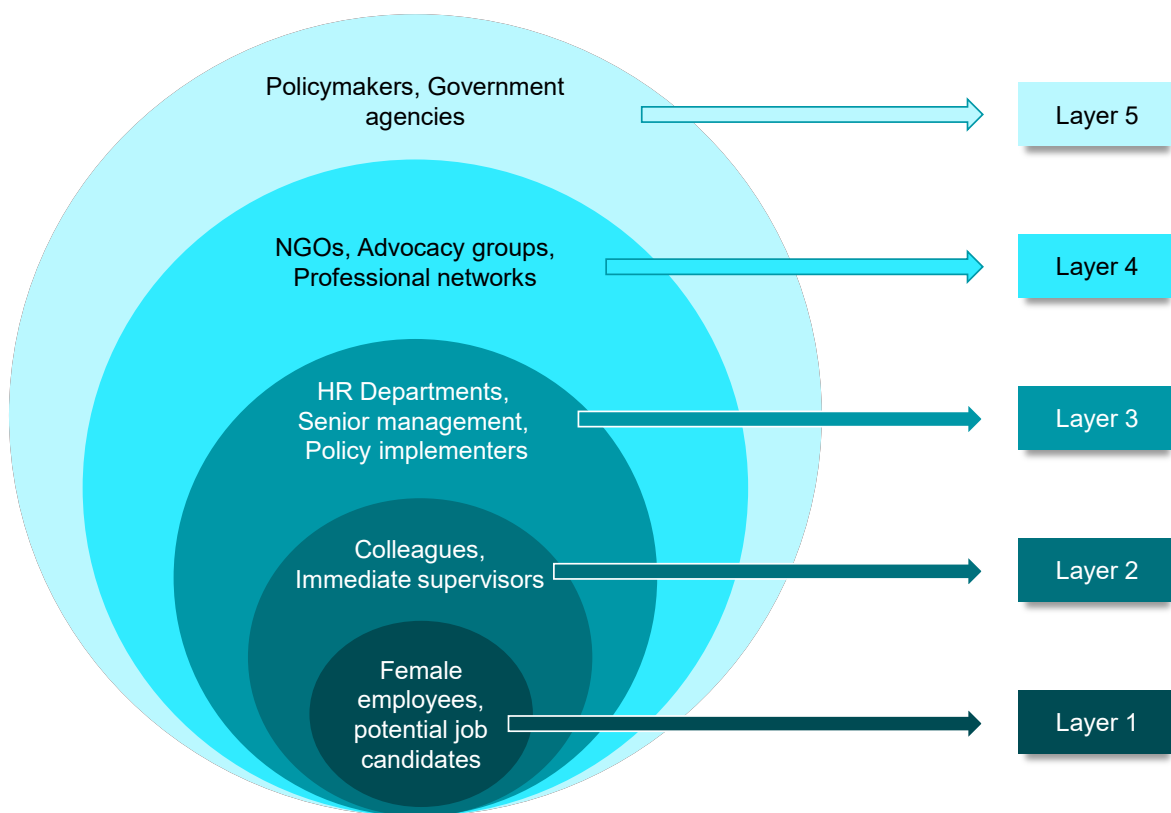
1. **Individual level:** This layer delved into employees' personal perceptions and experiences, with special focus on women. It aimed to uncover the direct impacts of menstruation leave policy on female employees' work-life balance and well-being. Through in-depth interviews, women shared how they personally interpreted, utilised, and experienced the

policy in their professional contexts. This level of analysis captured the lived reality of those the policy was designed to support.

2. **Interpersonal level:** At this level, the research explored immediate supervisors' experiences, prioritising insights from female supervisors while also incorporating perspectives from male supervisors. This was pivotal in understanding the dynamics of support and challenges that the policy might engender at the managerial level. It revealed how interpersonal relationships mediated policy implementation and highlighted the significance of supervisor attitudes in shaping women's comfort in utilising the leave.
3. **Organisational level:** This layer assessed experiences and perceptions of human resources personnel and hiring managers to identify operational implications of the menstruation leave policy. It examined how different organisational structures, sizes, and cultures influenced policy implementation, highlighting the contrast between formal approaches in large organisations and more informal practices in smaller workplaces. The analysis at this level uncovered how the policy influenced hiring decisions, performance evaluations, and career advancement opportunities.
4. **Community level:** The research turned its focus towards advocacy groups and the broader communities that encompass both employees and employers. This allowed for examination of cultural norms, social attitudes, and community expectations regarding menstruation and women's workplace participation. It revealed how external social factors shaped organisational approaches to the policy and influenced women's willingness to utilise it.
5. **Policy level:** At the broadest level, the study examined the government's stance and interpretations of policies and labour codes related to menstruation leave. This included analysis of the Employment Code Act of 2019 and other relevant labour regulations. The policy level analysis provided important context for understanding the regulatory environment in which organisations operate and how official interpretations might differ from practical implementation.

This multilayered approach ensured a comprehensive analysis, considering the complex interplay between individual experiences and broader social, organisational, and policy

contexts. As noted by Arcidiacono et al. (2009), the SEM approach is particularly beneficial in understanding the perspectives and experiences of individuals, as well as in generating new ideas and generalising findings. The analysis of these five layers facilitated a holistic understanding of the menstruation leave policy’s ecosystem, capturing both the formal structures and the lived experiences that shape its effectiveness. Figure 3.1 illustrates the five layers.



**Figure 3.1: Five Layers of the Social Ecological Model**

*Source: Adapted from Bronfenbrenner (1977).*

### 3.4 Research Strategy

The research strategy was carefully designed to capture the multifaceted nature of the menstruation leave policy’s implementation and impact. It incorporated three key elements that guided the methodological approach:

**Interpretive Lens:** This study adopted an interpretive approach to explore how women and employers make sense of the menstruation leave policy in their specific organisational contexts. An interpretive lens recognises that the meaning and impact of policies are not fixed or universal; instead, they emerge through social interactions and are shaped by both individual and collective interpretations. By prioritising participants' own narratives and perspectives, this approach enabled the research to capture the subjective realities that influence the policy's effectiveness. The interpretive approach was particularly suitable for this study as it emphasises understanding subjective experiences and interpreting meaning (Smith & Fieldsend, 2021). Originally developed in psychology, this methodology has proven adaptable and flexible across various disciplines, allowing researchers to deeply engage with and appreciate the nuances of human experiences and perceptions (Smith & Fieldsend, 2021).

**Multi-Level Analysis:** Following the SEM framework, data collection and analysis examined all five distinct levels described previously. This comprehensive approach acknowledged that policy implementation and impact cannot be understood by examining any single level in isolation. Instead, the research design facilitated exploration of the interconnections among individual experiences, interpersonal dynamics, organisational practices, community influences, and policy frameworks. The multi-level analysis was particularly valuable in identifying where disconnects might occur between policy intent and lived experience.

**Cultural Context Sensitivity:** The research design emphasised understanding local cultural contexts and their influence on policy effectiveness. Recognising that menstruation is interpreted differently across cultural settings, the study deliberately incorporated exploration of Zambian cultural norms, taboos, and attitudes regarding menstruation and women's roles in the workplace. This culturally sensitive approach was essential for interpreting findings in their appropriate context rather than imposing external frameworks.

The research was conducted using a combination of complementary methods. Document review provided foundational understanding of formal policies and regulations, including thorough analysis of the Zambian labour code and organisational policy documents. One-on-one interviews constituted the primary data collection method, allowing for in-depth

exploration of sensitive topics in a confidential setting. These interviews uncovered rich insights into participants' subjective experiences, pain points, and views in their contextual surroundings.

The in-depth interviews were particularly valuable for considering the research questions about women's lived experiences and the policy's practical implementation. As Edmondson and McManus (2007) state, 'the open nature of this methodology helps to ensure that researchers identify and investigate key variables throughout the study.' The semi-structured nature of the interviews provided sufficient consistency for cross-case analysis while allowing flexibility to pursue emerging themes and unanticipated insights.

Analysis of relevant documentation, including internal implementation guidelines and communication materials, supplemented the interview data by revealing formal expectations and official narratives about the policy. This triangulation of methods strengthened the validity of the findings and provided a more complete picture of both formal structures and lived experiences.

### ***3.4.1 Sector Selection Rationale***

The focus on the financial and insurance sectors was strategically chosen after careful consideration of which industries would provide the most insightful context for examining menstruation leave policies. These sectors represent environments where formal workplace policies interact strongly with performance expectations and client-facing responsibilities, creating a particularly revealing setting for understanding the policy's implications.

The financial and insurance sectors in Zambia offer a valuable context for examining how Mother's Day interacts with other gendered policies for several specific reasons:

First, these sectors typically maintain structured leave tracking systems that allow for clear documentation of policy use. This characteristic was important for the research as it enabled more precise examination of how the menstruation leave policy is formally recorded, monitored, and evaluated in organisational systems. Unlike sectors with less formal

attendance tracking, financial institutions provided concrete evidence of policy utilisation patterns.

Second, financial and insurance organisations generally operate with established performance metrics that make perceptions of absence particularly visible. In these environments, employee availability often directly affects measurable outcomes, making it easier to trace how leave utilisation might impact performance evaluations and career trajectories. This visibility highlighted the potential tensions between policy availability and career advancement.

Third, these sectors typically employ a mix of junior and senior female employees, enabling analysis of what emerged in the findings as the ‘leadership policy paradox’—whereby women in leadership positions often felt unable to utilise the very policies they were expected to support for their subordinates. This hierarchical diversity provided rich comparative data on how policy utilisation varies across career stages.

Fourth, both sectors maintain a strong emphasis on professional image and client availability, potentially amplifying concerns about leave policies. The client-facing nature of many roles in these sectors created additional complexities around absence management and performance expectations that might not be as pronounced in other industries.

This sectoral focus enabled nuanced examination of how Mother’s Day combines with other gender-specific policies to shape recruitment, retention, and career advancement in environments where employee availability is highly valued. The findings revealed that these sectoral characteristics created specific dynamics around policy implementation that might differ from those in industries with different operational structures and expectations.

### ***3.4.2 Journey Mapping as a Research Tool***

The research incorporated journey mapping as a specialised qualitative research tool to enhance data collection and analysis. Journey mapping, which originated in service design, has been adapted for research purposes to visualise complex processes and experiences over

time. As noted by Robertson (2008) and Naidu (2012), journey mapping enhances the research process through systematic planning and visual representation of participant experiences.

In this study, journey mapping served multiple methodological purposes. First, it provided a structured framework for exploring the recruitment and retention processes in relation to menstruation leave policies. Participants were guided to articulate their experiences as a sequence of events, decisions, and emotional responses, creating a comprehensive timeline of policy interactions from initial awareness through implementation and outcomes.

Second, this technique proved particularly valuable for facilitating difficult dialogues around sensitive topics. The process-oriented nature of journey mapping created a degree of psychological distance that enabled participants to discuss menstruation and its workplace implications more openly than might have been possible with direct questioning alone. As one participant noted during the research process, 'Seeing my experience laid out like this makes it easier to talk about the challenges without feeling like I'm complaining.'

Third, journey mapping provided an in-depth understanding of both employers' and employees' experiences regarding recruitment and retention processes, particularly concerning menstruation leave policy. For employers, it revealed decision-making processes around policy implementation and highlighted concerns about operational impacts. For employees, it captured the evolving nature of their policy engagement, from initial awareness through utilisation decisions and consequences.

The visual nature of journey maps created tangible narratives of experiences and allowed for a more empathetic perspective on the policy's impacts and implementation (Naidu, 2012). These visual representations made patterns more immediately apparent and facilitated comparison across different organisational contexts and hierarchy levels. The journey maps created during the research process became valuable analytical tools that complemented the more traditional thematic analysis of interview transcripts.

Methodologically, the journey mapping process involved: (1) identifying key touchpoints in policy engagement; (2) documenting actions, thoughts, and feelings at each touchpoint; (3)

visualising these elements along a timeline; and (4) identifying pain points, opportunities, and decision factors. This systematic approach added rigour to the exploration of policy experiences while keeping the analysis grounded in participants' lived realities.

### **3.5 Research Population and Sampling**

The target population consisted of employees in the finance and insurance services sector in Lusaka, Zambia. According to the 2022 Lusaka Stock Exchange report (Republic of Zambia, 2022), there are 43 financial institutions and 25 insurance companies in Zambia that provide a range of financial and insurance services.

The selection of participants followed a clear and ethical process to ensure a range of perspectives across different roles and organisation types in the financial and insurance sectors. Organisations were identified using the Lusaka Stock Exchange directory and the researcher's professional networks. They were included based on the following criteria: registration as a financial or insurance institution in Lusaka, at least six months of operation under the Employment Code Act of 2019, and willingness to take part in academic research.

A total of 32 participants were interviewed across four organisations. Participants were selected using purposive sampling based on their roles and experiences with menstruation leave in the workplace. Women employees were prioritised because the policy directly affects them. HR professionals and line managers were included to understand how the policy is interpreted and applied. Male employees were also interviewed to offer a comparative perspective on workplace awareness and attitudes.

Initial contact was made through formal letters sent to HR or managing directors, explaining the study and time requirements. Follow-up calls were made to answer questions and confirm participation. Once an organisation agreed, participants were identified in collaboration with the HR department, but contacted directly by the researcher to ensure privacy. In some cases, snowball sampling was used when participants suggested others who could speak to relevant experiences.

Participants were selected if they met at least one of the following criteria:

- HR professionals involved in leave policies or recruitment
- Managers responsible for supervising staff and approving leave
- Female employees who had worked for at least six months under the current policy
- Male employees who could offer general observations on workplace dynamics

Interviews were arranged at times convenient for participants, including outside work hours where preferred. The researcher took steps to avoid any pressure to participate, especially since access was mediated by HR departments. No incentives were offered. The researcher's position as a Zambian professional with experience in development work may have influenced access or participant comfort, but care was taken to build trust and reduce power imbalances by allowing participants to choose when and where interviews took place.

### ***3.5.1 Sampling Strategy***

Purposive sampling, as described by Cooper and Schindler (2014) and Saunders et al. (2019), was employed to identify organisations in the finance and insurance sector operating in Lusaka, Zambia. This non-probability sampling technique relies on the researcher's judgement to select units that are most representative or informative for the research purposes.

Four organisations were meticulously chosen. These organisations embodied the essential characteristics required to answer the research questions effectively (Maxwell, 2013). The composition factor considered diverse workforce nature, organisational structures, and gender dynamics of leadership and general staff. The location in Lusaka's economic hub was significant as organisations there might exhibit different cultural norms, practices, and levels of gender inclusion compared to those outside the capital.

### ***3.5.2 Sample Size and Composition***

A total of 32 participants were engaged in this research to enable the integration and critical examination of theory and practice, as outlined by McKenna (1997). The sample included representation from diverse organisational sizes and structures in Lusaka, ensuring a comprehensive exploration of policy implementation contexts.

The study focused on four organisations with varying sizes:

- **Organisation 1:** A large organisation with over 250 employees. Ten participants were selected, including human resources personnel, hiring managers, senior managers, and female employees.
- **Organisation 2:** A small firm with 10 employees. Seven participants were included, encompassing human resources personnel, senior managers, female employees, and male employees.
- **Organisation 3:** A medium-sized organisation with 30 employees. Seven participants were selected, including human resources personnel, senior managers, female employees, and male employees.
- **Organisation 4:** A medium-sized organisation with 75 employees. Six participants were engaged, including human resources personnel, female employees, and male employees.

In addition, the study included two external stakeholders:

- A representative from an advocacy NGO, providing insights into women's rights and policy implementation
- A government official from the Ministry of Labour, offering perspectives on policy development and regulatory oversight

Below is a table summary of the sample.

**Table: 3.1: Tools and Sample**

Organisation	Total number of employees	Sample
1	250+	10 participants: 2 HR personnel 2 Hiring managers 2 Senior managers 4 Female employees
2	10	7 participants: 1 HR personnel 2 Senior managers 2 Female employees 2 Male employees
3	30	7 participants: 1 HR personnel 2 Senior managers 2 Female employees 2 Male employees
4	75	6 participants: 1 HR personnel 3 Female employees 2 Male employees
Advocacy group	Undisclosed	1 NGO employee
Ministry of Labour	N/A	1 labour office government official

Note: Total: N = 32. Tool/mechanism: interviews. Data analysis method: thematic coding.

### 3.6 Data Collection Methods

The primary data collection centred on semi-structured interviews conducted with 32 participants across four organisations. As recommended by Gubrium and Holstein (2002), these interviews explored opinions, behaviours, and experiences in depth. Each interview lasted between 45–60 minutes and explored:

- Organisational approaches to policy implementation
- Women’s experiences in utilising the policy

- Leadership perspectives on policy impact
- Cultural influences on policy reception
- Career implications of policy use

The interviews were conducted in private settings, following the guidelines of Saunders et al. (2019) for ensuring participant comfort and confidentiality. All interviews were recorded with participant consent and later transcribed for analysis. The interview protocol maintained sufficient flexibility to explore emerging themes while ensuring coverage of key research questions (Patton, 2012).

### ***3.6.1 Secondary Data Collection***

Secondary data collection complemented the primary research, providing crucial context and background information (Teasdale et al., 2007). The importance of secondary data in enriching research findings has been documented by Boslaugh (2007) and Sayaji (2020) who emphasises its value in providing broader context. The secondary data included:

#### Policy Documents

- Employment Code Act of 2019
- Organisational HR policies
- Internal implementation guidelines
- Policy communication materials

#### Labour Market Information

- Lusaka Stock Exchange reports
- Industry employment statistics
- Gender representation data
- Sector-specific labour reports

### **3.7 Data Analysis**

This study employed a systematic thematic analysis to explore how organisational size, cultural context, and workplace dynamics influence the implementation and impact of Zambia's menstruation leave policy. The analytical approach was guided by Braun and Clarke's (2006) thematic analysis framework, with additional insights from Maxwell's (2013) qualitative research guidelines. This methodological choice aligned with the interpretive nature of the research and its focus on uncovering meanings and experiences across multiple contexts.

#### ***3.7.1 Data Familiarisation and Management***

The analysis began with thorough immersion in the data, following Braun and Clarke's (2006) recommendation that researchers should become deeply familiar with their data before beginning formal coding. Each interview transcript was read multiple times to build a deep understanding of participants' experiences and perspectives. During this phase, initial observations and potential patterns were noted in a research journal, creating an audit trail of emerging insights.

This familiarisation process was deliberately unhurried, allowing time for reflection on the data's nuances and complexities. As Maxwell (2013) emphasises, engaging deeply with raw data is essential for uncovering complex social dynamics, particularly when researching culturally sensitive topics. The familiarisation phase helped to identify preliminary patterns without imposing pre-existing categories on participants' experiences.

