



Trade and Gender – exploring a reciprocal relationship

Approaches to mitigate and measure gender-related trade impacts.



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Acronyms and Abbreviations

AA	German Foreign Office (Auswärtiges Amt)
AfDB	African Development Bank
(M)SME	(Micro) Small and medium-sized enterprises
AfT	Aid for Trade
ASEAN	Association of Southeast Asian Nations
BDS	Business Development Services
CoC	Chamber of Commerce
COMESA	Common Market for Eastern and Southern Africa
DAC	Development Assistance Committee (OECD)
EAC	East African Community
EIF	Enhanced Integrated Framework
EPA	Economic partnership agreement
FTA	Free trade agreements
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH, German Agency for International Cooperation
LDC	Least developed country
MERCOSUR	Southern common market
MDG	Millennium Development Goals
MoU	Memorandum of Understanding
MTS	Multilateral trading system
ODA	Official Development Assistance
OECD	Organisation for Economic Co-operation and Development
RTA	Regional trade agreements
SAARC	South Asian Association of Regional Cooperation
SADC	Southern Africa Development Community
UNCTAD	United Nations Conference on Trade and Development
VC	Value chain
WICBT	Women Informal Cross-Border Traders
WB	The World Bank
WDR	World Development Report
WEF	World Economic Forum
WTO	World Trade Organization



Introduction

Globalisation, economic reform and trade openness is widely assumed to benefit men and women equally within economic and trade theory. Research in the past two decades has however increasingly produced evidence of a more complex relationship. Economic policy, including trade policy and trade policy related instruments such as trade negotiations, trade facilitation, trade agreements and, as a result, value-chain development, have often impacted and benefited men and women differently. Research also hints towards the existence of a reverse relationship: prevailing gender relations and gender inequalities seem to influence the actual outcome of trade policy and trade policy related instruments.

The World Bank acknowledges this reverse relationship and the role of gender equality as an instrument for (economic) development, stating that gender equality is *smart economics* as it ‘can enhance economic efficiency and improve other development outcomes’ (WDR 2012).

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ), specifically the program Promotion of intra-regional trade potentials in the South Asian Association of Regional Cooperation (SAARC) region, has commissioned this paper. The Program was co-financed by the Australian Department of Foreign Affairs and Trade (DFAT). Its aim is to reflect on the interrelation between gender equality and trade, how development cooperation consequently can and is addressing the issue and how relevant results can be measured.

The paper is mainly directed at development practitioners and development organizations as well as partners in developing countries working in the area of economic development, specifically in trade and gender.

The underlying hypothesis of this paper is that due to existing gender inequalities, which are based in gendered norms and roles in economic and social systems, trade policy and trade policy related instruments do not automatically generate gender-neutral results. Possible differential effects and impacts on men and women resulting from trade openness and related trade agreements might thus exacerbate existing inequalities. At the same time, the reverse relationship is explored: existing gender relations and gender equality patterns can influence and constrain the actual outcomes of trade, trade policy and trade policy related instruments, possibly limiting productivity, competitiveness, growth and possible development benefits from trade.

The paper has been developed applying a desk review of relevant papers (secondary sources), selected interviews and wide consultation and research of relevant trade programs, mainly focusing on GIZ’s experience but also including selected relevant examples of other agencies.

The first chapter defines gender and trade and their relationship from a historical background in development cooperation. It identifies trade-related instruments, which are presented with their specific gender dimensions and approaches to mitigate trade gendered impacts in chapter 2. Specific practice examples are presented to enrich the analysis. Chapter 3 establishes the connection to how gender should be integrated into monitoring systems and presents an overview of gender-relevant indicators for trade programs.



1 Gender and trade – background to a reciprocal relationship

Trade openness is to benefit economies through the free flow of trade across borders directed at (new) markets. Evidence suggests that the creation of access to new markets and opportunities increases competitiveness and productivity, results in employment and income gains and can thus bring growth, while at the same time reduce poverty.

But, is growth resulting from increased trade really inclusive and benefits men and women equally and all strata of the population of a country overall? While this paper is not contributing new academic evidence to answer this question, it analyses relevant gender dimensions for trade and their significance for trade-related development cooperation.