Atlas.ti software was used to manage and analyse the qualitative data throughout the analytical process. This software provided a systematic way to organise participants' experiences while remaining flexible enough to capture emerging themes and adjust the analytical framework as new insights developed. The computer-assisted analysis facilitated consistent coding across the substantial dataset while maintaining the richness of individual narratives.

The software was particularly useful for examining differences across various organisational contexts and hierarchical levels, as it enabled efficient comparison of coded segments across different participant groups. For example, it facilitated comparison of how female employees in large organisations described their policy experiences versus those in smaller workplaces, revealing important contextual influences on policy implementation.

### ***3.7.2 Coding and Theme Development***

The coding process followed a structured, iterative approach that built systematically from raw data to integrated themes:

**Initial Coding:** The first coding phase focused on identifying elements such as policy implementation approaches, women's experiences of using (or choosing not to use) the leave, leadership perspectives on the policy's value and challenges, and cultural influences on policy reception. This initial coding remained close to participants' own language and experiences, using in vivo codes where possible to preserve the integrity of their perspectives. The coding was deliberately broad at this stage to capture the full range of relevant content without prematurely narrowing the analysis.

**Code Refinement and Categorisation:** As coding progressed, codes were grouped and adjusted as new patterns emerged. Particular attention was paid to differences in policy implementation across organisations of different sizes, from formal procedures in large companies to informal approaches in smaller ones. Similar codes were consolidated, redundant ones eliminated, and new codes created to capture emerging insights. This refinement phase resulted in approximately 120 distinct codes organised into preliminary categories.

**Theme Development:** Moving from codes to themes involved identifying meaningful patterns across the data that dealt with the research questions. Emerging themes highlighted organisational implementation strategies, cultural integration approaches, and women's responses to the policy. These were compared across cases to understand variations in

organisational contexts. The theme development phase was iterative, with themes being identified, reviewed, refined, and sometimes discarded as the analysis deepened.

**Integration with Theoretical Framework:** The social ecological model (Bronfenbrenner, 1977) structured the interpretation of themes, providing a multi-level perspective showing how individual experiences of the policy were influenced by interpersonal relationships, workplace dynamics, and broader societal factors. This theoretical integration ensured that the analysis extended beyond description to meaningful interpretation of the findings.

Throughout the analysis, detailed analytical memos documented key decisions, insights, and theoretical connections. These memos served both as an audit trail of the analytical process and as a space for developing deeper interpretations of the data. Visual mapping techniques, including mind maps and relationship diagrams tracked connections between themes and patterns across organisations. These visual tools were particularly valuable for identifying complex relationships that might not be immediately apparent in linear text analysis.

Peer debriefing sessions with academic colleagues and participant validation helped ensure credibility by challenging assumptions and verifying key findings. These validation processes sometimes led to refinement of themes or reconsideration of interpretations, strengthening the overall analytical outcome.

### **3.8 Research Quality and Rigour**

Ensuring methodological rigour in qualitative research requires deliberate strategies that differ from those used in quantitative approaches (Shenton, 2004). This section outlines the specific measures employed to establish the trustworthiness and credibility of the research findings.

#### **3.8.1 Validity**

Ensuring validity in qualitative research requires methodological rigour and transparent documentation. As Maxwell (2013) explains, qualitative validity focuses on accurately

representing participants' lived experiences and the phenomena under study, rather than statistical accuracy. Lincoln and Guba's (1985) concept of 'credibility' in qualitative research guided the approach to validity in this study.

In this study of Zambia's menstruation leave policy, validity was ensured through several complementary strategies:

### **3.8.1.1 Respondent Validation**

Respondent validation, also known as member checking, was a core approach to ensure the findings reflected participants' experiences accurately. This process involved taking the preliminary analysis back to participants to verify the researcher's interpretations. Specifically:

- Key findings from each organisational case study were summarised and shared with selected participants from that organisation
- Individual interview summaries were provided to participants who requested them
- Emerging themes were discussed with participants to verify their alignment with lived experiences
- Participants were invited to clarify misunderstandings and add additional context where needed

This iterative process was particularly valuable for sensitive topics such as policy utilisation and career implications, where nuanced understanding was critical. It helped ensure that the researcher's interpretations were grounded in participants' actual experiences rather than preconceived notions. In several instances, participant feedback led to refinement of the analysis, providing more contextually appropriate interpretations of the data.

### **3.8.1.2 Triangulation**

Triangulation was systematically used to deepen the understanding of the policy by incorporating multiple data sources and perspectives, as suggested by Fay (2013). This approach strengthened validity by providing corroboration from different angles and

revealing inconsistencies that warranted further investigation (Noble and Smith, 2015). The triangulation strategy included:

- **Method triangulation:** Combining interview data with document analysis and journey mapping to verify findings across different data collection approaches
- **Source triangulation:** Gathering diverse perspectives from various organisational levels, including entry-level employees, managers, and senior leaders to develop a more complete picture of policy implementation
- **Document analysis:** Comparing organisational policies and implementation guidelines with interview data to identify gaps between formal practices and actual experiences
- **External stakeholder input:** Incorporating perspectives from NGO representatives and government officials to provide a broader contextual perspective that validated findings at the organisational level

When discrepancies emerged between different data sources, these were explicitly explored rather than glossed over, often revealing important insights about the gap between policy intent and lived experience.

### 3.8.1.3 Examining Negative Cases

Negative cases and conflicting evidence were thoroughly analysed, following Maxwell's (2013) guidance on the importance of actively seeking and considering data that challenges emerging interpretations. Instances that contradicted emerging patterns were not treated as outliers to be discarded but as valuable sources of insight that often-revealed critical nuances about how organisational size and culture shaped policy implementation.

For example, when one participant's experience contradicted the general pattern of informal implementation in smaller organisations, deeper investigation revealed important insights about the influence of gender on policy implementation approaches. Rather than forcing data into predetermined categories, the analysis remained flexible enough to accommodate these contradictions and incorporate them into a more nuanced understanding of the phenomenon.

#### 3.8.1.4 Comprehensive Documentation

Detailed records of the research process supported validity and transparency, as recommended by Harper and Cole (2012). These included:

- **Research protocol evolution:** Documentation of how interview protocols developed and changed throughout the research process, with rationales for modifications
- **Analytical decision trail:** Records of key decisions during data analysis, including code development, theme identification, and theoretical integration
- **Methodological adjustments:** Notes on adjustments to research focus or methods in response to emerging findings or practical constraints
- **Interpretive development:** Documentation showing how interpretations evolved through engagement with data and theory
- **Participant feedback:** Systematic recording of participant feedback and how it was integrated into the final analysis

This comprehensive documentation created an audit trail that allows others to understand how and why analytical decisions were made, enhancing the transparency and credibility of the research process and findings.

#### 3.8.2 Reliability

The concept of reliability in qualitative research differs from its quantitative counterpart, focusing on consistency and dependability of research findings rather than strict replicability (Bless et al., 2006). Lincoln and Guba (1985) suggest that 'dependability' more accurately captures the goal of reliability in qualitative research, establishing that the findings are consistent and could be repeated, even if not with identical results. In this study of Zambia's menstruation leave policy, reliability was established through several complementary approaches.

### 3.8.2.1 Systematic Approaches to Data Collection and Analysis

A key aspect of establishing reliability was the systematic application of research methods throughout the study. This included:

- **Comprehensive audit trail:** A detailed documentation system tracked all research decisions and procedures from initial design through final analysis. This audit trail included dated entries documenting methodological choices, analytical insights, and procedural adjustments, providing a chronological record of how the research evolved.
- **Protocol consistency:** Interview protocols maintained consistent core questions for all participants while allowing sufficient flexibility to explore emerging insights relevant to specific contexts. This balanced approach ensured comparability across cases while remaining responsive to the unique aspects of each organisational setting.
- **Systematic data management:** Atlas.ti software provided a structured framework for organising and analysing the substantial dataset. The software's coding system, memo features, and network views enabled consistent treatment of data across all interviews and organisations. Coding categories and definitions were documented in a codebook that evolved throughout the analysis but maintained clear guidelines for application.

### 3.8.2.2 Interrater Reliability

Following Golafshani's (2003) recommendations for establishing reliability in qualitative research, portions of the coded data were reviewed by academic supervisors who were familiar with the research context but not directly involved in the primary coding. This process involved:

- **Collaborative coding sessions:** Regular review meetings with supervisors to discuss coding decisions and analytical interpretations. These sessions involved coding sample transcripts independently and then comparing results to identify areas of convergence and divergence.
- **Disagreement resolution protocol:** A systematic approach for documenting areas of coding disagreement and their resolution through discussion and reference to the data.

When disagreements could not be resolved through discussion, additional context was sought from the data or, when necessary, from participants themselves.

- **Codebook refinement:** Based on feedback from these collaborative sessions, coding categories were refined to enhance clarity and consistency. The codebook evolved throughout the analysis but maintained clear documentation of changes and their rationales.
- **Thematic validation:** Emerging themes were presented to supervisors with supporting evidence, allowing for verification of the logical connection between raw data and interpretive findings. This process helped ensure that themes were well-grounded in the data rather than reflecting the researcher's preconceptions.

### 3.8.2.3 Stability Reliability

Before full deployment, the research instruments were rigorously tested to ensure they would produce stable and meaningful data. As Litwin (1995) recommends, this testing phase focused on both technical and substantive aspects of the research instruments:

- **Pilot interviews:** The interview protocol was tested with a small sample of participants from similar organisational contexts to those in the main study. These pilot interviews assessed whether questions were clearly understood, whether responses yielded relevant data, and whether the overall structure facilitated meaningful discussion.
- **Protocol refinement:** Based on pilot feedback, questions were revised for clarity, and the sequence was adjusted to improve conversational flow. Prompts were added where needed to encourage deeper reflection. These refinements were documented with clear rationale for changes.
- **Timing assessment:** Pilot interviews confirmed that the planned time allocation was appropriate, allowing for sufficient depth without creating participant fatigue. The final protocol included time guidelines for each section to ensure comprehensive coverage.
- **Technical verification:** Recording equipment, data storage systems, and other technical aspects were tested under conditions similar to those of the actual interviews, ensuring reliable data capture.

#### 3.8.2.4 Contextual Consistency

Particular attention was paid to reliability across different organisational contexts, acknowledging that the study's focus on organisational diversity required methodological sensitivity to contextual differences:

- **Context-adaptive questioning:** While maintaining consistent core questions, the interview approach was adapted to the specific language and structures of different organisational settings. For example, terminology for hierarchical levels was aligned with each organisation's structure to ensure questions were contextually appropriate.
- **Cross-context analysis protocol:** A systematic approach to cross-organisational analysis ensured that comparisons accounted for contextual differences rather than treating all settings as equivalent. This included explicit consideration of how organisational size, structure, and culture might influence both participant responses and their interpretation.
- **Contextual documentation:** Detailed notes on each organisational context were maintained and integrated into the analysis, ensuring that findings were interpreted in their appropriate setting rather than decontextualised.

These reliability measures collectively ensured that the research findings represented a dependable account of how Zambia's menstruation leave policy operates across diverse organisational contexts, while acknowledging that qualitative research reliability emphasises consistency of approach rather than uniformity of outcomes.

### 3.9 Research Implementation

The research was meticulously organised into a six-month timeframe, with each phase building upon the previous one:

**Month 1:** Focused on developing personas and establishing first contact with organisations. This period was dedicated to understanding organisation composition, stakeholders,

motivations, business perceptions, and existing gender norms. Concurrently, a checklist of desired practices in hiring processes was constructed.

**Month 2:** Extended exploration of identified areas of interest, with emphasis on corroborating initial findings. Focus groups served as a platform to engage stakeholders and validate preliminary learnings.

**Months 1-6:** Conducted iterative analysis, examining collected information, interlinking various learnings, and generating insightful conclusions. The researcher engaged with key experts across relevant fields, fostering a multi-disciplinary understanding of observed phenomena.

This six-month period allowed for nuanced and in-depth analysis, ensuring that research outcomes were validated and enriched by prolonged observation and engagement with the subject matter.

### 3.10 Limitations of the Study

While this study provides valuable insights, it has several limitations:

- It does not include empirical data comparing productivity of women who take menstrual leave versus those who do not
- The primary focus was on cultural and employment implications, without in-depth examination of economic impacts
- The sample size, while appropriate for qualitative research, limits broad generalisation
- The focus on Lusaka-based organisations may not capture dynamics in other regions

Future research could explore these economic aspects to provide a more balanced evaluation of the policy's overall effectiveness.

### 3.11 Ethics

The study received ethical clearance from the Humanities Ethics Committee at the University of Cape Town (REF:REC 2022/10/004). All participants were provided with an information sheet explaining the purpose of the study, their rights, and how the data would be used. Participation was entirely voluntary, and no financial incentives were offered.

Informed consent was obtained verbally and in writing before each interview. Participants were assured of confidentiality, and pseudonyms were used in all transcripts and reporting to protect their identities. Any identifiable information related to employers or clients was removed during transcription.

Special attention was paid to power dynamics and the sensitivity of discussing menstruation and workplace bias. Interviews were scheduled at times and locations (or platforms) chosen by the participants to promote comfort and autonomy. Participants were reminded that they could skip any question or withdraw from the interview at any point without consequence.

The research also followed University of Cape Town research principles for data storage. Audio files and transcripts were stored on a password-protected device, and access was limited to the researcher alone. Ethical reflexivity was maintained throughout, with regular journaling to reflect on my own positionality and any potential bias introduced during data collection and interpretation.

### 3.12 Chapter Conclusion

This study employed qualitative research methods, particularly semi-structured interviews, thematic analysis, and multiple theoretical frameworks, to explore the nuanced impacts of Zambia's menstruation leave policy (Mother's Day). Qualitative methods enabled in-depth exploration of how individuals and organisations interpret, experience, and respond to the policy in specific contexts.

The semi-structured interview format provided flexibility to probe deeply into individual experiences, capturing subtle nuances that quantitative methods might miss. Thematic analysis, guided by feminist organisational theory and SEM, allowed systematic identification of patterns across multiple levels from individual experiences to broader societal attitudes.

The integration of feminist organisational theory and SEM aligned with the research's golden thread, emphasising the interplay between structural, cultural, and individual factors. This methodological alignment ensured coherence across the thesis, reinforcing the central narrative of understanding policy impacts within the broader context of workplace gender equality and inclusion.

Having outlined the qualitative methodology and analytical framework employed to investigate the influence of Zambia's menstruation leave policy, this chapter has provided a clear foundation for understanding how data was collected and interpreted. The subsequent chapter presents the key findings derived from the analysis and highlights how these insights illuminate the policy's multifaceted impacts on women's recruitment, retention, and career advancement in Zambia's financial and insurance sectors.

## CHAPTER 4: RESEARCH FINDINGS

### 4.1 Introduction

In the rhythms of everyday work life, certain experiences remain largely invisible, yet they shape the wellbeing, productivity, and sense of belonging of many women. Menstruation leave policies, though rare globally, emerge from this hidden reality, aiming to fulfil the unique health needs of women in the workplace. Zambia stands out as the only African country to formalise this practice through its Mother's Day policy. This initiative allows women a day off each month to manage menstruation-related health needs without the need for explanation or justification.

However, this policy signifies far more than a simple day off. It resides at the complex intersection of public health, workplace inclusivity, and gender equality. Zambia's Mother's Day policy, while designed to support women's workplace participation by recognising menstrual health needs, operates within a complicated system of organisational structures, cultural attitudes, and gender dynamics. These factors, in combination, both facilitate and obstruct women's recruitment, retention, and advancement in the financial and insurance sectors.

This research sought to understand how the Mother's Day policy functions in practice through a qualitative study of four financial and insurance sector organisations in Zambia. In-depth interviews were conducted with 32 participants, including female employees across various organisational levels, HR professionals, NGO stakeholders, Government representatives and managers. The study employed purposive sampling to ensure representation across different age groups, career stages, and organisational positions. Data was analysed using thematic analysis, allowing key patterns and contradictions to emerge from participants' lived experiences.

Using the approach of Gioia et al. (2012) in the analysis of the interviews, five major themes were extracted from the interview data, revealing the multilayered nature of the policy's implementation and impact.

1. **The Implementation Paradox:** The research uncovered significant variations in how organisations implement the policy based on their size, structure, and culture. While the policy exists uniformly in law, access to it varies dramatically across workplaces, creating uneven benefits for women.
2. **The Leadership Policy Paradox:** A striking contradiction emerged between policy availability and utilisation patterns across organisational hierarchies. Senior women, who could potentially normalise the policy were instead the least likely to use it creating a disconnect between formal entitlements and practical accessibility.
3. **Strategic Policy Navigation:** Women demonstrated sophisticated strategies for engaging with the policy, balancing their health needs against career implications, workplace stigma, and professional identity concerns.
4. **Recruitment and Retention Dynamics:** The policy's existence influences hiring practices and career advancement in subtle but significant ways, interacting with other gender-specific entitlements to shape women's employment trajectories.
5. **Multi-level Systemic Interactions:** The policy's effectiveness is shaped by interactions across multiple levels, from national legislation to individual decision-making, highlighting how policy intentions can be transformed through implementation.

These themes collectively demonstrate that while Mother's Day represents a progressive step in recognising women's workplace needs, its implementation and impact are far more complex than its legal framework suggests. The following sections explore these themes in detail, drawing directly from participants' experiences to illuminate the tensions between policy intent and lived reality in Zambia's financial and insurance sectors.

## 4.2 The Implementation Paradox: How Organisational Characteristics Shape Policy Access

The research revealed distinct patterns in how organisations implement the Mother's Day policy, with significant variations based on organisational size, structure, and culture. These differences create what can be termed an implementation paradox. While the policy exists uniformly in law, access to it varies dramatically across workplaces, creating uneven benefits for women.

### 4.2.1 Size-Based Implementation Variations

In large organisations (250+ employees), the implementation of the Mother's Day policy follows highly formalised processes, requiring extensive documentation and in some cases multiple approvals. These organisations prioritise compliance to mitigate legal risks and protect their corporate reputation. However, while these organisations officially uphold the policy, bureaucratic hurdles often discourage women from using it. One HR manager described the extensive steps required:

*You have to send an email. You have to do some handover notes... you almost have to notify everyone. P3.*

Another participant highlighted how the structured approach could be alienating:

*...You're supposed to schedule your Mother's Day leave because we know when we have our periods... So you would tell your manager.... in advance. P5.*

While these formal processes help organisations with workforce planning, they also create unintended consequences for employees. The requirement to notify supervisors in advance and justify the menstruation leave conflicts with the policy's original intent, which was to provide women with autonomy and flexibility. The expectation of advance scheduling also contradicts the unpredictable nature of menstruation. This rigid approach prioritises

organisational efficiency over employee wellbeing, as some employees viewed the administrative burden as excessive, ultimately opting not to use the leave:

*...There are those that never take Mother's Day because it's too much admin. Like, I've never seen any MD on their leave, so probably they are either taking a normal leave day or just suck it up. P23.*

The study found that in medium-sized organisations, implementation was more flexible but inconsistent, largely dependent on managerial discretion. Some supervisors actively encouraged employees to take leave, while others were less supportive, leading to uncertainty among workers. One participant noted how individual leadership styles influenced access:

*I know of some supervisors... They'll say, 'Let me lead by example'. P4.*

The research found that the lack of clear government guidelines further exacerbated these inconsistencies, making access to the Mother's Day leave dependent on managerial attitudes rather than standardised procedures. Many participants expressed frustration with arbitrary refusals:

*I have heard of situations where employees have gone to ask their supervisors for Mother's Day leave and they've been told, 'No, you could have picked a better day', or 'You're always asking'. P7.*

This ambiguity and refusal directly contradict Zambia's Employment Code Act No. 47 of 2019, which states that:

*A female employee is entitled to one day's absence from work each month without having to produce a medical certificate or give a reason to the employer.*

In small organisations, policy implementation was highly informal, relying on trust and direct communication. Employees often assumed that they could take the leave without issue but acknowledged that formal procedures were rarely followed. While this informal approach reduced bureaucratic barriers, it also led to ambiguity in how the policy was applied. Some employees reported that while they technically had access to the leave, there was no clear

mechanism to request it, leading to situations where they either felt hesitant to ask or assumed they could not take it:

*I guess maybe it's just taken for granted that okay, if you ask, they'll give it to you because by statute it's there, but it's not normally there. P11.*

Another interviewee from a small firm where women made up 80% of the staff noted that despite the high proportion of female employees, their contracts did not explicitly mention Mother's Day:

*Where I work, for example, our contracts do not say that we're entitled to Mother's Day. We are entitled to leave, but it doesn't categorically say, 'This is Mother's Day'. P2.*

This sentiment expressed by Participant 2 was frequently echoed across interviews. The predominantly female composition of the organisation did not necessarily translate into increased utilisation of the Mother's Day policy in the organisations studied for this research.

#### **4.2.2 Cultural Integration in Implementation**

Participants described notable differences in how organisations integrated cultural values into policy implementation. These differences were particularly evident between head offices and regional branches, suggesting that policy application is also influenced by geographic and cultural factors:

*In my environment, at head office where I'm working, it's positive. But in the regional office, I hear people complaining. P15.*

Cultural discomfort around menstruation further complicates implementation. Another participant explained:

*You never let anybody know that you're menstruating. You have to pass a note to your friend... even if you are in pain. P9.*

This indicates that while national labour policies set broad guidelines, implementation is still shaped by local workplace cultures and managerial discretion. One HR manager acknowledged these challenges:

*Our organisation tries to balance traditional values with modern business needs. It's not always easy. P18.*

#### **4.2.3 Implementation Challenges**

Across all organisational sizes, participants identified several common challenges:

**Scheduling and Coverage:** Organisations struggled with balancing workloads when multiple employees requested leave. This was particularly difficult for smaller teams with fewer backup personnel. Some managers attempted to work around this by encouraging early notice, though legally, such a requirement was not enforceable:

*Most of my team are women... But I have a system. I plead with them to let me know beforehand, and say to them, 'If you can't, by law, you can take it without letting me know.' But I always tell them... P25.*

**Communication Barriers in Gendered Environments:** The research uncovered communication barriers surrounding the Mother's Day policy, particularly in male-dominated work environments. Menstrual stigma created uncomfortable dynamics that effectively silenced discussions about the policy, ultimately leading to women giving different excuses to access their leave entitlement. This stigma operated across different organisational contexts but manifested most strongly in environments with predominantly male leadership or colleagues.

Participants experiences revealed how this stigma spans both educational and professional settings, suggesting its deep societal entrenchment. One particularly illustrative example came from a participant who recounted her daughter's confrontation with a male teacher questioning her bathroom visits:

*She said, 'Why are you asking me what I'm going to do at the bathroom? If I tell you I'm going to change my pad, what are you going to say?' P3.*

This anecdote demonstrates how questions about basic bodily functions become problematic when related to menstruation, creating unnecessary scrutiny and discomfort. The fact that this example involved a student suggests that these communication barriers are established early and carried into professional environments.

The research found that this discomfort persists among professional adults, requiring women to develop strategic communication approaches when discussing menstruation-related needs. As one participant articulated:

*There are still people who see menstruation as a taboo. You must not say it. You must use another way to describe it, and maybe, if he's wise, he'll pick it up. P27.*

This statement reveals several important dimensions of workplace communication barriers. First, it highlights the linguistic gymnastics women must perform, developing euphemisms and indirect language to discuss a natural biological process. Second, it places the burden on women to find acceptable ways to communicate their needs rather than organisations developing clear, destigmatised channels for policy use. Finally, the phrase *if he's wise, he'll pick it up* illustrates how these indirect communications create additional uncertainty, as women cannot be sure their needs will be correctly interpreted.

These communication barriers ultimately transformed what should be a straightforward workplace entitlement into a complex negotiation, requiring women to navigate both explicit and implicit messaging about acceptable topics of workplace discussion.

**Policy Inconsistencies and Interpretive Ambiguity:** Beyond communication challenges, the research identified problematic inconsistencies in how the Mother's Day policy was formalised and interpreted across organisations. Participants consistently noted that employment contracts lacked specificity about the policy's purpose and parameters, creating space for contradictory interpretations. As one participant explained:

*While the contract will make a provision for Mother's Day, it's very vague. It will just say something like 'The employee is entitled to one day, Mother's Day in a*

*month'. But it won't go into details to say whether this is menstrual leave or not.*  
**P32.**

This contractual vagueness had several important consequences. Without clear policy definitions, employees developed varied understandings of the policy's purpose, with some viewing it as specifically for menstrual health, others as general women's health leave, and still others as simply an additional personal day. This diversity of interpretations created inconsistent utilisation patterns and sometimes led to perceptions of policy misuse.

The research found that this ambiguity created tensions around how employers monitored leave use. In the absence of clear guidelines, some managers imposed their own interpretations and expectations. One telling example emerged from a participant's account:

*One employee took Mother's Day, but then a picture of her at a salon was posted online. Her manager said 'I'm going to charge her because she said she was on Mother's Day, but she was plaiting her hair'. P1.*

This incident reveals how policy vagueness enables potentially intrusive monitoring of employees' activities during leave. Despite the Employment Code Act specifying that women need not provide reasons for Mother's Day leave, the lack of clear policy communication created situations where managers felt entitled to judge appropriate versus inappropriate use. The monitoring of social media activity and subsequent workplace discipline represents a concerning extension of organisational control into employees' personal time.

This particular finding highlights a fundamental tension at the heart of the Mother's Day policy: while it ostensibly offers women autonomy to manage their health needs without explanation, the ambiguous implementation creates conditions where that autonomy is undermined through informal surveillance and judgement. The contradiction between legislative intent and organisational practice emerged as a significant barrier to women confidently utilising their leave entitlements.

Together, these communication barriers and policy inconsistencies transformed what was designed as a supportive workplace policy into complex social and professional negotiation

for many women, requiring them to balance health needs against reputational concerns and organisational expectations.

#### **4.2.4 Implications of the Implementation Paradox**

The findings highlight that despite the uniformity of the Mother's Day policy in law, its implementation varies dramatically across different organisational contexts, creating uneven access and benefits for women. This implementation paradox has several implications:

1. **Legal vs. Practical Entitlement:** While women are legally entitled to menstruation leave, practical access depends on organisational structures, managerial attitudes, and workplace culture.
2. **Bureaucratic Barriers vs. Informal Uncertainty:** Both formal and informal implementation approaches create obstacles, either through excessive administrative requirements or through lack of clear procedures.
3. **Compliance vs. Support:** Organisations often approach the policy as a compliance issue rather than as a supportive measure, limiting its potential benefits for women's workplace participation.
4. **Individual vs. Systemic Barriers:** While individual managers influence policy access, broader systemic factors such as organisational structure and cultural attitudes shape overall implementation patterns.

These findings suggest that to enhance the effectiveness of the Mother's Day policy, attention must be paid not only to its legal framework but also to the organisational contexts in which it operates. Clear implementation guidelines, cultural sensitisation, and organisational support structures are needed to bridge the gap between policy intent and practical reality.

This research uncovered a striking contradiction in how the Mother's Day policy functions across different organisational levels. Despite being available to all female employees in theory, in practice the policy is used very differently depending on a woman's position in the workplace hierarchy. This creates what can be termed a *leadership policy paradox* - a situation

where those with the most authority to normalise the policy are typically the least likely to use it.

#### **4.2.5 Senior Women's Avoidance Patterns**

The data revealed a clear pattern of senior women deliberately avoiding the use of Mother's Day leave. This avoidance was not simply personal preference but reflected deeper concerns about professional image and credibility. For women in leadership, taking menstruation leave often felt incompatible with maintaining authority and demonstrating commitment to their roles.

As one senior executive candidly explained, this avoidance stems from perceived pressure to match traditional workplace expectations:

*When you look at the women that are either founders or heading big corporations, you'll find that most of them are inclined towards trying to get rid of that policy. It's like a fight to prove to the men that we're not lazy. P23.*

This insight reveals how senior women often feel caught in a difficult position - while they might support the policy in principle, using it themselves could undermine their hard-won professional standing. The pressure to prove their value through continuous presence creates a powerful disincentive to utilise health-related accommodations.

The avoidance by female leaders doesn't just affect them personally - it establishes powerful unspoken norms throughout the organisation. Junior staff closely observe leadership behaviours and adjust their own accordingly, as noted by another participant:

*I don't think there was any female manager that ever took her MD. And so they used that as a way of telling the junior staff, if your managers can't take their MD, you can't take it either. P17.*

This observation highlights how leadership behaviour creates informal expectations that may contradict formal policy entitlements. When senior women avoid using Mother's Day, they

unintentionally send a message that the policy is incompatible with career advancement or professional seriousness.

Some employees deeply internalised these messages, coming to view the policy itself as potentially undermining women's professional standing:

*If you require that one day off... it really emphasises the fact that we are apparently the weaker sex. P28.*

This statement reveals how some women have internalised the notion that using health accommodations signals weakness rather than legitimate self-care. The characterisation of women as the weaker sex for attending to their health needs reflects how deeply gendered workplace expectations can become embedded in organisational cultures.

Together, these patterns create a troubling cycle: as women achieve leadership positions where they could potentially normalise menstruation leave through their own example, they instead feel compelled to distance themselves from it. This reinforces rather than challenges the existing workplace norms that make the policy difficult to use without professional penalties.

#### **4.2.6 Departmental Variations Based on Gender Composition**

The research found striking differences in how the policy functioned across departments with different gender balances. In female-dominated teams, the Mother's Day policy often became normalised through collective management. Women in these environments developed coordinated approaches to ensure everyone could access the leave while maintaining team productivity.

A participant from a primarily female department explained their practical approach to balancing individual needs with operational requirements:

*Most of us are female, so you need to plan it in such a way that everyone gets a chance to take their Mother's Day within the month. P30.*

This coordinated strategy stands in stark contrast to experiences in male-dominated departments, where women frequently encountered scepticism, scrutiny, and implicit or explicit pressure to justify their leave. The discomfort in these environments created additional barriers to policy use, as one participant described:

*Mostly the experience that I've had is that they look at it as an inconvenience. Sometimes I've heard situations where they need you to explain. P26.*

The characterisation of menstruation leave as an *inconvenience* reveals how the policy was often viewed primarily through its impact on operational requirements rather than its health benefits. This framing places women in the difficult position of having to choose between workplace harmony and personal health needs.

This scrutiny was particularly pronounced when male managers oversaw policy implementation. Their lack of personal experience with menstruation sometimes led to dismissive or inappropriate responses, as another participant recounted:

*Men don't understand it, and they feel like we're making excuses. I had one boss who would joke, 'So you all get your periods at the same time?' when we requested leave. P8.*

This account illustrates how humour could be used to undermine policy legitimacy, with the manager's joke implying suspicion about the genuine need for leave. Being required to tolerate such scepticism created an additional emotional burden for women who simply needed to access their entitled leave.

These departmental differences highlight how policy implementation is shaped not just by formal guidelines but also by team cultures and gender dynamics. The same policy could function as either a normalised health accommodation or a contested workplace disruption depending on the gender composition of the immediate work environment.

#### 4.2.7 Age and Career Stage Influences

The research uncovered distinct patterns in policy use across different age groups and career stages, revealing how generational perspectives and career priorities shape engagement with gender-specific policies.

Younger women at early career stages (20s to early 30s) showed the highest comfort with utilising Mother's Day leave. These employees typically had stronger peer support networks and were more willing to openly discuss menstrual health needs, reflecting potentially shifting generational attitudes towards workplace health accommodations.

Women in mid-career stages (mid-30s to 40s) demonstrated more strategic policy use, carefully weighing immediate health needs against broader professional and personal considerations. One participant articulated how competing priorities influenced her decision-making:

*Especially when you are a family person, you will find yourself hesitating to take it [Mother's Day] because it's work first, then family second. P22.*

This statement reveals the complex balancing act many mid-career women perform, navigating work responsibilities, family obligations, and personal health needs. The hesitation described suggests that even when women acknowledge their need for the leave, other priorities often take precedence.

Women in later career stages (45+) showed the lowest rates of policy utilisation. Some expressed scepticism about the policy's necessity, while others perceived it as potentially creating workplace tensions:

*The females are always difficult. They always complain when you get MD [Mother's Day]. P8.*

This comment illustrates how some older women have internalised negative perceptions of the policy, viewing it as a source of workplace division rather than a legitimate health accommodation. The characterisation of other women as *difficult* for questioning policy use

reveals how gender-specific policies can sometimes create tensions between women themselves.

These age-related patterns suggest a generational divide in attitudes towards menstruation leave. While younger women increasingly view the policy as a legitimate workplace entitlement, older women who advanced their careers without such accommodations may view it through a different lens, having internalised workplace norms that expect women to work through discomfort without special consideration.

#### ***4.2.8 The Influence of Workplace Structures***

Beyond cultural factors, the research identified specific organisational structures that shaped women's ability to use Mother's Day leave. Some organisations had established systems that, while ostensibly supportive, actually reinforced problematic assumptions about women's reliability and availability.

A particularly revealing example came from a participant who described how her organisation structured staffing to accommodate potential absences:

*In certain roles that I've held, there was always a male counterpart that was employed almost like, how can I explain? Almost like a double. They're not necessarily your assistant, but they are there to almost cover for you in case something happens with your child or whatever. P10.*

This structural arrangement, while perhaps intended as practical support, sends a powerful implicit message: women's careers require special contingency planning because their presence is inherently less reliable than men's. The assignment of male *doubles* specifically to female employees communicates an expectation of absence that shapes how women themselves view their professional obligations.

The participant's difficulty in precisely naming this role (*almost like a double*) suggests its ambiguous nature - neither officially an assistant nor a co-lead but functioning as a safeguard

specifically for female employees. This ambiguity allows organisations to maintain such arrangements without explicitly acknowledging their gendered assumptions.

Furthermore, the participant's mention of *something happens with your child or whatever* indicates how organisations often conflate various gender-specific needs - menstruation, childcare, and other caregiving responsibilities - into a general expectation of female absence. This blending of distinct issues reinforces broader stereotypes about women's primary identities as caregivers rather than professionals.

#### **4.2.9 Implications of the Leadership Policy Paradox**

The leadership policy paradox revealed by this research has several profound implications for workplace gender equity.

First, it creates a situation where formal policy entitlements exist on paper but remain functionally inaccessible owing to powerful informal expectations. When the most visible and successful women in an organisation avoid using Mother's Day leave, they inadvertently signal that policy use is incompatible with career advancement.

Second, it places the burden of cultural change on individual women who must weigh personal health needs against professional consequences. This individualisation of a structural issue means that each woman must navigate the policy largely alone, without clear organisational support for their choices.

Third, it creates uneven workplace experiences for women based on their specific department, team culture, and position within the organisational hierarchy. The same policy that one woman can comfortably use might represent a career risk for another, creating inequitable access to health accommodations.

Finally, the paradox perpetuates a workplace culture that still fundamentally expects employees to conform to traditionally male patterns of continuous presence and availability. Despite formal recognition of female-specific health needs, the underlying expectation remains that successful professionals should not require such accommodations.

Dealing with these implications requires moving beyond simply providing policy entitlements to actively reshaping workplace cultures and expectations. Until senior women feel comfortable utilising Mother's Day leave, and organisations recognise that policy use should not carry professional penalties, the paradox will continue to undermine the policy's intended benefits.

### **4.3 Navigating Stigma: Women's Strategic Policy Engagement**

This research reveals that women's interactions with the Mother's Day policy go far beyond simple use or non-use. Rather than passively accepting workplace policies, women actively develop sophisticated strategies to navigate menstruation leave in complex professional environments. Their approaches are influenced by workplace culture, career aspirations, and the persistent stigma surrounding menstruation in professional settings.

#### ***4.3.1 Diverse Policy Interpretations***

The findings uncovered three distinct ways women interpret and utilise the Mother's Day policy, each reflecting different understandings of its purpose and scope. These varying interpretations demonstrate how women adapt formal policies to resolve their specific needs while navigating workplace expectations.

The most prevalent interpretation was as a broad support mechanism for women's multiple roles. Many participants viewed the policy as aligning to women's diverse responsibilities beyond menstruation itself. This broader framing connected the policy to Zambia's historical context and women's roles as caregivers, though the research found no concrete evidence linking the cited historical figures to the policy's origins:

*It wasn't directly related to menstruation leave, but also for nursing mothers... It's one of those leaves that don't require reasoning or support. P3.*

This expansive interpretation made the policy more accessible and widely applicable, helping women meet various needs without explicitly discussing menstruation. However, this

flexibility also created tensions, as the broad interpretation led some managers to question policy use they deemed inappropriate creating a grey area around legitimate utilisation.

The second common interpretation framed Mother's Day as general wellness leave, focusing on overall physical and mental health rather than specifically menstruation. This understanding emerged particularly among women balancing demanding professional responsibilities with household duties:

*A rest day, I would say... So, it's just a day when I, yeah, just a rest day, really. P4.*

The hesitation and repetition in this statement—*just a rest day, really*—suggests a certain defensiveness, highlighting how women felt the need to justify their leave use even when discussing it during research interviews. This wellness interpretation offered women a way to resolve burnout and exhaustion without specifically invoking menstruation, potentially avoiding associated stigma.