Gender refers to the socially determined ideas and practices of what is seen as male and female (as opposed to the term sex, which refers to biological characteristics). Gender therefore denotes the socially given attributes, roles, activities, responsibilities and needs to women and men.

Gender equality denotes women having the same opportunities in life as men, including access to resources, opportunities and the ability to participate in the public sphere. Gender equity denotes the equivalence in life outcomes for women and men. (BRIDGE 2000)

1.1 Gender and development

Women around the world are disadvantaged in comparison to men when it comes to the distribution of wealth, employment levels and employment opportunities, wage equality, access to economic and social resources and assets (e.g. land, credit, productive inputs) and health and education. Finally, they also face major challenges in *de facto* possibilities to participate in decision-making. They experience discrimination in their economic and social lives and are as a consequence more likely to be poor than men.

Underlying *Gender relations*, *gender roles*, and *gender norms* determine the mentioned disadvantages women face in trade and economic participation. They assign differentiated entitlements and responsibilities to men and women in societies, often based on societal norms evolved through and influenced by culture, tradition, customs and religion.

Gender relations are the social relationships between women and men and refer to the power distribution between them. Usually they are characterised by unequal power distribution, and they define the ways in which responsibilities and resources are allocated.

Gender norms assign specific entitlements and responsibilities to men and women. They determine the distribution of and access to resources, wealth, work, decision-making and political power, and the enjoyment of rights and entitlements within the family as well as in public life. Gender roles relate to gender norms and are learned behaviours, socially and culturally constructed roles assigned to women and men and therefore changing and changeable over time.

1.1.1 Gender in development cooperation

Existing disparities and discrimination for women in the political, economic and social sphere shaped a feminist agenda to address the situation and status of women worldwide in the 1960-70s. Development cooperation started to integrate a special focus on women's issues in the 1970s with its **Women in Development (WID)** approach. WID focused on the specific advancement of women with women projects to answer and address their special needs,

highlighting as well potential benefits of investing in women for economic growth.

Increased international visibility of gender equality and attention to overall social and developmental processes brought a conceptual shift from the WID to the **Gender in Development (GID)** approach in the late 1980's. The GID approach emphasises gender roles and relations of unequal power between women and men as a root cause for gender inequalities and seeks their profound understanding in order to transform them. The ultimate goal is to enable women to participate on an equal basis with men and for men and women to engage and benefit equally in all spheres.

International World Conferences on Women, organised by the UN since the first in 1975 in Mexico up to the fourth World Conference on Women in Beijing in 1995 have shaped international action on women's rights and gender. 189 nations unanimously adopted the Beijing Platform for Action in 1995, marking a turning point in the fight for gender equality. It sets 12 areas of concern for the advancement of women, amongst them Women and the Economy. Its commitments are since then followed up, discussed, adjusted and/or complemented every 5 years. Important international treaties and conventions on gender equality complete the framework, the most prominent being the **Convention on the Elimination of All Forms of Discrimination against Women (CEDAW)**, adopted in 1979, ratified or acceded by 188 countries in April 2014.¹

Today, a **two-pronged approach** is therefore applied in development cooperation, including 1) **Gender Mainstreaming** to address and integrate gender issues, focusing on equal participation, access and control over resources for men and women at all levels of society, politics and programs and 2) specific measures directed at **women's empowerment** to counterbalance existing inequalities and discrimination of women.

The nowadays widely adopted gender mainstreaming approach in development cooperation seeks to ensure that concerns and needs of men and women are assessed, analysed and addressed accordingly within all spheres of development programs on a continuous basis to avoid further aggravation of existing gender

¹ Other relevant non-discriminatory conventions for trade include labour-related conventions targeting equal remuneration and the elimination of discrimination on employment and occupation by the International Labour Organization (ILO), conventions C.100 and C.111.

inequalities. It has led to development organisations and bodies adopting specific gender mainstreaming strategies cutting across all sectors. The specific focus on women and their empowerment however still provides important entry points in areas and/or countries where severe inequalities for women have been identified. The two approaches are not mutually exclusive and are often combined within programs and projects.

Gender equality and women's (economic) empowerment is increasingly seen as key to sustainable and inclusive development in all sectors of development cooperation. The growing number of gender indices² demonstrates the global recognition of the importance of gender equality for human development. The United Nations Millennium Development Goals (MDGs), to be reached by 2015, include gender and trade to varying extents. The discussion of a post MDG agenda with Sustainable Development Goals (SDGs) includes calls for a more comprehensive inclusion of both gender equality and trade.

1.2 Trade and development

The increase in flows of trade (exchange of goods and services) and capital and exchange of knowledge and information, fuelled by technological developments such as ICTs - in short, the globalisation the world has witnessed over the past 25 years, has marked deep economic transformation worldwide. It has altered the functioning of economic systems, markets and institutions and has led to diverse trade-related institutions and mechanisms.³ Trade in goods has increased remarkably in low- and middle-income countries from 31 per cent in 1993 to 57 per cent in 2008 (WDR 2012: 255). Trade volumes overall (including services) with developing economies have increased from 43 per cent of the nominal GDP in 1993 to 67 per cent in 2008 and 73 per cent in 2012 (UNCTADSTAT).

Trade cuts across a number of sectors and encompasses not only goods but also services, as the world economy has, to differing degrees between countries, shifted from (industrial) production to service-based economies. Within trade, specialization and division of labour leads to the concentration of economic entities on aspects of production, usually one with a comparative advantage. Trade is embedded in national economic systems and shaped by international and (often overlapping) regional agreements. In conjunction they determine the way in which a state or nation allocates its resources, produces and distributes goods and services (at local, national, regional and international level). Social systems and practices, amongst them gendered roles and norms interact with economic systems – and therefore ultimately influence the distribution of benefits and impacts.

Trade is the economic exchange of goods and services and can happen nationally or across borders (international and/or regional trade).

Trade openness or trade liberalisation seeks to enhance international and regional trade through the removal of trade-related barriers, such as tariffs, import bans or quotas and non-tariff barriers (bureaucratic or legal barriers that might hinder free trade).

1.2.1 Trade-related institutional framework

Globalisation and its related worldwide economic transformation and increased integration have also transformed the institutional framework managing international trade. The **World Trade Organization - WTO**, is an intergovernmental and membership-based trade organization, which provides a framework for negotiating and formalizing trade agreements. The main aim is to further liberalise international trade and open markets for trade by reducing or removing tariffs (taxes levied on imported goods) and removing other trade barriers (e.g. quotas). It is the keeper of the multilateral trading system (MTS) that has been set up.

2 Examples are the Global Gender Gap Index (WEF, 2006), the Social Institutions and Gender Index (SIGI, OECD), the addition of the Gender Inequality Index (GII, UN, 2010) to the Human Development Index (HDI), and global reports such as the WDR 2012 on Gender Equality and Development

3 While trade is recognised as important for economic development, the depth of globalisation, free trade, related free trade agreements and institutions such as the WTO, are hotly debated topics and largely associated with neoliberalism. The discussions also cover the emphasis the international economic system puts on growth vis-à-vis ending natural resources and climate change, the diverse effects liberalisation and capitalism have produced, e.g. a growing divide between the rich and the poor worldwide with a strong gender component – to only mention a few relevant topics. This discussion is also related to the newly emerged term of 'inclusive growth', which seeks to combine 'strong economic growth with improvements in living standards and outcomes that matter for people's quality of life (e.g. good health, jobs and skills, clean environment, community support)' (OECD website). It is highly relevant for development cooperation and approaches to be applied. The scope of this paper unfortunately cannot depict all relevant arguments in detail around this discussion but regards gender as an important component of the inclusive growth agenda.

The **Multilateral Trading System (MTS)** is made up of agreements that are the legal ground rules for international commerce. Its legal and institutional foundation is the intergovernmental **World Trade Organization (WTO)**. The WTO manages and regulates trade at the international level, based on multilaterally agreed rules and regulations. Having been set up in 1995 under the Marrakech Agreement, the WTO follows the 1948 General Agreement on Tariffs and Trade (GATT). It is a permanent forum of 160 members (June 2014). WTO trade agreements are signed by representatives of member governments and have to be ratified by their respective parliaments.