The third interpretation, surprisingly the least common despite being the policy's presumed original intent, focused specifically on menstrual health needs. Women who embraced this interpretation typically described severe menstrual symptoms that genuinely interfered with work performance:

*Menstruation leave... it's a leave that you are given when you're basically not able to work. Your health is failing you to do your normal routine. P9.*

The characterisation of menstruation as a health condition where *your health is failing you* reveals how some women needed to frame normal biological processes as medical issues to justify leave use. This medical framing potentially helped legitimise the leave in workplace contexts where productivity is prioritised over wellbeing.

For women experiencing significant menstrual discomfort, the policy provided crucial support:

*Usually, I get Mother's Day when I'm about to because it's like a sickness period I go through. I normally want to take a day off just to position myself in the way I'm feeling. P15.*

The description of menstruation as *a sickness period* further demonstrates how medical language helps justify legitimate health needs in workplace settings. The phrase *position myself in the way I'm feeling* suggests careful self-management, indicating that these women were not simply avoiding work but actively managing their health to maintain overall productivity.

These varied interpretations reveal how women adapt formal policies to fit their needs while navigating organisational expectations. However, the diversity of interpretations also creates inconsistency in how the policy functions, potentially undermining its effectiveness as a specific support for menstrual health.

#### **4.3.2 Strategic Navigation of Policy Use**

Beyond varied interpretations, the research uncovered sophisticated strategies women develop to manage Mother's Day leave use. These strategies reveal the complex calculations women make to balance health needs with professional considerations.

Women carefully considered timing and workload implications when planning leave use. In female-dominated departments, this often-involved collaborative planning to ensure operational continuity:

*Most of us are female, so you need to plan it in such a way that everyone gets a chance to take their Mother's Day within the month. P30.*

This coordinated approach demonstrates women's awareness of organisational needs alongside their own health requirements. Rather than simply taking leave when needed, they engaged in complex collective scheduling to accommodate everyone while maintaining workplace functioning.

In contrast, women in male-dominated environments faced significantly different considerations, often avoiding policy use altogether owing to heightened visibility and scrutiny:

*If you're the only woman in the department, you feel guilty taking the day because then you are seen as the weak one. P3.*

This powerful statement reveals how isolation amplifies stigma, with the participant explicitly linking policy use to being perceived as *the weak one*. This finding highlights how gender composition dramatically shapes policy accessibility, creating inequitable experiences for women across different workplace environments.

Beyond timing considerations, women developed specific communication strategies to manage stigma during the leave request process. Many deliberately avoided mentioning menstruation, instead using vague language to minimise discomfort:

*It's just the awkwardness around mentioning it that really makes it uncomfortable to even take [leave]. P27.*

The phrase *even take [leave]* reveals how communication barriers don't just create awkwardness, they can prevent women from accessing entitled benefits altogether. This finding demonstrates how linguistic, and communication challenges create practical barriers to policy access.

Women also navigated deeply rooted cultural attitudes towards menstruation, balancing traditional taboos with professional needs. Some participants drew direct connections between historical practices and contemporary workplace attitudes:

*In the village... girls on their period bathe at the end of the stream because it's considered impure. P27.*

By referencing this traditional practice, the participant illustrates how concepts of impurity and shame continue to influence modern workplace settings. The physical separation of

menstruating girls in traditional contexts parallels the workplace expectation that menstruation should remain invisible and unacknowledged.

This cultural burden creates significant pressure for women to conceal not just menstruation itself but any associated discomfort:

*You have to conceal by all means, even if you are in pain. They must not know what is happening. It's like something unspoken. It's this taboo, it's this thing that we just pretend does not exist. P27.*

The repetitive emphasis on concealment—*conceal by all means, must not know, something unspoken, just pretend does not exist*—powerfully illustrates the layers of silence surrounding menstruation in the workplace. The phrase *even if you are in pain* highlights the physical cost of this concealment, with women enduring discomfort to maintain professional appearances.

#### **4.3.3 Implications of Women's Strategic Policy Engagement**

These findings reveal several important implications about how women engage with the Mother's Day policy. Rather than simply accepting or refusing leave, women actively navigate complex terrain through strategic decision-making.

Women consistently reinterpret policy purpose to fit their specific needs and workplace contexts. This adaptation shows remarkable resourcefulness but also indicates policy ambiguity that makes consistent implementation difficult. When women must individually interpret policy purpose, their access becomes dependent on personal confidence and workplace position rather than consistent entitlement.

The constant balancing of health needs against career implications creates additional burdens beyond the physical experiences of menstruation itself. Women engage in complex risk assessments, weighing immediate health benefits against potential long-term career impacts. This additional layer of consideration represents invisible labour that men in the same workplace typically do not face.

Women develop sophisticated communication and timing strategies to minimise stigma while accessing needed support. These strategies from vague language to careful scheduling require significant emotional and cognitive effort, essentially taxing women with additional work to access basic health accommodations. This strategic navigation, while demonstrating women's agency, should not be necessary to access straightforward workplace entitlements.

Perhaps most significantly, women constantly navigate tensions between traditional cultural attitudes and modern professional expectations. The workplace becomes a site where historical taboos meet contemporary policies, placing women in the difficult position of bridging contradictory expectations. This tension is particularly pronounced in Zambian contexts, where traditional views of menstruation as private or even shameful conflict with formal policy recognition.

These findings demonstrate that women are far from passive policy recipients, they actively engage with, reinterpret, and strategically navigate workplace policies to meet their needs while protecting their professional standing. However, this agency comes at a significant cost, requiring additional emotional and strategic labour that their male colleagues do not face.

For the Mother's Day policy to achieve its intended purpose, organisations must consider not just formal policy provisions but also the cultural and organisational contexts that shape how women experience the policy. Simply having a policy on paper proves insufficient when powerful informal norms determine its accessibility and acceptability. Reducing stigma, clarifying policy intent, and creating genuinely supportive workplace cultures are essential for ensuring that women can access menstruation leave without facing career penalties or emotional burdens.

#### **4.4 The Recruitment and Retention Impact: Employer Perspectives and Practices**

The research reveals a complex relationship between Zambia's Mother's Day policy and employer attitudes towards hiring and retaining female employees. While designed to support women's workplace participation, the policy exists in a broader ecosystem of

assumptions, operational concerns, and gender biases that significantly influence its practical impact on women's employment opportunities.

#### **4.4.1 Resource Management Perceptions**

Employers in the study frequently framed menstruation leave through a resource management lens, focusing primarily on operational impacts rather than employee wellbeing benefits. Many viewed the policy not in isolation but as part of a constellation of gender-specific entitlements that collectively affect staffing decisions.

This perspective was captured clearly by one participant who described how previous employers openly discussed such considerations:

*My previous employer always joked about how hiring women meant extra leave days, saying, 'You've got Mother's Day, then maternity leave, and more.'* **P6.**

Though presented as humour, this comment reveals how deeply entrenched the perception of women as high maintenance employees has become in some workplaces. The casual nature of the remark suggests this perspective is not viewed as discriminatory but rather as pragmatic business thinking, normalising potential bias in hiring decisions.

The research uncovered particularly concerning patterns in smaller organisations, where limited workforce redundancy created heightened sensitivity to potential absences. An HR professional with insight into multiple companies' practices explained:

*... a lot of smaller companies are preferring to hire men because they know, okay, this man will be with us maybe for one year, for two years, even if he's married...*  
**P29.**

This statement reveals how the Mother's Day policy, combined with other gender-specific leave provisions, created a calculation whereby women were perceived as presenting higher *absence risk* than men. The specific mention of marriage is telling, suggesting that even marital status affected perceptions of male employees' reliability differently than female employees,

with married men viewed as stable employees while married women were seen as potential absence liabilities.

These resource-focused perspectives had particular implications for women's access to leadership positions, where continuous presence and availability were often implicitly expected. By viewing women's health needs primarily as operational disruptions rather than legitimate wellbeing requirements, some employers created an environment where women's advancement opportunities were subtly yet systematically limited.

#### **4.4.2 Impact on Hiring Practices**

Beyond general perceptions, the research uncovered specific ways the Mother's Day policy influenced recruitment processes, often manifesting in subtle screening practices that disadvantaged female candidates. These practices went beyond stated job requirements to probe into women's personal lives and circumstances.

One participant described how organisations gathered information to assess women's potential *absence risk*:

*First of all, if you're a married woman, HR wants to find out how many kids you have and what job your husband has... they use that to gauge how often you're going to need time off for things like school run, immunisation days, etc. P12.*

This detailed probing into personal circumstances reveals how organisations attempt to predict women's future leave needs based on family structures. The inquiry about spousal employment is particularly telling, suggesting that women with husbands in demanding careers might require more leave to handle family responsibilities. These assumptions operate as unspoken hiring criteria, creating barriers that male candidates do not face.

Importantly, the research found these practices were not limited to small organisations with limited HR sophistication. A participant from a large corporate environment noted:

*Some employers still view hiring women, especially married ones, as a burden, assuming they'll take time off for sick husbands, children, and now an additional day off for themselves. P31.*

The phrase *now an additional day off* directly references how the Mother's Day policy becomes integrated into existing assumptions about women's reliability, creating a compounding effect where each gender-specific policy increases perceived hiring risk. The characterisation of women *as a burden* reveals the negative framing of gender-specific accommodations, not as legitimate support but as excessive demands.

These biased hiring considerations created significant consequences for women seeking employment, particularly in sectors like finance and insurance where client relationships and operational continuity are highly valued. Another participant described the psychological impact of these accumulated judgements:

*Every time you are taking time off, whether it's a nursing break or you have to take your child for under five or it's maternity leave or it's Mother's Day, you sort of feel judged because the men don't go on as many breaks. So you're almost seen as a bit of a liability. P3.*

The term *liability* powerfully captures how women experienced themselves being viewed not as valued employees with temporary health needs, but as ongoing risks to organisational functioning. This framing created pressure to minimise leave use of any kind, not just Mother's Day, to maintain professional credibility.

#### **4.4.3 Operational Impact and Workload Management**

Organisations developed various strategies to mitigate perceived operational challenges associated with menstruation leave. These responses ranged from sophisticated workforce planning to structural adaptations that, while pragmatic, sometimes reinforced problematic assumptions about women's reliability.

One manager articulated the multifaceted operational considerations that shaped their approach to absence planning:

*When you're calculating the total impact, it's not just about the days off, it's about team coordination, client relationships, and project continuity. P7.*

This statement reveals how absence management extends beyond simple headcount to include relationship and continuity considerations. In client-facing financial roles, where personal relationships heavily influence business outcomes, these concerns take on particular significance. The comment suggests that even single-day absences create ripple effects that managers must actively manage.

Perhaps most surprisingly, the research uncovered structural adaptations where organisations created specific roles to accommodate potential absences by female employees:

*In certain roles that I've held, there was always a male counterpart that was employed almost like, how can I explain? Almost like a double. They're not necessarily your assistant, but they are there to almost cover for you in case something happens with your child or whatever. P10.*

The participant's difficulty articulating this role *almost like... a double*, highlights its ambiguous nature. Neither officially a backup nor an assistant, this arrangement institutionalises assumptions about women's reliability through organisational structure. The specific mention that these *doubles* were male further reinforces gender stereotypes, positioning men as the reliable constants against women's presumed unpredictability.

The phrase *in case something happens with your child or whatever* reveals how menstruation leave gets conflated with childcare and other responsibilities, contributing to a general perception of women as having divided attention regardless of their actual family status or circumstances.

While potentially ensuring operational continuity, these structural adaptations came with significant downsides for women's professional standing. By institutionalising the expectation

of female absence, these arrangements potentially justified limiting women's responsibilities, client relationships, or advancement opportunities—creating a self-fulfilling prophecy where women were given fewer opportunities because they were assumed to be less consistently available.

#### **4.4.4 Gender Diversity and Workforce Participation**

The research found that while organisations frequently discussed menstruation leave in broader conversations about gender diversity and inclusion, the policy sometimes functioned counter to these stated goals. Rather than supporting female workforce participation, the policy sometimes became a barrier to recruitment and advancement.

One participant directly discussed this contradictory impact:

*It affects hiring decisions. Some managers think twice about hiring women because of all these policies. P6.*

This statement reveals how policies designed to accommodate women's health needs can paradoxically reduce their employment opportunities when implemented in unchanged organisational cultures. The phrase *all these policies* again highlights the compounding effect, where menstruation leave becomes part of a cluster of gender-specific accommodations collectively perceived as burdensome.

Perhaps most revealing was the finding that women are often expected to demonstrate their professional commitment by avoiding policy use, particularly during critical career periods:

*When they are under probation, most employers expect women to forfeit their Mother's Day and not take it to show seriousness or commitment. P12.*

This statement from an HR professional offers a striking insight into unspoken workplace expectations. The explicit connection between avoiding policy use and demonstrating *seriousness or commitment* reveals how organisational cultures can effectively nullify formal entitlements through informal expectations. By creating a situation where policy use signals

reduced commitment, organisations force women to choose between health needs and career advancement.

This expectation was particularly pronounced during probationary periods, precisely when employees typically feel most vulnerable and least able to assert their rights. The implication that new female employees must *prove themselves* by forgoing legitimate health accommodations reveals how deeply gendered expectations are embedded in workplace cultures, potentially undermining the Mother's Day policy's intended benefits.

#### **4.4.5 Implications for Recruitment and Retention**

The findings outlined above reveal several significant implications for women's recruitment and retention in Zambia's financial and insurance sectors.

First, the research identified a clear compounding effect, where Mother's Day leave combined with other gender-specific policies to create cumulative disadvantages in hiring considerations. When viewed in isolation, each policy might create minimal bias, but collectively they significantly influenced how female candidates were assessed.

Second, the findings revealed implicit career advancement barriers, with policy use often interpreted as lack of commitment, particularly for women seeking leadership positions. When professional success requires sacrificing health accommodations, women face additional burdens their male colleagues do not encounter.

Third, organisations' operational adaptations, while pragmatic, often reinforced problematic assumptions about women's reliability. Arrangements like male *doubles* institutionalised the expectation of female absence, potentially justifying limiting women's responsibilities or advancement opportunities.

Fourth, the research uncovered specific pressures during probationary periods, when women felt particularly unable to access entitled benefits without risking negative performance assessments. This created a pattern where women either endured health discomfort to appear committed or used leave and potentially jeopardised career progress.

Finally, the findings highlighted how organisational size created disparate experiences, with smaller organisations typically demonstrating stronger biases against hiring women because of limited resources for managing absences. This size-based disparity suggests that gender equality outcomes may vary significantly across different organisational contexts, even with uniform legal provisions.

Collectively, these findings demonstrate that while the Mother's Day policy aims to support women's workplace participation, its interaction with existing biases, operational concerns, and workplace cultures creates complex and sometimes contradictory outcomes. Responding to these challenges requires comprehensive approaches that target not just formal policy provisions but also the broader organisational cultures and assumptions that shape how policies function in practice.

#### **4.5 The Policy in Practice: A Multi-level Analysis**

This section uses SEM to synthesise the findings across all research questions. SEM allows us to view the Mother's Day policy's impact not just as an organisational issue but as a multi-level interaction between systems and stakeholders, from national legislation down to individual experiences. (Teo, 2015)

The Social Ecological Model provides a framework for understanding how factors at multiple levels; public policy, community, organisational, interpersonal, and individual, interact to shape behaviours and policy outcomes (Teo,2010). Applied to Zambia's Mother's Day policy, this model reveals how implementation and effectiveness are determined by interactions across these levels rather than by any single factor.

#### 4.5.1 Public Policy Level

At the policy level, Zambia's Employment Code Act of 2019 formally entitles women to one day off per month without requiring justification or medical certification. However, the research revealed significant limitations at this level:

1. **Limited Enforcement Mechanisms:** Despite the legal provision, there are few formal mechanisms to ensure employer compliance, leading to inconsistent implementation:

*While the contract will make a provision for Mother's Day, it's very vague. It will just say something like 'The employee is entitled to one day, Mother's Day in a month'. But it won't go into details. P12.*

2. **Absence of Implementation Guidelines:** The law establishes the entitlement but provides no guidance on implementation, creating space for varied interpretations and application:

*Everyone is doing what they think is right. There's no standard. P19.*

3. **Monitoring Gaps:** No systematic monitoring exists to track how organisations implement the policy or remedy non-compliance:

*I have heard of situations where employees have gone to ask their supervisors for Mother's Day leave and they've been told, 'No, you could have picked a better day', or 'You're always asking'. P7.*

These policy level gaps create the conditions for uneven implementation across different organisational contexts.

#### 4.5.2 Community Level

At the community level, cultural norms and social attitudes toward menstruation shape how the policy is perceived and utilised:

1. **Menstruation Taboos:** Deep-rooted cultural taboos about menstruation limit open discussion and normalisation:

*In the village... girls on their period bathe at the end of the stream because it's considered impure. P27.*

2. **Gender Norms and Expectations:** Traditional gender roles influence perceptions of the policy as supporting women's caregiving responsibilities rather than meeting health needs:

*It wasn't directly related to menstruation leave, but also for nursing mothers... It's one of those leaves that don't require reasoning or support. P3.*

3. **Workplace Culture Variations:** Significant differences exist between urban and rural workplace cultures:

*In my environment, at head office where I'm working, it's positive. But in the regional office, I hear people complaining. P13.*

These community level factors create the social context within which organisations and individuals interpret and respond to the policy.

#### 4.5.3 Organisational Level

At the organisational level, structural factors and workplace cultures directly shape policy implementation:

1. **Size-Based Variations:** Organisational size significantly influences implementation approaches, with large organisations creating formal processes, medium-sized firms relying on managerial discretion, and small organisations adopting informal practices.

2. **Leadership Attitudes:** Management perspectives on the policy shape its accessibility and legitimacy:

*If managers don't respect it, then other staff won't respect it. P13.*

3. **Gender Composition:** Departmental gender balance affects policy normalisation and acceptance:

*If you're the only woman in the department, you feel guilty taking the day because then you are seen as the weak one. P3.*

These organisational factors create the immediate context for policy implementation, mediating between national policy provisions and individual employee experiences.

#### **4.5.4 Interpersonal Level**

At the interpersonal level, relationships with supervisors, colleagues, and team members influence women's decisions about policy use:

1. **Supervisor Support:** Managerial attitudes directly affect policy accessibility:

*I know of some supervisors... They'll say, 'Let me lead by example.' P4.*

2. **Peer Dynamics:** Colleagues' reactions and attitudes shape women's comfort in using the policy:

*The females are always difficult. They always complain when you get MD [Mother's Day]. P8.*

3. **Team Pressures:** Concerns about work distribution and team burden influence leave decisions:

*Most of us are female, so you need to plan it in such a way that everyone gets a chance to take their Mother's Day within the month. P30.*

These interpersonal factors create social pressures and support systems that influence individual decision-making around policy use.