In addition to and in accordance with existing WTO trade agreements, **regional trade agreements (RTAs)** increasingly constitute a key component of trade openness since the early 1990s. Their aim is to deepen internal trade links between countries (not necessarily lying within the same geographical region) and/or countries and regional CUs or common markets (Wagner 2012). **Bilateral TAs**, another important category, negotiated outside of the WTO, are TAs agreed and negotiated between two countries. They often cover a smaller range of specific goods. Bilateral TAs also exist between a block, e.g. a CU and a country. Many of the bilateral EU agreements fall under the Economic Partnership Agreement (EPA) with African, Caribbean and Pacific (ACP) countries.

With trade openness, countries and economic actors are encouraged to specialise in particular goods and services according to their own 'comparative advantage'. This implies reallocation of production facilities, capital investment and labour across countries. At political level, trade openness is therefore often related to (macro)economic reforms, including, e.g. financial, trade and labour policy, the overall regulatory framework and relevant institutional reforms to be able to comply with the changed framework.

1.2.2 Trade and development cooperation

The consequences of trade openness are manifold. Through the reduction of tariffs, cheaper goods enter

national markets, mostly beneficial to consumers. At the same time this inflow affects male and female producers, as their goods and prices might not be able to compete. Increasing competitiveness through adaptations in production processes and enhanced quality, e.g. by conforming to required standards (ISO, health, safety and working standards and/or voluntary standards), might be triggered. However, this often requires lengthy adjustment processes and additional productive resources - affecting women in particular facing due to their limited access to such inputs.

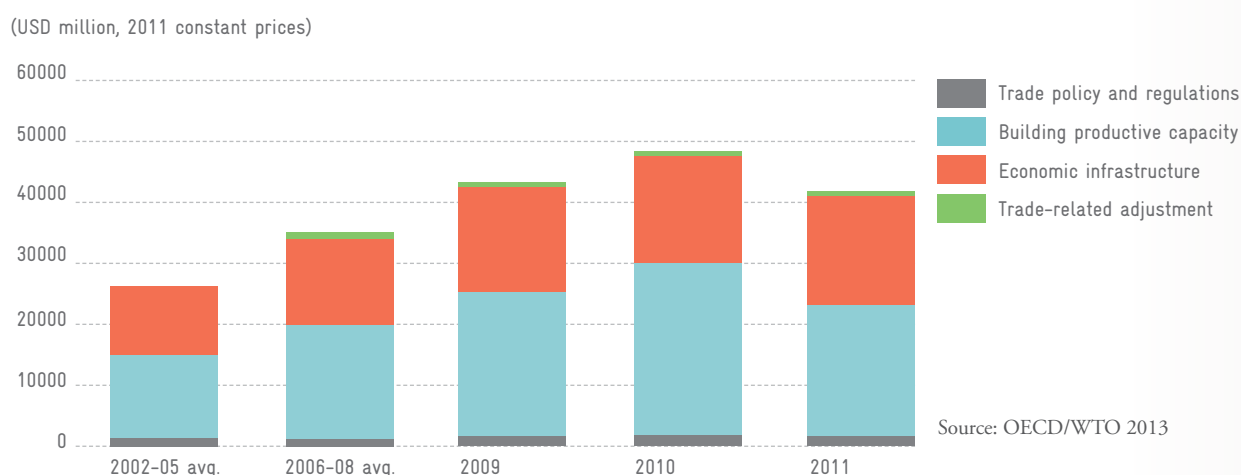
The WTO, pursuing distributive aims, has recognised that LCDs require redistributive mechanisms (Mengesha 2007). It therefore applies special and differential treatment for countries in development, especially LDCs, to fully implement trade agreements, trade facilitation reforms and related regulations. The differential treatment is based on categories, recognising possible structural weaknesses and low capacity for the implementation of the agreements and regulations. Therefore, larger adjustment periods and/or additional technical assistance, e.g. through the Enhanced Integrated Framework (EIF) and Aid for Trade (AfT) are applied (ITC 2013).

To specifically support least developed countries (LDCs), the WTO established the **Enhanced Integrated Framework (EIF)** in 2005, which became fully operational in 2009. Its aim is to support LDCs as they expand their trade in the planning and implementation of sector-wide approaches to trade promotion through multilateral programs and a multi-donor trust fund. It is therefore also a mechanism to access **Aid for Trade (AfT)**.

The **AfT** initiative was launched in 2005 by members of the WTO against the background that countries in development require additional assistance in their trade liberalisation and trade reform process and for the implementation of trade agreements. AfT is an important subcategory of official development assistance (ODA). The volumes of aid-for-trade are measured in categories of a) technical trade-related assistance (e.g. development, negotiation

⁴ Prominent examples of regional trade agreement are the North American Free Trade Agreement – NAFTA between Canada, Mexico and the United States of America or the Transatlantic Trade and Investment Partnership – TTIP, currently under negotiation between the United States of America and the EU and the ASEAN free trade area AFTA. Customs unions like the EU, MERCOSUR, EAC and COMESA are also considered regional trade agreements.

Figure 1: Aid for trade commitments



and implementation of trade agreements, trade policies, strategies etc.); b) trade-related infrastructure; c) productive capacity development (including trade development); d) trade-related adjustment assistance (e.g. related to costs from trade openness, reduced revenues from the removal of tariffs etc.) and e) other trade-related needs as identified in the countries' development strategies. (OECD/WTO 2013)

Development partners provide aid for trade through a variety of financing mechanisms (e.g. pooled funds, trust funds, grants) as part of their overall ODA commitments. Overall AfT commitments across the different categories amounted to 66 billion USD from 2001-2011 and show an increasing trend over the years (see figure 1).⁵ While other sources of finance (FDI, South-South partners, domestic private investment) have gained importance in trade for developing countries overall, ODA is still regarded as the most important source for LDCs (OECD/WTO 2013).

Trade liberalisation requires functioning political regulatory frameworks as well as business structures and institutions and business related capacities. Private sector development (PSD) is therefore often a large part of trade-related programs. Development partners assign PSD a growing importance as an important tool and pre-requisite for trade liberalisation, reflected in commitment increases to the AfT category 'building productive capacity'.

1.2.3 Instruments for trade openness

A number of instruments advance trade and trade openness at international, regional and national level and interact with trade policy: instruments influence (trade) policy, institutions and related (social) systems at different levels and are thus intertwined with domestic fiscal, monetary and labour market policies. These impact employment, livelihood and poverty outcomes for men and women, ultimately at household level. Trade policy related instruments therefore cut across and affect all levels of systemic competitiveness.

Three trade policy related instruments, their gender dimensions and relevant approaches are further assessed and explored in this paper:

1. **(Negotiation of) Free trade agreements (FTA) and regional trade agreements (RTAs)** as policy level instruments to advance trade openness and the trade liberalisation agenda;
2. **Trade facilitation** as a process determining and altering regulations and procedures for trade;
3. **Development of (global, regional and sectoral) value chains**, often part of PSD programs, directly determining comparative advantages and exports for trade.

Chapter 2 discusses them in detail with their related gender dimensions and concrete approaches to reflect gender.

⁵ It remains to be seen whether the fall in commitments in 2011 in comparison to previous increases is temporary, e.g. due to the global economic crisis and a related time lag.

Table 1: Understanding gender-differentiated trade impacts – gender-relevant questions to ask

Main question	Differentiated sub-questions in order to explore the issue
What are gender-differentiated impacts of trade openness?	Are men and women, and in which way, impacted differently by trade openness? Who benefits (men/women, age groups, ethnic groups, geographical locations) and to which extent (from export opportunities, expanding sectors, imports etc.)? Who loses out (and what) and under which circumstances (e.g. who will be most affected by contracting sectors, reduced revenues due to tariff cuts)?
What are impacts of gender inequality on trade outcomes?	How do existing gender-based inequalities impact trade policies and trade policy-related instruments' outcomes? What might be possible gains (quantitative and qualitative), if gender equality would be reached/increased?
Which obstacles and constraints impede women to equally participate in trade?	What specific obstacles and constraints prevent women from (equally) participating in trade within a specific sector and sub-sector? How is access to and control over economic resources and inputs distributed among men and women? What are underlying gendered economic roles, differences in entitlements, access to and command over (which) economic resources and inputs that determine participation and benefit from trade? To which extent are men and women involved in formal/informal employment? How large is the gendered-wage gap? Who benefits and to which extent from increased exports in a sector/VC and at which level (functional node) of the VC?
How gender-aware are trade policy, trade agreements and trade-related instruments?	Do trade policy, trade agreements, trade facilitation processes, export promotion, impact assessments etc. take gender into account? To which extent and focusing on which aspects? Do they present (and ultimately pursue) meaningful (counter)measures?