#### **4.5.5 Individual Level**

At the individual level, women's personal attitudes, health needs, and career aspirations shape their engagement with the policy:

1. **Career Aspirations:** Women with leadership ambitions often avoid using the policy:

*When you look at the women that are either founders or heading big corporations, you'll find that most of them are inclined towards trying to get rid of that policy.*

**P23.**

2. **Health Needs Assessment:** Women weigh their genuine health needs against potential professional costs:

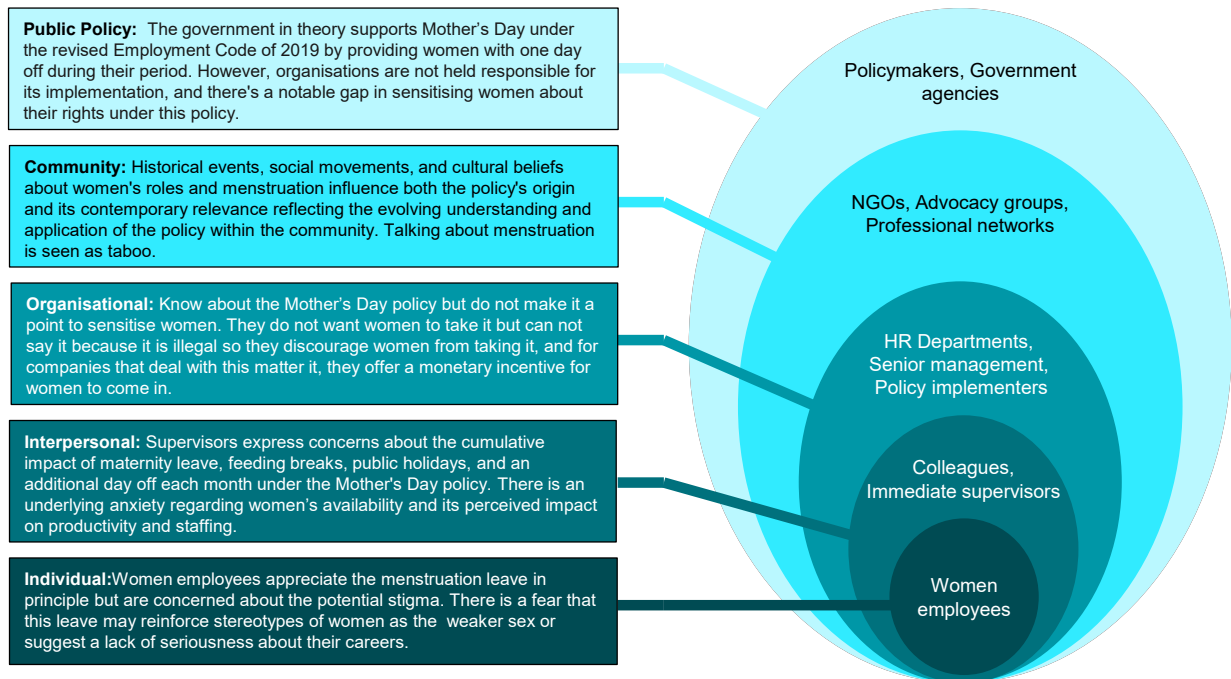
*Usually, I get Mother's Day when I'm about to because it's like a sickness period I go through. P15.*

3. **Strategic Decision-Making:** Women carefully plan when and how to use the policy:

*It's just the awkwardness around mentioning it that really makes it uncomfortable to even take [leave]. P27.*

These individual factors reflect women's agency in navigating the policy within the constraints of their social and organisational contexts.

The analysis reveals important interactions across levels that shape the overall impact of the Mother's Day policy:



**Figure 4.1: Understanding Stakeholder Interactions Through SEM**

Adapted from: Bronfenbrenner (1977).

#### 4.5.6 Implications of the Multi-level Analysis

This social ecological analysis has several important implications for understanding the Mother's Day policy's impact:

1. **Beyond Legal Provision:** The policy's effectiveness depends not just on its legal status but on interactions across multiple social and organisational levels.
2. **Implementation Gaps:** Significant gaps exist between policy intent and implementation, particularly where community norms or organisational cultures resist recognition of menstrual health needs.
3. **Conflicting Pressures:** Women navigate conflicting pressures across different levels, balancing legal entitlements against organisational expectations and social norms.

4. **Intervention Points:** Improving policy effectiveness requires coordinated interventions across multiple levels, from strengthened enforcement mechanisms to cultural change initiatives.
5. **Systemic Perspective:** Individual women's experiences with the policy cannot be understood in isolation but must be viewed as embedded in broader social and organisational systems.

This multi-level analysis demonstrates that the Mother's Day policy's impact on recruitment and retention is shaped by complex interactions across public policy, community norms, organisational structures, interpersonal relationships, and individual decision-making. Removing the gaps and contradictions across these levels is essential for enhancing the policy's effectiveness as a tool for workplace gender equity.

#### 4.6 Implications for Women's Workplace Participation

These findings suggest that while the Mother's Day policy is a progressive step in recognising women's workplace needs, its practical impact is limited by several factors:

1. **Cultural Barriers:** Persistent stigma around menstruation creates discomfort in talking about menstruation in the workplace.
2. **Structural Constraints:** Organisational structures and processes often create barriers to policy access, despite formal entitlements.
3. **Career Advancement Concerns:** Women's strategic avoidance of the policy, particularly at senior levels, suggests tensions between policy use and career progression.
4. **Implementation Inconsistencies:** Variations in implementation approaches create uneven experiences for women across different workplace contexts.

These limitations suggest that legal entitlement alone is insufficient to ensure equitable workplace support. The policy's effectiveness depends on dealing with broader cultural, structural, and systemic factors that shape how it is perceived and implemented.

#### 4.7 Chapter conclusion

The findings presented in this chapter reveal the complex interplay between organisational practices, cultural norms, and gender dynamics in shaping how the Mother's Day policy operates in Zambia's financial and insurance sectors. While the policy aims to support women's workplace participation, its implementation and impact vary significantly across different organisational contexts.

Chapter 5 considers the research questions through key themes that emerged from the research:

1. How organisational size shapes policy implementation
2. The leadership policy paradox
3. Cultural integration patterns
4. Strategic adaptation by women
5. Impact on recruitment and retention dynamics

This analysis demonstrates how these findings extend current theoretical understanding while providing practical insights for policy implementation and workplace equity.

## CHAPTER 5: DISCUSSION

### 5.1 Introduction

This study explored how Zambia's menstruation leave policy, Mother's Day, affects the recruitment and retention of women in the financial and insurance sectors, critically analysing the policy through the lens of inclusive innovation. The primary research question guiding this analysis was:

**How does the menstruation leave policy (Mother's Day) influence the recruitment and retention of women in Zambia's financial and insurance sectors?**

Through qualitative interviews and document analysis, this research investigated policy implementation practices, women's lived experiences, employer perceptions, and broader organisational implications. The findings revealed that while the policy is designed to support women's health and workforce participation, its effectiveness is heavily mediated by organisational contexts, cultural attitudes, and gender dynamics, sometimes generating unintended consequences.

This chapter discusses these insights in detail, structured according to core themes identified from both empirical findings and theoretical insights.

#### ***5.1.1 Implementation Realities and Organisational Responses***

Findings demonstrated significant variation in how the menstruation leave policy is implemented across different organisations in Zambia's financial and insurance sectors. While large organisations have established formalised mechanisms and documented procedures, smaller companies often adopt adhoc or informal approaches. This difference in implementation strategies aligns with Matland's (1995) ambiguity conflict model, highlighting that ambiguity around the policy's goals and lack of clear enforcement mechanisms create discrepancies in how effectively it is applied.

In larger organisations, menstruation leave typically involves structured documentation processes, often requiring prior notice despite policy provisions explicitly not mandating such notice. Employees reported feeling pressured to justify leave requests, therefore undermining policy intent and reflecting organisational cultures prioritising productivity over employee health. This rigid approach aligns with Acker's (1990) feminist organisational theory, illustrating how formal procedures can inadvertently perpetuate gendered inequalities by creating barriers for women seeking to utilise their entitlements comfortably.

Interestingly, organisational responses also varied significantly depending on leadership composition and gender awareness among senior managers. Organisations led by female executives or those actively engaging in gender equity training exhibited more supportive attitudes towards the policy's intent, resulting in more inclusive workplace cultures. These environments actively counter stigma by framing menstruation leave as part of broader wellness initiatives rather than as gender-specific privileges, reducing the career-related anxieties women face when considering policy utilisation.

Despite these positive examples, concerns about misuse persist. Employers frequently raised worries that menstruation leave might be used arbitrarily, reflecting deeper underlying anxieties about managing productivity in competitive sectors. These concerns often translated into informal workplace norms discouraging leave use, particularly in environments dominated by male leadership or where productivity metrics heavily influence organisational reputation and employee evaluations.

Consequently, a key finding is that effective implementation requires more than formal policy enactment, it necessitates organisational cultures explicitly committed to inclusivity and transparency. Organisations demonstrating clear managerial support, open communication about the Mother's Day leave policy, and consistent policy enforcement reported better usage of the leave.

### ***5.1.2 Experiences and Profiles of Policy Users***

The analysis provided important insights into the profiles of women who actively use Zambia's Mother's Day menstruation leave policy, highlighting how intersectional factors, such as age, seniority, organisational role, and perceptions of professional vulnerability, influence policy utilisation. Women's decisions about when and how to take the leave were found to be deeply strategic, shaped by cultural expectations, professional pressures, and personal health needs.

A key finding was the distinction between younger women in early career stages and older women holding senior or leadership positions. Younger employees were more likely to openly utilise menstruation leave for its intended health-related purposes, viewing it as an entitlement aligned with modern workplace practices. For these employees, the policy represents a valuable organisational benefit, one that improves their workplace experience and helps manage menstrual health openly. This aligns with Schneider's (1987) ASA model, suggesting these supportive policies make organisations attractive to younger employees, potentially enhancing recruitment and retention among this demographic.

In contrast, senior-level women exhibited significant reluctance towards utilising menstruation leave, expressing fears about potential negative impacts on their professional credibility and leadership image. This tension embodies the leadership policy paradox, where policies meant to promote equity are paradoxically underutilised by those at higher professional levels, precisely owing to concerns about maintaining authority and credibility in male-dominated professional settings (Putnam & Bochantin, 2009). Senior women reported either abstaining entirely from using the leave or, in some cases, taking the leave without formally recording it to avoid scrutiny or potential stigma. This informal utilisation underscores a critical flaw in implementation. Formal entitlements are perceived as career risks rather than supportive provisions.

Furthermore, women working in highly client-facing roles or performance-driven departments within the sector, such as insurance sales or financial consultancy, also showed significant hesitation. Employees in these roles noted that using menstruation leave might be

interpreted by managers or colleagues as signs of reduced commitment or productivity, influencing their professional reputation and opportunities for advancement. This suggests the policy unintentionally reinforces traditional workplace gender dynamics, echoing Acker's (1990) feminist organisational theory, which highlights how seemingly neutral organisational policies can inadvertently maintain gender inequalities.

Another important nuance emerged from analysing personal factors influencing menstruation leave decisions. Women experiencing severe menstrual health conditions, such as dysmenorrhoea or endometriosis, viewed the policy as critically beneficial. However, even these women often limited the frequency of use due to perceived stigma, particularly in competitive, male dominated environments. This phenomenon aligns closely with feminist standpoint theory (Harding, 2004), emphasising that personal lived experiences significantly shape how individuals navigate organisational policies. It also underscores the need for workplaces to foster environments that allow women to attend to genuine health needs without career repercussions.

Women's strategic navigation of menstruation leave often involved careful timing. For example, some strategically used leave to minimise visibility, taking leave midweek or avoiding consecutive absences to prevent managerial or peer scrutiny. The research uncovered that there are unwritten rules about taking Mother's Day on Friday or Monday or immediately after a public holiday. This practice highlights how stigma drives self-policing behaviours, causing women to prioritise workplace reputation over personal health. Such behaviours contribute to invisible barriers that can cumulatively disadvantage women in the workplace, subtly influencing long-term retention and progression.

These complex experiences suggest that menstruation leave, despite its supportive intent, is perceived differently by distinct user groups. Younger or junior employees, employees in more supportive organisations, and those with visible female leadership reported more positive experiences. Conversely, senior women and employees in less supportive organisational cultures encountered greater tensions, ultimately constraining their ability to comfortably utilise policy entitlements.

Therefore, a key insight from these user profiles is the need for organisational shifts towards cultures that actively normalise menstruation leave, promoting its acceptance as a health-focused benefit rather than a gender-specific privilege. Human Resources-led awareness, senior-level role modelling, and internal communication initiatives emerged as essential strategies to mitigate stigma, enhance policy utilisation, and ensure menstruation leave genuinely supports women's health without inadvertently hindering career progression.

## 5.2 Employer Perceptions and Hiring Practices

The findings provided critical insights into employer attitudes towards Zambia's menstruation leave policy, highlighting significant variability in implementation approaches, perceptions of organisational impact, and the broader influence on hiring decisions in the financial and insurance sectors.

Employers generally recognised the policy's progressive intent and value for women's health and their role in Zambian society as primary caregivers, echoing sentiments that Mother's Day leave could enhance employee wellbeing and potentially improve overall morale. However, underlying these positive acknowledgements were persistent concerns related to organisational productivity, fairness, and cost implications, consistent with transaction cost theory (Williamson, 1981). Employers frequently cited perceived operational disruptions arising from unpredictable absenteeism, especially in smaller organisations or departments where staffing flexibility is limited. This perception suggests that despite being supportive in theory, many employers view menstruation leave as a potential burden, implicitly associating female employees with higher operational costs or logistical challenges.

These employer concerns translated directly into apprehensions around hiring decisions. Although few employers explicitly admitted to discriminatory hiring practices, several HR professionals candidly noted that menstruation leave considerations subtly influenced recruitment processes. Employers were particularly cautious when filling roles perceived as critical or where continuity and reliability were paramount. This aligns with feminist organisational theory (Acker, 1990), highlighting how organisational practices, even

unintentionally, reinforce existing gender disparities by associating women with increased employment risks.

Employers also expressed frustration with policy misuse or inconsistent utilisation, perceiving menstruation leave as sometimes being taken for convenience rather than genuine needs. Such employer perceptions, whether grounded in reality or stereotype, amplified organisational resistance and scepticism towards the policy. This indicates a significant implementation gap. Organisations lacked clear guidance on managing leave fairly and transparently, creating an environment of suspicion and mistrust that can exacerbate gender biases in hiring and promotion.

Overall, the critical employer concerns uncovered by this study highlight a fundamental tension: while employers outwardly support menstruation leave as progressive, internal apprehensions about productivity, fairness, and operational costs remain pervasive. To resolve these tensions, clear and consistent implementation guidelines, organisational transparency, and HR-led awareness and training emerged as crucial strategies. Responding to these concerns through integrated policy frameworks and educational efforts could significantly reduce employer resistance, ultimately improving hiring fairness and reducing gender-based discrimination associated with Mother's Day leave.

### ***5.2.1 Career Progression and the Leadership Policy Paradox***

A central theme emerging from this study is the persistent leadership policy paradox, where menstruation leave, a policy designed to support women's workplace experiences, ironically becomes a barrier to career advancement, particularly for senior and aspiring female leaders. This paradox reveals a critical gap between policy intent and organisational realities, significantly influencing women's retention and advancement prospects in Zambia's financial and insurance sectors.

Senior-level women consistently described a complex relationship with menstruation leave, balancing genuine health needs against entrenched organisational norms that equate leadership effectiveness with consistent presence at work and perceived resilience. Women

in leadership positions or on leadership tracks reported deliberately avoiding applying for formal menstruation leave because of concerns about professional credibility, visibility, and authority. This behaviour aligns strongly with feminist organisational theory (Acker, 1990), highlighting how organisational norms subtly but powerfully reinforce gendered expectations of leadership performance, which disproportionately disadvantage women who openly utilise health-related leave.

Moreover, even among organisations that promoted menstruation leave, senior women perceived implicit expectations to demonstrate resilience or endurance, further deterring formal policy use. Women noted fears of negative performance assessments, reduced promotional opportunities, or peer perceptions of weakness, all reinforcing the stigma associated with openly dealing with the issue of menstrual health. Such experiences illustrate how ostensibly progressive policies can paradoxically create additional pressures for senior women, requiring them to navigate organisational expectations strategically at personal cost.

Interestingly, this study also highlighted the role of organisational culture and female representation at senior levels in mediating the leadership policy paradox. Organisations with higher proportions of senior female leaders demonstrated lower stigma around menstruation leave, enabling women to use policy entitlements more openly without career repercussions. This positive relationship suggests that female representation at senior levels not only enhances policy utilisation but also actively reshapes organisational norms and expectations regarding leadership and resilience. It underscores the importance of female visibility in leadership roles as a critical factor in mitigating policy paradoxes and promoting genuine gender equity.

In addition, younger or mid-level professional women expressed uncertainty and caution regarding how menstruation leave might affect their leadership aspirations. Many reported carefully monitoring how senior female leaders navigated the policy, adjusting their own behaviour accordingly. This highlights how senior leaders' behaviour creates informal norms that directly shape the experiences and strategies of junior women. Therefore, the cautious or concealed use of menstruation leave by senior women can inadvertently perpetuate

organisational stigma, indirectly influencing the behaviour of less senior women aspiring to leadership positions.

Ultimately, confronting the leadership policy paradox requires multi-level organisational interventions. Transparent leadership endorsement and open discussions about menstruation leave by both senior female and male leaders are essential to normalise the policy. Moreover, organisations must actively challenge the implicit association between effective leadership and continuous workplace presence, promoting more inclusive leadership definitions. Such interventions require sustained cultural change initiatives, comprehensive leadership training, and clear communication from senior management, supported by HR frameworks that position menstruation leave within broader health and equity strategies.

By directly confronting these entrenched leadership norms and enhancing senior-level advocacy, organisations can significantly reduce the career-related anxieties associated with menstruation leave, allowing the policy to fulfil its inclusive intentions effectively.

### ***5.2.2 Organisational Culture and Policy Implementation***

The findings clearly revealed that organisational culture significantly shapes how Zambia's menstruation leave policy is perceived, implemented, and ultimately experienced by women in the workplace. This aligns with the CIM developed for this research, illustrating that successful policy implementation depends on more than formal adoption; it relies heavily on workplace norms, leadership attitudes, and HR practices.

The study identified distinct differences in policy implementation linked to organisational size, formality, and existing gender equity frameworks. Larger, multinational companies with structured HR departments and clearly defined diversity and inclusion policies demonstrated more consistent and transparent menstruation leave implementation. These organisations typically positioned menstruation leave as part of broader employee wellness programmes, significantly reducing associated stigma and normalising policy use. By contrast, smaller or less formal organisations often lacked clear policy guidelines, resulting in inconsistent implementation, ambiguity around usage criteria, and heightened suspicion of policy misuse.