1.3 Gender-differentiated impacts of trade

It is recognised that economic development and growth through trade openness positively impacts the development of a country, including women. Assuming however that free trade automatically benefits every stratus of a society would fall short of recognising existing inequalities. Social and economic disparities of men and women due to gendered economic roles determine how women and men, young and old and different ethnic groups benefit from trade, especially in developing countries.

When exploring the question of trade impacts on gender (as well as the reciprocal relationship), a number of gender-related questions arise for further analysis.

Table 1 introduces main questions and related sub-questions, which are discussed in the following sections at aggregate level (see chapter 2 for details on the last question).

1.3.1 Gender-differentiated impacts of trade openness

The impacts of liberalisation of international trade on gender are still ambiguous. The absence of gender-differentiated data and the difficulty of disentangling the effects of trade openness from other simultaneous changes make it even more difficult to assess all the empirical evidence (Higgins 2012a). However, some relevant observations on the interrelationship of trade openness and gender can be drawn. They however first require a closer look at gendered economic roles influencing economic participation and trade outcomes overall.

Gendered economic roles

The consequence of gender relations, norms and roles in a society is the **gendered division of labour** that allocates different jobs or types of work to men and women, usually by tradition and custom. Women in developing countries take over most of the unpaid household and caretaking tasks and are more likely to work in underpaid and non-regulated, often informal, jobs. The gendered division of labour is thus translated into **gendered economic roles**.

As a consequence, **women and men engage in and benefit from economic activities differently**. In their multiple economic roles as workers, producers, entrepreneurs, traders, home managers, taxpayers and users of public services, women face a series of specific challenges. Generally speaking, **women are more**

likely to be found in precarious forms of work, suffer from time and resource constraints, might lack (access to) skills, information and networks, are exposed to security threats and gender based violence and are more likely to be affected by fiscal reforms (Higgins 2012b).

As **consumers** however, women also have an important trade-related economic role, as they often take decisions of household consumption. In developed countries, women seem to make more ethical consumer choices and buy more socially labelled goods than men (OECD in von Hagen/Willems 2012), often originating from developing countries, thus impacting international development of trade.

Gendered (economic) roles and gender-related challenges for women in developing countries

As workers, producers and entrepreneurs women...

- tend to be concentrated in a few sectors (food production in agriculture, garment/textile industry and domestic services);
- have limited access to productive assets (land, capital, inputs...);
- work in lower occupation levels than men and at lower functional nodes in VCs;
- produce food crops for the family while men produce cash crops based on their productive time;
- have limited access to (business) skills development and training;
- face (time- and structural) constraints in participating in trade associations, cooperatives.

In their role as traders, women...

- face time constraints (due to their caring roles) and security issues preventing them from travelling longer distances, e.g. to reach markets that offer better prices and conditions;
- have limited control over transportation means, including draft animals, bicycles and carts;
- face greater levels of harassment (sexual harassment, payment of bribes etc.) than men by market, trade or border officials;
- receive too little for what they sell (sometimes due to no alternatives but also due to lack of up-to-date information of market prices).

As home managers, women...

- are assigned a mainly (unpaid) caring and reproductive role critical to the productivity of the labour force and the well being of the population;
- face restrictions in movement due to their caring responsibilities or religious norms;
- are more vulnerable to economic shocks resulting in changing relative price of necessities because of unequal intra-household resource allocation.

As tax payers and users of public services, women...