This lack of clarity created environments where women either avoided leave entirely or utilised it covertly, reducing the policy's intended benefit.

In addition, managerial attitudes emerged as critical determinants of policy effectiveness. Managers who openly supported menstruation leave, communicating clear expectations and emphasising its importance within broader wellness strategies, created environments where employees felt safe and justified in utilising their leave entitlements. Conversely, managers who were dismissive or indifferent, viewing menstruation leave primarily as a disruption, inadvertently contributed to organisational stigma and discouraged policy use, even in organisations with formal policies in place. This managerial variability highlights the critical role of leadership at all levels in translating formal policies into supportive workplace practices.

Organisational culture also influenced how openly menstruation leave was discussed among employees. Organisations fostering a culture of open dialogue and normalising conversations about menstrual health saw higher policy uptake and lower reported stigma. Employees in these organisations felt more empowered to discuss menstrual health needs openly without fear of judgement or career penalties. Conversely, workplaces characterised by rigid or traditional norms, maintained cultures of silence, reinforcing stigma and pressuring women to minimise or conceal their use of leave. This silence was particularly evident in organisations dominated by male leadership or with limited female representation in management, reinforcing how gender dynamics directly shape policy experiences.

Moreover, this research highlighted the importance of integration between menstruation leave policies and other organisational practices, such as flexible working arrangements, maternity leave, and general sick leave policies. Organisations that embedded menstruation leave within broader HR frameworks, clearly aligning it with other health accommodations, successfully mitigated negative perceptions and reduced the potential for gender-based resentment. This integrative approach reinforced the policy as a standard workplace entitlement rather than a special privilege, aligning strongly with principles of inclusive innovation (George et al., 2012).

Interestingly, employee education and awareness emerged as critical yet often overlooked components of policy effectiveness. Many organisations lacked formal education initiatives to explain menstruation leave entitlements, resulting in widespread confusion and misinformation about policy parameters. Where HR departments actively educated employees, through workshops, policy briefs, or onboarding materials, both employees and managers demonstrated greater policy acceptance and more confident utilisation. Education effectively reduced stigma by framing menstruation leave as a standard health accommodation rather than an unusual or controversial benefit.

Ultimately, the research clearly demonstrates that organisational culture is not just context but a central factor in the success or failure of menstruation leave policies. For the policy to achieve its intended benefits, organisations must adopt comprehensive implementation strategies that prioritise clear communication, managerial training, integrated HR frameworks, and proactive employee education. Such approaches can fundamentally shift organisational culture, enabling menstruation leave to genuinely support workplace inclusion and gender equity rather than inadvertently reinforcing existing barriers.

### ***5.2.3 Cultural Attitudes and Stigma***

This study confirms that cultural attitudes towards menstruation profoundly affect the implementation and uptake of Zambia's menstruation leave policy. Consistent with the findings of Sommer et al. (2022) on menstrual taboos across African contexts, stigma emerged as a major barrier preventing women from comfortably and consistently utilising the leave, despite its formal availability.

One of the most significant findings was the impact of the policy's framing as Mother's Day. The study uncovered that this name, although culturally accepted, inherently reinforced traditional gender roles by associating menstruation explicitly with motherhood. This framing inadvertently excluded women who menstruate but are not mothers, reinforcing a narrow view of women's roles and responsibilities. This aligns with Bobel et al. (2020), who highlight how policy language shapes societal attitudes, influencing how effectively such policies can

achieve their intended inclusive outcomes. Therefore, the choice of name emerged not as a trivial issue but as a fundamental determinant of policy perception and acceptance.

Moreover, the cultural stigma surrounding menstruation significantly shaped how openly women engaged with the policy at work. Participants across various organisations expressed hesitancy about openly utilising menstruation leave, fearing perceptions of weakness or compromised professionalism. This hesitancy was particularly pronounced among women in leadership roles or aspiring to senior positions, highlighting the leadership policy paradox identified earlier in the research. Women in these positions felt pressure to downplay or completely avoid taking menstruation leave to maintain professional credibility, illustrating how stigma can reinforce self-limiting behaviours and subtly disadvantage women's career progression.

The influence of stigma extended beyond individual experiences to affect team dynamics and workplace relationships. Findings indicated that menstruation leave was often viewed by male colleagues, and even some female colleagues, as an unfair or unnecessary privilege. This perception exacerbated workplace tensions, particularly in male-dominated teams or industries, echoing Levitt and Barnack-Tavlaris's (2020) insights into workplace resentment. The resentment stemmed from limited understanding and deeply embedded cultural norms about gendered health accommodations, underscoring the urgent need for organisational interventions that challenge prevailing cultural stereotypes.

Another critical finding was the variation in policy uptake across generational lines. Younger women were generally more open and assertive about utilising menstruation leave, often framing it as a fundamental health right rather than a gender-based privilege. This contrasted sharply with older generations, who frequently associated menstruation with privacy or embarrassment and thus hesitated to openly use the leave. This generational difference highlights an evolving cultural landscape, suggesting opportunities for organisational interventions tailored to different demographic groups to improve policy acceptance and effectiveness.

Furthermore, the findings showed that stigma was strongly influenced by organisational efforts, or lack thereof, to normalise menstruation discussions in professional settings. Organisations that proactively dealt with menstruation needs and effects on employees through employee training, workshops, or health campaigns reported significantly lower levels of stigma, creating environments where menstruation leave was more readily accepted and used. Conversely, organisations that avoided such discussions inadvertently perpetuated stigma, reinforcing silence and discomfort around menstruation, consistent with Johnston-Robledo and Chrisler's (2020) observations about workplace silence reinforcing gendered inequalities.

To effectively mitigate stigma, organisations must therefore move beyond mere policy implementation towards actively reshaping cultural attitudes. The research indicates that comprehensive educational initiatives, led and supported by management, significantly reduce stigma. These initiatives must clearly communicate menstruation leave as a legitimate and standard health accommodation, distinct from special privileges or gender-specific favours. In so doing, organisations not only enhance women's ability to manage menstrual health comfortably but also actively challenge deeper cultural attitudes that maintain gender inequalities.

Finally, reducing stigma requires collaborative efforts across multiple levels of SEM, individual, interpersonal, organisational, community, and policy (Bronfenbrenner, 1979). While organisations play a central role, broader societal shifts are necessary to sustain changes in workplace cultures. Public policy advocacy, media engagement, community, level educational initiatives, and inclusive public health messaging are critical for driving broader cultural acceptance of menstruation and reducing workplace stigma.

In summary, this research highlights that successfully confronting menstrual stigma in the workplace is not solely about effective policy design or implementation, it requires fundamental shifts in organisational and societal attitudes. Only by tackling deeply ingrained cultural taboos and promoting openness around menstrual health can Zambia's menstruation leave policy genuinely support workplace inclusion and gender equity.

### 5.3 Employer Perceptions and Economic Implications

This study highlighted the critical role employer perceptions play in shaping the implementation, effectiveness, and outcomes of Zambia's menstruation leave policy. One of the clearest insights emerging from the research was the duality in employer attitudes towards menstruation leave. On the one hand, many employers recognised menstruation leave as a progressive policy, reflecting organisational commitments to gender equality, employee well-being, and inclusive innovation. These employers acknowledged the value of accommodating women's health needs, emphasising benefits such as increased employee satisfaction, improved retention, and strengthened organisational branding. Organisations that successfully integrated menstruation leave into broader employee wellness frameworks tended to view the policy positively, interpreting the costs associated with leave uptake as justified investments in employee welfare and productivity, consistent with the inclusive innovation framework.

On the other hand, however, numerous employers, especially within highly competitive financial and insurance sectors, viewed menstruation leave primarily as an economic burden. The economic perspective dominated particularly among smaller or mid-sized companies, where resource constraints heightened sensitivity to perceived productivity losses and operational disruptions. These employers expressed concern about the cumulative impact of 12 additional leave days annually per female employee, citing potential difficulties in workload management, meeting client expectations, and maintaining competitive performance standards. Such concerns directly echo transaction cost theory (Williamson, 1981), suggesting employers often approach menstruation leave through cost, benefit analyses, sometimes to the detriment of inclusive practices.

These economic concerns manifested directly in hiring practices and decision-making processes. Findings indicated that some employers subtly, yet significantly, integrated menstruation leave into their recruitment considerations. Participants reported instances where organisations informally avoided hiring women, especially younger women, explicitly owing to perceptions of increased absenteeism and operational unpredictability. This hidden

bias, although rarely openly acknowledged, presented serious unintended consequences of menstruation leave policies, reinforcing gendered inequalities within employment opportunities.

The study also highlighted important sector-specific variations. Larger financial institutions generally demonstrated greater structural capacity to absorb leave related costs, primarily through formalised HR policies and resource allocation. By contrast, smaller or less structured organisations often struggled, facing heightened economic pressures that reinforced resistance to the policy. The complexity of organisational size thus emerged as a crucial determinant of policy outcomes, suggesting the need for tailored implementation strategies across different organisational contexts.

Another notable insight involved employers' concerns about potential policy misuse. Many expressed frustrations with what they perceived as inadequate regulation or tracking of menstruation leave usage, fuelling concerns about fairness and accountability within their teams. These perceptions occasionally translated into stricter informal controls, such as requiring women to notify supervisors in advance or provide additional justification, despite the policy's explicit provision that no such notice or medical certification is required. Such employer driven adaptations inadvertently introduced barriers to policy access, undermining the original intent of inclusive support.

To overcome these concerns effectively, the findings emphasise the need for clearer policy guidelines and stronger employer engagement. Employers who had clear communication strategies and transparent guidelines on menstruation leave usage reported significantly lower tensions and better employee management relations. Furthermore, training supervisors and management staff about understanding the rationale and practical implementation of the policy emerged as essential. Such training programmes not only improved organisational acceptance but also fostered more balanced employer perceptions, reducing misconceptions around productivity loss and encouraging more equitable hiring practices.



This study adds to existing scholarship by highlighting how well-intentioned gender policies can be undermined by implementation gaps, organisational culture, and persistent gender norms. While the theoretical frameworks outlined in Chapter 2 provided a foundation for understanding menstruation leave in the Zambian context, this research surfaces specific tensions and dynamics that extend and nuance these models (see Chapter 2 for full theoretical background).

Feminist Organisational Theory (Acker, 1990; Ely & Meyerson, 2000) helped reveal how menstruation leave policies, though designed to address gendered experiences are embedded in workplaces that often reward the invisibility of those same experiences. The data show that formal entitlements exist alongside informal pressures to avoid using them, especially for women in leadership or those aspiring to move up. This reinforces the idea that gender-neutral ideals continue to define the "ideal worker," but it also adds a layer: even progressive policies may be silently penalised through unspoken norms. This disconnect, described by several participants, supports the concept of **implementation fissures**—the subtle but significant divergence between policy and practice in organisational life.

The Complex Interplay Model and Social Ecological Model (see Chapter 2) were useful in situating these tensions across levels. However, the findings suggest that organisational-level factors, such as how HR departments frame and enforce the policy, often override the intended equity goals at the national level. Despite policy clarity under the Employment Code Act, employees consistently experienced uncertainty, discretionary enforcement, and reputational risk. This highlights the importance of middle-management and peer dynamics echoing findings from health systems research, but also calls for further theorisation of how **organisational agency** can reshape formal entitlements in subtle but significant ways.

In line with Postcolonial Feminist Theory, the study reveals how cultural norms and colonial legacies shape perceptions of professionalism, hygiene, and female productivity. Many participants referenced the idea that a "professional woman" should not show signs of weakness, revealing internalised ideals rooted in Eurocentric and masculinised work norms.

While these dynamics have been discussed broadly in feminist literature, this study contributes an empirical view of how such values interact with menstruation-specific policy in a Southern African context. This is especially relevant as more countries including Spain in 2023 introduce menstrual leave laws, prompting global comparisons around stigma, visibility, and uptake (Kassam (2024,).

Finally, the data reveal a tension I refer to as the leadership-policy paradox: women in or aspiring to leadership roles often avoid using the leave for fear of appearing less committed or capable. This suggests that policy alone is insufficient to address representation gaps. Instead, menstrual leave must be integrated within broader frameworks that challenge deep-seated expectations of linear, uninterrupted productivity. This finding invites a rethinking of how gender-specific entitlements interact with career advancement. An area still under-theorised in feminist organisational studies.

In sum, this study affirms the value of multi-level and intersectional frameworks but also points to the need for greater attention to how policies are lived and negotiated within organisations. The findings offer two key conceptual contributions namely; implementation fissures and the leadership-policy paradox, that may support more context-sensitive approaches to gender equity in policy design and evaluation.

### ***Practical Recommendations: Implementing Effective Menstruation Policies***

Based on this study's findings, several practical recommendations emerge for policymakers, organisations, and advocates seeking to implement effective menstruation-related workplace policies. These recommendations acknowledge the complex interplay between organisational structures, cultural attitudes, and gender dynamics identified throughout the research.

#### **5.3.1.1 Policy Clarification and Renaming**

Given the findings related to stigma, confusion, and cultural misinterpretations arising from the policy's current name (Mother's Day), it is recommended that the Zambian government

and policymakers adopt clearer, more inclusive terminology such as Menstrual Health Day or Wellness leave.

***Implementation Steps by Organisational Size:***

For Large Organisations (250+ employees):

1. Form a cross-departmental committee including HR, legal, and employee representatives to review current policy language and implementation.
2. Conduct an anonymous survey to assess employee understanding and comfort with current policy framing.
3. Draft revised policy language with explicit health focus rather than reproductive framing.
4. Implement comprehensive communication plan including leadership announcements, internal communications, and updated handbooks.
5. Establish monitoring mechanisms to track policy utilisation and employee feedback.

For Medium Organisations (50-249 employees):

1. Engage HR and department heads in policy review workshops to identify current communication issues.
2. Gather employee input through focus groups or team-level discussions.
3. Revise policy language to clarify health focus and reduce stigmatising terminology.
4. Update all employee documentation and conduct department-level briefings on revised framing.
5. Establish quarterly check-ins to assess implementation effectiveness.

For Small Organisations (<50 employees):

1. Conduct all-staff meeting to discuss current policy understanding and challenges.
2. Work with external HR consultant to develop appropriate policy language if in-house expertise is limited.
3. Create simple, clear policy document emphasising health and wellness aspects.

4. Hold team discussions led by senior management to normalise the policy and its purpose.
5. Establish open feedback channels for ongoing policy refinement.

### ***Potential Challenges and Solutions:***

#### Renaming and Reframing Policies

Efforts to rename or reframe menstruation leave policies, such as shifting away from “Mother’s Day Leave”—can encounter resistance, confusion, or uneven implementation. While such changes aim to better reflect the policy’s intent and promote inclusivity, they must be introduced thoughtfully to preserve cultural resonance and encourage uptake. This section outlines common barriers and presents context-sensitive strategies, supported by a documented case example from Australia’s Victorian Government.

*Cultural Resistance Challenge:* Some stakeholders may resist changing the title of policies like “Mother’s Day Leave” due to its long-standing familiarity or symbolic value, especially in cultural contexts where the role of “mother” is deeply respected.

*Solution:* Reframe the change as an expansion, not a rejection, of the original purpose—clarifying that the leave supports a wider range of reproductive health needs for all menstruating individuals, not only mothers. To increase cultural alignment, organisations can engage community elders, women’s groups, or HR representatives in shaping the new language, ensuring that it remains respectful while being more inclusive.

*Communication Challenge:* Even after policy revision, certain departments or regional offices may continue using outdated terms due to habit or lack of clear direction.

*Solution:* Provide implementation checklists and toolkits for managers in all offices and designate local policy champions to ensure accountability. Spot audits or informal check-ins can also help track uptake. Policies should include clear language on expected use and reporting formats to reinforce consistency.

*Successful Practice Example:* In 2024, the Victorian Government introduced a five-day paid reproductive health and wellbeing leave policy for public sector employees, replacing fragmented entitlements with a single, inclusive provision (Community and Public Sector Union Victoria, 2024). The change required cross-departmental coordination, stakeholder consultation, and internal communications to ensure consistent uptake across the public service.

Departments received policy guides, internal FAQs, and rollout support, and language was intentionally framed around wellbeing to reduce stigma. The term “reproductive health” was selected to reflect a range of needs, including menstruation, menopause, and IVF without singling out specific gender identities. Early feedback highlighted improved clarity around eligibility, reduced need for disclosure, and greater employee comfort accessing the policy (Victorian Government Solicitor’s Office, 2024).

This case demonstrates how thoughtful reframing, paired with strong communication and implementation planning, can lead to widespread policy acceptance even in complex, decentralised public systems.

### **5.3.1.2 Comprehensive Employer Guidelines and Training**

The study highlighted inconsistencies and confusion among employers regarding implementation and regulatory compliance, leading to informal barriers and tensions. Therefore, it is crucial to develop comprehensive and context-sensitive implementation guidelines targeted specifically at employers and HR professionals.

#### ***Implementation Steps by Organisational Size:***

For Large Organisations:

1. Develop detailed policy implementation handbook with standardised procedures, approval processes, and documentation requirements.
2. Implement mandatory training sessions for all managers and HR staff, with specialised modules for different departments.

3. Create digital learning resources accessible through company intranet or learning management systems.
4. Establish formal compliance monitoring through regular HR audits and reporting requirements.
5. Integrate policy knowledge into performance evaluation criteria for managerial staff.

For Medium Organisations:

1. Adapt comprehensive guidelines into streamlined implementation manual focusing on core principles and essential processes.
2. Conduct quarterly training workshops for management teams with practical scenario exercises.
3. Develop simple reference guides for managers to handle common questions and situations.
4. Implement peer learning communities where experienced managers mentor newer leaders.
5. Include policy implementation in regular management meeting agendas to maintain visibility.

For Small Organisations:

1. Create simplified one-page implementation guide with clear step-by-step instructions.
2. Hold facilitated discussion sessions rather than formal training, focusing on practical application.
3. Identify external resources (such as industry association guidelines) to supplement limited internal expertise.
4. Establish direct CEO/owner involvement in communicating policy importance.
5. Utilise external HR consultants for periodic implementation reviews if internal HR capacity is limited.

***Potential Challenges and Solutions:***

*Resource Constraint Challenge:* Smaller organisations may lack HR infrastructure for comprehensive training programmes.

*Solution:* Develop industry-level resources through banking and insurance associations that can be shared across organisations. Create tiered implementation approaches with simpler requirements for smaller organisations.

*Attitudinal Resistance Challenge:* Some managers, particularly older or more traditional leaders, may resist engagement with menstruation-related training.