- are likely to be affected differently by fiscal reforms. Taxes on basic consumption goods for example impact women in their responsibility for the household more directly (Higgins 2012b);
- are affected disproportionately by cuts in public services, e.g. due to ceased tariff revenues.

Adapted from Higgins 2012b.

Female employment

Socially constructed gendered economic roles determine women's unequal benefits from trade resulting in lower female employment rates, lower wages, less social recognition, lack of skills and self-esteem. Globalisation and trade openness have at the same time produced some positive results. They have conveyed international and regional economic integration, technological diffusion and greater access to information worldwide, including for women. The WDR 2012 Gender Equality and Development finds increases in female labour force participation across countries and at every income level between 1980 and 2008.

Increased employment opportunities and wages for women are usually named as the main positive effects of trade liberalisation. Research however also indicates, that a country's economic and industrial structure determines these potential employment benefits for women from trade liberalisation: paid (formal) employment and wages of women increase mainly in labour-intensive production, manufacturing and service exports (Klugman/Gamberoni 2012). It increases in instances when the country's comparative advantage lies in female-labour intensive sectors, e.g. in the manufacturing textile and apparel industry (Do et al 2011, Wagner 2012). Examples are the ready garment industry in Bangladesh or the Kenyan flower industry. In countries with a comparative advantage in usually more technology-based and industrially advanced male-dominated sectors, trade openness will consequently produce less positive effects and benefits for women and might exacerbate gender inequality. It is thus important to look at what type of additional employment opportunities (including working conditions) are created.

Trade openness in itself creates prize pressure in some industries and often results in a restructuring of the labour markets. Besides positive effects in some sectors, this can lead to **volatile employment, rising need for flexible workers, bad working conditions or unemployment in certain sectors**. Such shifts affect the poorest and most vulnerable groups most. They can also contribute to growth of informal employment, where, again, women are overly represented and suffer from a larger gendered wage gap (WB 2014).

Increased income for women is an employment-related relevant variable. It determines, in conjunction with the perception of their productive work, increased social status, also within poorer communities, and self-esteem (an argument widely supported by results of practice examples in chapter 2). Personal income of women is often highlighted as important, also in this paper, but also criticised. Increased personal income of women does not necessarily signal increase for personal consumption, due to intra-household distribution. But it can lead to greater empowerment of women in the household and the community, control over household resources and therefore a rise in economic power and autonomy. The de facto control over the additional income is, however, highly dependent on the social context and prevailing gendered roles.

Trade openness is further said to create benefits for consumers through cheaper imports. However, two (gender-relevant) dimensions ought to be considered. Firstly, the type of cheaper imports (and who needs or can afford them) determines the actual benefit. Secondly, they can destroy national (female employment intensive) industries. In these instances developing countries face loss of (female) employment and a return to exporting raw materials. This leaves the value addition –and wealth creation– to others. These processes have been witnessed, e.g. with the influx of cheap textiles from China in African countries such as Lesotho, Ghana, Nigeria and Zambia.⁶

Overall, if women control their income, benefits for future generations are probable, as **women invest in their children's education, health and family welfare to a larger degree than men**, evidence suggests (Higgins 2012b). In addition, education levels of women are likely to rise, as newly created jobs demand literacy and numeracy.

Access to trade-relevant information

The spread of information and communication technologies (ICTs) have generally increased women's access to economic opportunities and are relevant to trade outcomes. The WDR 2012 has established that ICTs reduce time and mobility constraints of women when it comes to accessing (trade-relevant) information and markets. They allow (female)

⁶ It can also be argued that the textile industries have never been competitive in the first place and cheaper textiles benefit especially the poor. Nonetheless, it shows that the impacts and benefits or losses are manifold and need to be properly analysed, including impacts on gender equality and poverty, to inform political and economic decision-making. See chapter 2 for approaches.

farmers and entrepreneurs to directly communicate with their clients, take business decisions and negotiate prices based on actual and up-to date information, e.g. through the use of mobile phones and mobile phone based services. Owning mobile phones directly impacts increased incomes, as 41 per cent of women interviewed in Bolivia, Egypt, India and Kenya have stated, with even higher impacts among female entrepreneurs (WDR 2012: 262).