*Solution:* Frame training in terms of regulatory compliance and organisational effectiveness rather than personal attitudes. Include respected senior leaders as training advocates and use case studies demonstrating business benefits.

*Knowledge Retention Challenge:* One-time training often has limited long-term impact on behaviour change.

*Solution:* Implement refresher trainings, practical application exercises, and just-in-time resources that managers can access when specific situations arise. Create communities of practice where managers can discuss implementation challenges.

*Successful Practice Example:* Safaricom's Manager Enablement Program provides an excellent model for effective training implementation. Their approach combines initial comprehensive training with quarterly refreshers and practical application tools. Particularly effective was their Manager's Toolkit – a digital and physical resource containing scenario-based guidance, conversation starters, and decision-making frameworks for handling menstruation-related workplace situations. This resource empowered managers to respond confidently to employee needs without requiring expertise in menstrual health. Implementation resulted in a 47% increase in managers' self-reported comfort in dealing with menstruation-related workplace situations (Safaricom Sustainable Business Report, 2021).

### 5.3.1.3 Integration into Broader Wellness and Inclusive Innovation Strategies

To enhance uptake and reduce stigma, menstruation leave should not stand alone. Instead, it must be integrated into broader workplace wellness and gender equality initiatives.

#### ***Implementation Steps by Organisational Size:***

For Large Organisations:

1. Conduct comprehensive review of all health-related policies to identify integration opportunities.
2. Develop organisation-wide wellness framework that positions menstruation leave alongside other health supports.
3. Create formal integration with existing diversity and inclusion governance structures.
4. Establish wellness committees with representation across departments and hierarchical levels.
5. Implement integrated digital platforms for accessing all wellness and health resources.
6. Develop comprehensive evaluation frameworks measuring holistic wellness outcomes.

For Medium Organisations:

1. Review current health and wellness offerings to identify logical integration points.
2. Develop simplified wellness framework connecting related policies and supports.
3. Conduct focus groups to understand employee preferences for integrated approaches.
4. Train departmental wellness champions to facilitate local integration.
5. Create unified communication materials presenting connected wellness resources.
6. Implement quarterly wellness initiatives that integrate multiple health considerations.

For Small Organisations:

1. Create unified employee wellbeing policy incorporating multiple health supports.
2. Hold staff meetings to gather input on integrated wellness approaches.
3. Identify no-cost or low-cost wellness resources from external providers.

4. Designate a wellness coordinator to maintain integration across initiatives.
5. Develop simple communications emphasising connections between wellness elements.
6. Create informal feedback mechanisms to assess effectiveness.

***Potential Challenges and Solutions:***

*Integration Complexity Challenge:* Merging separate existing policies may create administrative confusion.

*Solution:* Start with communication integration before policy integration, helping employees see connections between existing supports. Create clear visual maps showing how different policies relate to each other.

*Resource Prioritisation Challenge:* Organisations may struggle to allocate resources across multiple wellness needs.

*Solution:* Utilise employee input to identify highest-priority wellness needs, allowing organisations to phase implementation based on demonstrated impact. Leverage external partnerships to expand resource availability.

*Cultural Resistance Challenge:* Some stakeholders may resist including menstruation within broader wellness frameworks owing to cultural sensitivities.

*Solution:* Utilise culturally appropriate language and framing, positioning menstruation as one of many natural health processes that affect workplace wellbeing. Engage cultural leaders to help frame messaging appropriately.

**5.3.1.4 Introduction of Innovative Funding Structures**

Employer resistance and discriminatory hiring practices identified in the research were often linked to economic concerns about the direct costs associated with menstruation leave. To mitigate this, innovative financing models should be explored.

***Implementation Steps by Organisational Size:***

#### For Large Organisations:

1. Conduct detailed cost-benefit analysis of current menstruation-related absenteeism versus structured policy costs.
2. Develop centralised funding pool specifically allocated to health-related absence coverage.
3. Implement cross-training programmes ensuring operational continuity during absences.
4. Create flexible team structures that can absorb temporary absences without productivity loss.
5. Develop data tracking systems to monitor utilisation patterns and optimise resource allocation.
6. Explore shared-cost structures with health insurance providers recognising preventive benefits.

#### For Medium Organisations:

1. Establish departmental absence management plans with resource-sharing across teams.
2. Create contingency staffing arrangements with clear activation processes.
3. Implement flexible work arrangements that reduce binary present/absent dynamics.
4. Develop simplified cost tracking to identify patterns and optimise resource allocation.
5. Explore industry association pooled resources for implementing health-related policies.
6. Consider partial outsourcing of functions requiring continuous coverage.

#### For Small Organisations:

1. Implement informal work-sharing agreements to cover absences.
2. Develop documentation of essential processes to facilitate coverage by colleagues.
3. Create flexible scheduling options to accommodate health needs while maintaining operations.
4. Explore external funding support through industry associations or government programmes.

5. Consider part-time/flexible staffing models that build in redundancy without full-time costs.
6. Utilise digital tools to maintain productivity during remote work arrangements.

***Potential Challenges and Solutions:***

*Cost Visibility Challenge:* Organisations often focus on the perceived direct costs of implementing menstruation leave or accommodations, such as paid time off or provision of hygiene products. However, they may underestimate the hidden costs of presenteeism, where employees work while unwell and are less productive, or unplanned absenteeism, which can be more disruptive and costly.

*Solution:* Introduce tracking systems that monitor both the direct costs of inclusive policies (e.g. leave days used, product provision) and the indirect benefits, such as improved productivity, retention, and reduced turnover. For instance, in Australia, modelling by the Bankwest Curtin Economics Centre estimated that reproductive health-related presenteeism cost employers AUD 26.5 billion annually, while implementing reproductive leave would cost only AUD 920 million a 30-fold return on investment (Convery, 2025). Publicising such findings through internal reporting and sustainability communications can build business case buy-in.

*Operational Continuity Challenge:* Roles requiring continuous client interaction, such as sales, healthcare, or frontline service, may be difficult to cover during unplanned absences linked to menstruation or other reproductive health issues.

*Solution:* Adopt team-based workload structures and cross-training systems so that client responsibilities are not concentrated on a single individual. Safaricom's hybrid model in Kenya, for example, encourages team members to build shared ownership over client portfolios and maintain open communication on availability (Safaricom, 2021). This reduces disruption during staff absence and ensures continuity of service.

*Industry Variation Challenge:* Funding approaches and accommodation models that work in one industry (e.g., tech or finance) may be impractical in others (e.g., manufacturing, education, agriculture), particularly where resources or staffing models are constrained.

*Solution:* Encourage sector-specific guidelines developed through industry associations or unions. These guidelines can offer tiered implementation strategies, recommending scalable options depending on the size and capacity of organisations. For example, in the Victorian Public Service in Australia, the reproductive health leave initiative was designed with input from multiple departments and unions, ensuring it could be adapted by different agencies based on operational realities (Community and Public Sector Union Victoria, 2024).

*Successful Practice Example:* The Victorian Government's reproductive health leave policy offers a strong example of how menstrual and reproductive health policies can be mainstreamed into public sector HR systems. Rather than decentralising the cost burden, the policy treats reproductive leave as part of standard entitlements across all departments, with consistent guidelines and record-keeping practices (Victorian Government Solicitor's Office, 2024). This approach prevents departmental resistance, reduces gender bias in hiring, and builds a shared culture of support.

In tandem, the government introduced staggered scheduling tools and knowledge management protocols to manage coverage during employee absences. These tools ensured service continuity while removing pressure from individual departments to 'absorb' the impact of leave, creating a more gender-equitable and performance-oriented work environment.

#### **5.3.1.5 Transparent and Regular Policy Evaluation**

The current study highlighted significant gaps in empirical data regarding policy uptake, effectiveness, and career impacts over time. Policymakers should therefore mandate transparent, regular evaluations of menstruation leave policy implementation and outcomes across various sectors.

***Implementation Steps by Organisational Size:***

## For Large Organisations:

1. Develop comprehensive evaluation framework with both quantitative metrics (utilisation rates, retention statistics, promotion patterns) and qualitative measures (employee experience, stigma reduction).
2. Implement digital tracking systems capturing policy utilisation while maintaining privacy.
3. Conduct annual in-depth policy reviews with cross-functional stakeholder involvement.
4. Establish quarterly reporting to executive leadership on key implementation metrics.
5. Create longitudinal analysis tracking career progression patterns related to policy utilisation.
6. Participate in industry benchmarking to compare effectiveness across organisations.

## For Medium Organisations:

1. Develop simplified evaluation framework focusing on essential metrics tailored to organisational priorities.
2. Implement semi-annual policy effectiveness reviews with management team.
3. Conduct annual employee feedback sessions or surveys regarding policy implementation.
4. Create basic tracking systems balancing data collection with privacy concerns.
5. Incorporate policy effectiveness metrics in organisational performance dashboards.
6. Develop case studies documenting policy impact on specific teams or departments.

## For Small Organisations:

1. Create simple evaluation checklist focusing on basic implementation and utilisation.
2. Conduct informal feedback conversations with employees about policy effectiveness.
3. Track basic metrics such as utilisation, absence patterns, and retention.
4. Participate in industry association data sharing to benchmark against similar organisations.

5. Implement annual policy review meeting with all staff to gather improvement suggestions.
6. Document individual success stories and challenges to inform future improvements.

### ***Potential Challenges and Solutions***

*Privacy Challenge:* Collecting data on menstruation-related policy use raises significant privacy concerns.

*Solution:* Develop anonymised tracking systems that measure utilisation without identifying individuals. Focus evaluation on department or team-level patterns rather than individual behaviour. Ensure data collection follows strict privacy protocols.

*Measurement Complexity Challenge:* Isolating the specific impact of menstruation leave from other workplace factors is methodologically challenging.

*Solution:* Implement mixed-methods evaluation combining quantitative metrics with qualitative feedback. Develop contribution analysis approaches that acknowledge multiple causal factors rather than seeking direct attribution. Use comparative analysis between similar teams with different implementation levels.

*Long-term Impact Challenge:* Career effects may take years to manifest, exceeding typical evaluation timeframes.

*Solution:* Implement longitudinal tracking of career progression, establishing baseline data and measuring changes over multiple years. Supplement with retrospective analysis of historical promotion and retention patterns.

### **5.3.1.6 National Awareness and Education Campaigns**

Attending to entrenched cultural taboos and stigma surrounding menstruation requires large-scale national campaigns beyond organisational contexts.

### ***Implementation Steps by Organisational Size:***

For Large Organisations:

1. Partner with government agencies and NGOs on large-scale awareness campaigns.
2. Allocate corporate social responsibility funding to menstrual health education initiatives.
3. Provide communications expertise and platforms for amplifying awareness messages.
4. Engage senior leadership as public advocates for menstrual health normalisation.
5. Implement internal campaigns synchronised with national messaging.
6. Contribute to development of industry-specific educational materials and best practices.
7. Sponsor research advancing understanding of menstruation's workplace impact.

For Medium Organisations:

1. Participate in industry association awareness initiatives.
2. Implement internal education aligned with national campaign messages.
3. Engage with local community organisations on menstrual health awareness.
4. Provide employee volunteers for community education efforts.
5. Share implementation experiences through industry forums and business associations.
6. Host community education events in partnership with health organisations.
7. Support employees serving as menstrual health advocates in professional networks.

For Small Organisations:

1. Display national campaign materials in workplace.
2. Participate in local business network discussions on menstrual health.
3. Engage with community education events as organisational representatives.
4. Share policy implementation experiences with other small businesses.
5. Incorporate national campaign messages in employee communications.
6. Support employee attendance at community awareness events.
7. Implement simple workplace education sessions aligned with national messaging.

***Potential Challenges and Solutions:***

*Cultural Sensitivity Challenge:* Public campaigns on menstruation may face resistance in culturally conservative communities.

*Solution:* Engage religious and community leaders in message development, utilising culturally resonant framing and appropriate language. Develop differentiated messages for different community contexts while maintaining core health focus.

*Coordination Challenge:* Multiple organisations conducting separate campaigns may create fragmented or contradictory messaging.

*Solution:* Establish national coordination mechanism bringing together government agencies, private sector organisations, and civil society to develop consistent core messaging. Create shared resource library of campaign materials and implementation guides.

*Sustainability Challenge:* Short-term campaigns often have limited lasting impact on deeply entrenched attitudes.

*Solution:* Design multi-year campaign strategies with evolving messages and reinforcement mechanisms. Integrate menstrual health education into existing institutional structures such as school curricula, healthcare provider training, and corporate diversity programmes.

**Successful Practice Example:** The Breaking the Silence campaign implemented through the Help Mission Development in Baringo county in Kenya, demonstrates effective national awareness building. This multi-year initiative combined mass media campaigns with targeted interventions in workplaces, schools, and communities. Particularly effective was their Workplace Champions programme, which trained employees from various organisations to serve as internal advocates and educators. The campaign achieved measurable attitude shifts, with public opinion surveys showing a 28% increase in acceptance of menstruation as an appropriate workplace health topic after 18 months (Help Mission Development Services, 2022).

### 5.3.1.7 Encouraging Inclusive Innovation in Smaller Enterprises

This study underscored specific challenges faced by smaller businesses, particularly those without structured HR functions or resources to implement gender-sensitive policies effectively.

#### ***Implementation Steps by Organisational Size:***

For Industry Associations and Government Agencies Supporting Small Businesses:

1. Develop simplified implementation toolkits specifically designed for small organisations.
2. Create peer learning networks connecting small businesses implementing similar policies.
3. Provide subsidised HR consulting services focusing on gender-inclusive policy implementation.
4. Establish recognition programmes highlighting successful small business implementation.
5. Develop phased implementation guidelines allowing gradual adoption based on capacity.
6. Create industry-specific adaptation guides aligned to operational contexts.
7. Establish mentorship programmes pairing experienced implementers with new adopters.

For Small Organisations:

1. Participate in industry association resources and training specifically for small businesses.
2. Engage directly with employees to co-create simplified implementation approaches.
3. Identify low-resource accommodation strategies such as schedule flexibility.
4. Start with minimal viable implementation focusing on essential supports.
5. Document implementation learning to share with other small businesses.
6. Leverage digital resources and tools designed specifically for small organisations.
7. Partner with other small businesses to share implementation resources and costs.

#### ***Potential Challenges and Solutions:***

*Resource Limitation Challenge:* Small businesses often lack dedicated HR personnel or implementation resources.

*Solution:* Create shared resource pools through industry associations or local business networks. Develop turnkey implementation kits requiring minimal customisation. Offer subsidised implementation support through government small business programmes.

*Operational Vulnerability Challenge:* Small organisations may have limited redundancy to cover absences.

*Solution:* Develop flexible work models rather than binary absence options. Create partnership arrangements with similar local businesses for mutual support during staff absences. Implement cross-training ensuring essential functions have backup coverage.

*Informal Structure Challenge:* Many small businesses operate through informal processes rather than documented policies.

*Solution:* Develop implementation approaches that work in informal structures rather than requiring formalisation. Create simple conversation guides for owner-managers rather than formal policy documents. Focus on practical accommodations rather than administrative processes.

#### **5.4 Responding to the Research Questions**

This research sought to understand how Zambia's Mother's Day policy affects women in the financial and insurance sectors through five specific research questions. The findings from this study provide insights into the policy's implementation, utilisation patterns, and impact on women's workplace experiences. The following summarises how the research findings answer each question.

**Research Question 1:** The findings reveal that organisational size significantly determines Mother's Day policy implementation approaches, with large organisations establishing formalised, often bureaucratic procedures that create barriers to access despite official compliance; medium-sized organisations demonstrating inconsistent application dependent on managerial discretion; and small organisations adopting informal, trust-based approaches that reduce administrative barriers but create ambiguity around entitlement. These implementation variations are influenced by workplace cultural integration, communication norms regarding menstruation, and policy vagueness in employment contracts.

**Research Question 2:** The research identifies clear patterns regarding which women utilise the Mother's Day policy, with early career women (20s, early 30s) demonstrating the highest usage rates while openly discussing their needs; mid-career women (mid-30s, 40s) employing more strategic approaches that balance personal requirements with professional considerations; and senior women and those in later career stages (45+) largely avoiding the policy altogether, often viewing it as potentially harmful to their professional image.

**Research Question 3:** Women's perceptions and utilisation of the Mother's Day policy reveal three distinct interpretations: most commonly as support for women's multiple caregiving roles beyond menstruation; secondly as a general wellness or rest day helping to cope with broader physical and mental health needs; and thirdly as specific menstrual health leave. These interpretations inform strategic navigation practices where women carefully time their leave to minimise workplace disruption, develop communication strategies that avoid mentioning menstruation directly to manage stigma, and negotiate cultural taboos while maintaining professional identity.

**Research Question 4:** The findings demonstrate significant personal and professional implications for women who utilise the Mother's Day policy, including career advancement concerns where policy use potentially signals unreliability or weakness to employers; workplace relationship challenges particularly in male-dominated environments where colleagues may view the leave as special treatment; and professional identity negotiations where women must balance health needs against being perceived as fully committed

employees. These implications create additional psychological and career-related burdens, forcing women to engage in strategic planning about when and how to access their entitled leave.

**Research Question 5:** Employer perceptions of the Mother's Day policy are primarily shaped by resource management concerns, with many viewing it as part of a broader set of gender-specific entitlements that potentially increase absenteeism among female employees. These perceptions influence hiring practices, particularly in smaller organisations that may prefer male employees above female employees to avoid managing leave related absences. In addition, employers describe operational challenges in maintaining workflow continuity, sometimes implementing informal coverage systems that include assigning male *shadow* colleagues to female employees, inadvertently reinforcing perceptions of women as less reliable workers.

**Main Research Question:** The menstruation leave policy's impact on recruitment and retention of women in Zambia's financial and insurance sectors operates through a complex interplay across multiple levels. While not directly preventing women's employment, the policy interacts with other gender specific entitlements to create a cumulative effect that influences hiring decisions, with some organisations demonstrating preferences for male candidates perceived as more consistently available. Furthermore, implementation approaches significantly affect women's job satisfaction and sense of support, with inconsistent application or negative managerial attitudes discouraging policy use and potentially driving staff turnover. Career advancement is affected as women strategically avoid using the policy to maintain professional credibility, creating a self-reinforcing culture that limits its effectiveness as a supportive measure.

## 5.5 Chapter Conclusion

In conclusion, Zambia's menstruation leave policy has significant potential as an inclusive innovation for gender equity, but its success depends on thoughtful implementation, cultural shifts, innovative funding mechanisms, and comprehensive organisational support. This study

provides foundational evidence guiding these recommendations and future directions, advancing the broader mission of creating equitable workplaces where women's health needs are acknowledged, respected, and seamlessly integrated into organisational life.

## CHAPTER 6: CONCLUSION

### 6.1 Introduction

This study set out to explore a central question: How does Zambia's menstruation leave policy commonly known as Mother's Day influence the recruitment and retention of women in the financial and insurance sectors? This final chapter brings the study to a close by summarising the key findings, revisiting the theoretical frameworks, outlining areas for further research, and offering concluding reflections on the implications of the research.

Framed within Zambia's unique sociocultural and economic context, and guided by an inclusive innovation lens, the research question invited a deeper interrogation of how gender-specific policies function not only as supportive tools but also as potential sources of unintended exclusion. The findings reveal a layered and often contradictory landscape, one in which the same policy can be viewed as both a progressive gesture and a professional liability.

At the heart of this thesis is the argument that well-intentioned workplace policies cannot be meaningfully assessed in isolation from the systems in which they are enacted. The CIM developed for this study highlights how policy effectiveness is shaped by the intersection of organisational structures, cultural attitudes, and gender dynamics, a theme that emerged consistently across interviews and case analyses.

### 6.2 Summary of Key Findings

In answering the research question, the study revealed that:

- Organisational size and structure significantly influence how Mother's Day is implemented. Large firms, while formal, often introduce bureaucratic barriers; smaller firms offer Flexibility but risk inconsistency.
- Cultural attitudes and menstrual stigma remain powerful forces. In many workplaces, menstruation is still taboo, leading some women to hide the reason for their leave or avoid taking it altogether.

- Gender dynamics in the workplace shape how the policy is used. Senior women often avoid using it to protect their credibility, while junior women use it more freely but face increased scrutiny.
- Employer perceptions, especially those influenced by cumulative gender-specific policies, affect hiring decisions. Some employers view the policy as a cost, compounding hiring bias against women.
- Strategic adaptation by women demonstrates resilience. Many women actively negotiate how, when, and whether to use the policy, balancing professional expectations with personal wellbeing.
- The compounding effect of Mother's Day emerged as a critical finding. Rather than being viewed in isolation, Mother's Day is often assessed by employers alongside other gender-specific entitlements, such as maternity leave, nursing breaks, and flexible work arrangements. This accumulation reinforces the perception that women are more likely to be absent, making them appear less reliable or committed, and ultimately influencing recruitment and promotion decisions.

Taken together, these findings suggest that Zambia's menstruation leave policy operates less as a universal entitlement and more as a negotiated space, one shaped by power, perception, and positionality.

### **6.3 Theoretical and Practical Significance**

This research contributes to the growing body of African feminist scholarship by centring African women's lived experiences and policy engagement in formal employment spaces. It strengthens inclusive innovation theory by illustrating how innovations, like workplace policies must be evaluated not just by their intent, but by their inclusive outcomes.

Practically, the study offers several insights for policymakers, HR professionals, and advocacy groups seeking to design and implement gender-responsive workplace policies. It recommends:

- Reframing menstruation leave as part of broader wellness or self-care strategies to reduce stigma and normalise access.
- Integrating cultural sensitivity and gender training into policy rollouts to deal with unspoken biases.
- Ensuring consistent enforcement mechanisms across organisations to prevent discretionary misuse or denial of entitlements.

#### **6.4 Limitations and Areas for Further Research**

This thesis focused on formal employment within Zambia's financial and insurance sectors. While this provided a rich context, it may not fully capture experiences in informal sectors or across other industries. Future research could explore longitudinal career impacts, compare regional or rural perspectives, or examine how menstruation leave policies interact with broader feminist labour movements across the continent.

#### **6.5 Rethinking Inclusion**

Ultimately, this research invites a rethinking of what inclusion really means. Policies like menstruation leave are often introduced with equity in mind, but if their application reinforces silence, stigma, or exclusion, then their promise remains unfulfilled. Inclusion is not only about access, but about dignity and about creating conditions in which people feel safe, seen, and supported.

The leadership policy paradox observed in this study exemplifies this: when success demands that women reject the very tools meant to empower them, the policy itself becomes suspect. To transform this, organisations must go beyond compliance and create cultures of care, ones that normalise vulnerability, centre wellbeing, and challenge dominant productivity narratives rooted in male norms.

## 6.6 Final Reflections

This study was grounded in both academic inquiry and personal motivation, a desire to create fairer futures for women like my daughter, Woukira Frankie Hemsworth, and for countless others navigating workplaces not designed with them in mind.

Zambia's Mother's Day policy is not perfect, but it is a starting point. It opens space for broader conversations about menstruation, inclusion, and what it truly means to support diverse needs in professional spaces. As we imagine more inclusive workplaces, on the continent and beyond, we must continue asking not only what policies exist, but how they are lived, who they empower, and who they may unintentionally leave behind.

In that questioning lies the real work of inclusion. And in that work, we move closer to equity not just on paper, but in practice.

## NOTES

1. While this research uses the term “women” in alignment with the language of Zambia’s Mother’s Day policy and the dominant framing within the study context, I recognise that not all people who menstruate identify as women. The exclusion of trans and non-binary perspectives is a limitation of this study and presents an important area for future research.

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## APPENDIX 1: ETHICS APPROVAL



## Faculty of Commerce

**Private Bag X3, Rondebosch, 7701**  
2.26 Leslie Commerce Building, Upper Campus  
Tel: +27 (0) 21 650 4375/ 5748 Fax: +27 (0) 21 650 4369  
E-mail: [jacques.rousseau@uct.ac.za](mailto:jacques.rousseau@uct.ac.za)  
Internet: [www.uct.ac.za](http://www.uct.ac.za)

 @Commerce UCT  UCT Commerce Faculty Office

04 10 2022

Bwalya Chirwa

Graduate School of Business

University of Cape Town

REF: REC 2022/10/004

**Exploring menstruation leave (Mother's day) and other cultural factors  
that affect the representation of women in Zambian organisations**

We are pleased to inform you that your ethics application has been approved. Unless otherwise specified this ethical clearance is valid until 31-Dec-2023 .

Your clearance may be renewed upon application.

Please be aware that you need to notify the Ethics Committee immediately should any aspect of your study regarding the engagement with participants as approved in this application, change. This may include aspects such as changes to the research design, questionnaires, or choice of participants.

The ongoing ethical conduct throughout the duration of the study remains the responsibility of the principal investigator.

We wish you well for your research.

2022.10.04  
17:37:06 +02'00'

**Jacques Rousseau**  
Commerce Research Ethics Chair  
University of Cape Town  
Commerce Faculty Office  
Room 2.26 | Leslie Commerce Building

Office Telephone: +27 (0)21 650 2695 / 4375  
Office Fax: +27 (0)21 650 4369  
E-mail: [jacques.rousseau@uct.ac.za](mailto:jacques.rousseau@uct.ac.za)  
Website: <http://www.commerce.uct.ac.za/com/Ethics-in-Research>

## APPENDIX 2: RESEARCH PROPOSAL



### MASTERS' BY DISSERTATION ONLY:

#### APPROVAL OF PROPOSAL

FULL NAME OF STUDENT	Memory Bwalya Chirwa		
STUDENT NUMBER	CHRMEM001		
DEGREE REGISTERED FOR (Please circle)	MPhil <input checked="" type="checkbox"/>	MCom	MBusSci
DEPARTMENT	Graduate School of Business		
SUPERVISOR	Dr Preeya Daya		
*CO-SUPERVISOR/S	Dr John Fay		
DISSERTATION TITLE	Exploring menstruation leave (Mother's day) and other cultural factors that affect the representation of women in Zambian organisations.		

\*Note: Please indicate if your co-supervisor is external and from what institution/company or organisation he/she is from.

#### SIGNATURE

Student: \_\_\_\_\_

Date: 15 September 2022

#### SIGNATURES

We confirm that the above candidate presented a seminar on August 16, 2022, on the subject of this research proposal, and we, the undersigned, recommend that the proposal be approved.

#### **Presentation Panel**

Title, Name, Surname	Position/Relationship to Student	Date of Presentation
Dr Annika Surmeier	Faculty member	August 16 2022
Prof Ralph Hamann	Faculty member	August 16 2022
Dr Jess Auerbach	Faculty member	August 16 2022

Supervisor(s): \_\_\_\_\_

Date: 16 September 2022

Co-Supervisor(s): \_\_\_\_\_

Date: 16 September 2022

I hereby confirm that as Head of Department, I am of the view that the person(s) nominated as the Supervisor(s) is/are competent and has/have the time to supervise this student.

Head of Department: \_\_\_\_\_

Date: \_\_\_\_\_

## APPENDIX 3: PARTICIPANT CONSENT FORM

### MASTER OF PHILOSOPHY IN INCLUSIVE INNOVATION

#### INTERVIEW CONSENT FORM:

**Participant name:**

.....  
 ....

I volunteer to participate in a research project conducted by **Bwalya Chirwa as partial fulfilment of the requirements for the MPhil Degree** at the Graduate School of Business. I understand that the research is designed to gather information about **the menstruation leave policy in Zambia** and that I will be one of 32 people being interviewed for this research.

Background and purpose of the research

**This purpose of this research is to examine whether the menstruation leave policy influences the hiring and retention of women in Zambia.**

Ethics approval

Ethical consent for the study has been approved by the *UCT Commerce Faculty Ethics in Research Committee*

Participation and confidentiality

I understand that my participation in this research is voluntary, that I will not be compensated and that I may withdraw at any time.

The interview will take approximately 45 - 60 minutes to complete and will be audio recorded.

I understand that I will not be identified by name in any reports using information obtained from this interview and that my confidentiality as a participant in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies which protect the anonymity of individuals and institutions.

Consent

I consent to participate in this interview, based on the terms outlined above and subject to the following additional condition of my own (if any).

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**Signed by interviewee**

-----  
**Date**

.....  
**Signed by Student**

.....  
**Date**

## APPENDIX 4: ORGANISATIONAL CONSENT FORM



### MASTER OF PHILOSOPHY IN INCLUSIVE INNOVATION

#### ORGANISATION INTERVIEW CONSENT FORM:

Organisation name and address:

.....

.....

I grant full permission and consent for you **Memory Bwalya Chirwa NRC 116374/10/1** to conduct the study at my organisation. as partial fulfilment of the requirements for the MPhil Degree at the Graduate School of Business. I understand that the research is designed to gather information about **menstruation leave (Mother's Day) and other cultural factors that affect the representation of women in Zambian organisations** and that my organisation will be one of 6 organisations being interviewed for this research.

#### Background and purpose of the research

The purpose of this research is to understand the factors that influence the representation of women in the financial and Insurance sector in Zambia. The paper's focus is to research some of the cultural factors and the policy frameworks that influence the hiring and retention practices of women.

This research's practical implications and objective are to make a theoretical contribution to the literature about cultural factors and policy frameworks in the service sector in Zambia. Specifically, this research hopes to provide policymakers and employers with an evidence-based study that can help to inform their decisions and potentially play a role in accelerating the growth of the Zambian economy.

### MPHIL INCLUSIVE INNOVATION

To find out more about our world-class academic programmes, executive education short courses and customised programme offerings, contact:  
0860 UCT GSB (828 472) | INTL +27 (0) 21 406 1111  
info@gsb.uct.ac.za or visit us online at [www.gsb.uct.ac.za](http://www.gsb.uct.ac.za)



## APPENDIX 5: ETHICS APPROVAL

### Ethics approval

Ethical consent for the study has been approved by the *UCT (University of Cape Town) Commerce Faculty Ethics in Research Committee*.

### Participation and confidentiality

I understand that my organisation's participation in this research is voluntary, that I will not be compensated and that I may withdraw at any time.

The interviews will take approximately 60-90 minutes to complete and will be audio recorded.

I understand that my organisation will not be identified by name in any reports using information obtained from this interview and that the confidentiality of my organisation in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies which protect the anonymity of individuals and institutions.

### Consent

I give consent that my organisation can participate in these interviews, based on the terms outlined above and subject to the following additional condition of my own (if any).

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Signed by interviewee

-----

Date

Signed by Student

-----

Date



## APPENDIX 6: RESEARCH TOOLS

### RESEARCH GUIDE

My name is Bwalya Chirwa , I am conducting research on the menstruation leave policy locally known as Mother's Day. Thank you for taking the time to speak with me today about the menstruation leave policy in Zambia. This research's practical implications and objective are to make a theoretical contribution to the literature about menstruation leave and policy frameworks in the service sector in Zambia. Specifically, this research hopes to provide policymakers and employers with an evidence-based study that can help to inform their decisions.

If you have any further questions about the research or its aims, or if you would like to provide feedback on how the research was conducted, please do reach out to [chrmem001@myuct.ca.za](mailto:chrmem001@myuct.ca.za)

#### Main research question

How does the menstruation leave policy further influence the recruitment and retention of women in the financial and insurance sectors?

#### Sub questions

1. What is the profile of women (in terms of seniority, job role, age, etc.) who are more likely to take menstruation leave in Zambia's financial and insurance sectors?
2. How do Zambian financial and insurance women perceive and utilize the menstrual leave policy?
3. What are the perceived personal and professional implications for women who utilize the menstruation leave policy in these sectors?
4. What are the attitudes of employers in these sectors towards the menstrual leave policy?

### INTERVIEW QUESTIONS

Background Information (5 minutes)	
Can you tell me about your current role and how long you've been working in the financial/insurance sector?	
Are you aware of the menstruation leave policy (Mother's Day) in Zambia? If yes, what do you know about it?	

<b>Perceptions and Utilization of the Policy (10 minutes)</b>	
What do you think about menstruation leave (Mother's day)?	
Have you ever used the Mother's Day leave? Why or why not?	
If you have used it, can you describe your experience?	
How do you think your colleagues view this policy?	
In your opinion, how is this policy viewed in your workplace overall?	
<b>Menstruation Stigma in the Workplace (10 minutes)</b>	
How comfortable do you feel discussing menstruation-related issues in your workplace?	
Have you ever experienced or witnessed any negative attitudes or behaviors related to menstruation in your workplace? Can you provide examples?	
How do you think menstruation stigma affects the use of the Mother's Day policy? If at all	
In your opinion, how does menstruation stigma impact women's overall work experience in your sector?	
<b>Personal and Professional Implications (10 minutes)</b>	
What do you perceive as the benefits of using the Mother's Day leave?	
Are there any challenges or drawbacks you've experienced or observed related to using this leave?	
How do you think using this leave might affect a woman's career progression in your sector?	
Have you noticed any differences in how junior vs. senior women utilize or view this policy?	
<b>Employer Attitudes and Implementation (10 minutes)</b>	

How would you describe your employer's attitude towards the Mother's Day policy?	
How is the policy communicated and implemented in your workplace?	
Have you observed any changes in recruitment or retention practices since the policy was introduced?	
Do you think this policy affects how employers view women candidates or employees? If yes, how?	
<b>Suggestions and Future Outlook (5 minutes)</b>	
What changes, if any, would you suggest to improve the Mother's Day policy or its implementation?	
How do you think this policy could be made more effective in addressing both women's needs and workplace equality?	
<b>Conclusion (5 minutes)</b>	
Is there anything else you'd like to share about your experiences or thoughts on the Mother's Day policy?	
<p>Thank you again for your time.</p> <p>The next step in the research process is to produce a thesis.</p>	

**JOURNEY MAP EXERCISE**

	<b>Before getting to Mother's Day,</b> <i>What led to the need for Mother's Day? How was the request (if any) organised beforehand?</i>		<b>During the Leave moment</b> <i>What was said? How was it approached? Were there any notes taken/ action plans agreed upon?</i>		<b>Post-Mother's Day leave.</b> <i>Was there any follow-up discussion?</i>	
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
<b>What happened at each step?</b>						
<b>Who was present at each step?</b>						
<b>How did you feel? What emotions can you identify?</b>						
<b>What were the enablers?</b>						
<b>What were the barriers?</b>						
<b>What tools/ Guidance/ policies did you use/ reference?</b>						

## APPENDIX 7: RESEARCH PLAN

### Introduction to the research

This study is focused on Zambia's Financial and Insurance service sector and uses an interpretivist lens to employ a qualitative study in six organisations including..... This research's practical implications and objective are to make a theoretical contribution to the literature about menstruation leave and policy frameworks in the Financial and insurance sector in Zambia. Specifically, this research hopes to provide policymakers and employers with an evidence-based study that can help to inform their decisions.

The researcher Bwalya Chirwa, a Behavioural Designer and University of Cape Town Master in inclusive Innovation student will be in the .....office for 2.5 days, from August 01-03, 2023.

### Research methods

The research will be using 2 different research methods to help gain insights:

- **Semi-structured interviews:** asking staff a set of questions about their understanding of the menstruation leave policy, and what tools and resources they are aware of
- **Document review:** Talking to HR staff and reviewing HR policies

### Selecting participants for Interviews and Journey Maps

I hope to conduct around 10 one-hour interviews over the 2.5 days (approximately 4 interviews per day). I would ideally like to speak with 4 managers and 4 staff members who might have had challenges with navigating taking time off using the provided menstrual leave policy. I would also like to speak with 2 HR staff. Aside from job profiles, I am also interested in speaking with a mix of genders, especially managers.

	Manager	Staff	HR
Total Number of Interviewees = 10	4 (2 male & 2 Female)	4 (women)	2

**Beyond this, additional guidance for selecting Managers and Staff to interview are:**

- Gender parity within Manager and Staff category - at least 50% female
- Oversampling those who may have experienced a challenging time with using the menstrual leave policy in place. If no one fits this profile, then please feel free to recommend individuals you feel will be able to provide their candid opinions and experiences on the subject of the menstruation leave policy.
- The profiles of HR staff and staff counsellors are not necessary to consider.

### Overall Research Plan

#### Research setting

I would like to make staff feel as safe and comfortable to speak with me as possible. To help with this, I would appreciate a space in the office that is quiet.

### Scheduling

I would be grateful if you can help me identify staff, meetings and locations for the 2.5 day research, in the [sheet](#) provided.

## APPENDIX 8: RESEARCH SCHEDULE

### Interview Schedule

Please use the following table to help us structure 2.5 days of research; I have allocated blocks of time below to be allocated by yourselves to interviews. If any meeting start times conflict with the outline please make a note in a comment on that cell so we can adjust the outline accordingly.

Start Date	Tue, 8/1/23	Interval between interviews	90
		Start Time	9:00 AM

Time	Tuesday	Wednesday	Thursday
9:00 AM	<input type="checkbox"/>		
10:30 AM	★		
12:00 PM			
1:30 PM	<input type="checkbox"/>		
			✓

**LEGEND**

- ★ Special Condition
- Team meeting
- Need to Confirm
- Appointment Confirmed

Each meeting is scheduled for an hour with a 30 minutes buffer time

**Comments**  
*Tuesday 3 interviews, Wednesday 4 interviews and Thursday 3 interviews*

## APPENDIX 9: ATLAS.TI ANALYSIS