Mobile phones also allow increased transparency and public control on payments of bribes related to trade at border crossings, customs schemes etc., often benefiting women in particular (see example TRIMS in chapter 2). Nonetheless, as with other assets, women are still less likely to own or use a phone, e.g. in Africa (with the exception of South Africa) – a gender gap worth closing (WDR 2012). Access to information and exposure to different cultures, e.g. through television, internet and technologies might also support shifting gender roles and norms towards more egalitarian attitudes (WDR 2012).

1.3.2 Impacts of gender inequality on trade outcomes

The impacts of gender (in)equality on trade outcomes are still underexplored. The main point of departure however is that gender equality can facilitate economic growth, e.g. through a more productive workforce, including larger shares of women. Equal access to education and skills development levels however at the same time determine employment outcomes, leaving potential for economic growth untapped. The WB has in its WDR 2012 established a relationship between larger exports in sectors of female-intensive labour and higher gender equality (female labour force participation, lower fertility rates and higher educational attainment). Gender inequality can thus undermine economic growth and poverty reduction as goals of trade openness and produce additional developmental costs (see also Higgins 2012b).

The World Bank has assessed that Uganda, for example, could increase its GDP by 2 percentage points, if gender inequalities in access to education and formal employment are addressed (WB 2004). For Kenya, improving gender equality in access to education and agricultural inputs could result in a one-off 4.3 percentage points increase of the GDP,

followed by yearly increases of 2-3 percentage points (WB 2007).

More of the same reveals another conclusion: with same access to land and productive resources (taking into account business size and sector of operation), the often cited differences in productivity between male-owned and female-owned businesses in agriculture actually level (WDR 2012).

In sum, gender-related constraints and gendered roles and division of labour influence productivity, economic development and thus trade outcomes.

1.3.3 Constraints for women to benefit from trade and trade openness

There are a number of constraints for women to benefit equally from trade openness and related TAs. Section 1.3.1 discussed how gendered roles in the economy and at household level determine levels of access to (and control over) assets, human capital, labour markets and earnings of women and men.

The gender gaps differ considerably between regions and countries, as they are related to cultural norms, traditions and religion. Therefore, thorough analysis is required. It also has to be stressed that men, especially poor men, face similar or the same challenges in some areas - to differing degrees. Nonetheless, the following areas constitute gender-intensified constraints for women based on existing inequalities to materialise equal benefits from trade:

- Access to and control over key assets and productive resources: land, energy, physical, financial and human capital to fulfil their export and trade potential;
- Access to education, (business related) skills development and training;
- Access to information and business networks crucial for business success;
- Trade facilitation, logistics and transport constraints (restrictions in movement due to reproductive and caring tasks, access to means of transports etc.)
- Gendered occupational segregation (women assumed suited for certain types of work, usually with lower wages and less responsibilities) (Higgins 2012a).

It becomes apparent that not all barriers are directly related to or rather resulting from trade. Nonetheless, they often determine low productivity, insufficient volumes and lack of information, keeping producers and owners of (M)SMEs, particularly **women, to stay afar from newly emerging export markets and opportunities**. These gender-related barriers shape relevant framework conditions for trade outcomes and benefits for women.

Additionally, national tax revenues are affected with increasing trade openness, as previously collected taxes from tariffs on imported goods cease. This might also affect the **states' re-distributional spending on social services**, affecting the countries' poor, whereof women constitute the majority.

In conclusion, besides the fact that most of the developed and developing countries are signatories to gender-relevant and human rights based international conventions and agreements, gender inequality is costly, hinders countries to live up to their full economic potential and diminishes their ability to compete internationally. Increased female participation in trade furthermore has a number of positive

developmental effects, such as improved income and social status, reduced fertility rates, and ultimately improved education (Higgins 2012b). Additionally, gender equality is becoming more important as the world public and global consumers demand anti-discrimination policies, fair wages and 'decent' working conditions, as the rise in application of voluntary standards with a social dimension illustrates.

As outlined, distributional effects of trade openness are not necessarily benefiting women and men equally and therefore require specific attention. The following chapter explores where and how this should be undertaken.





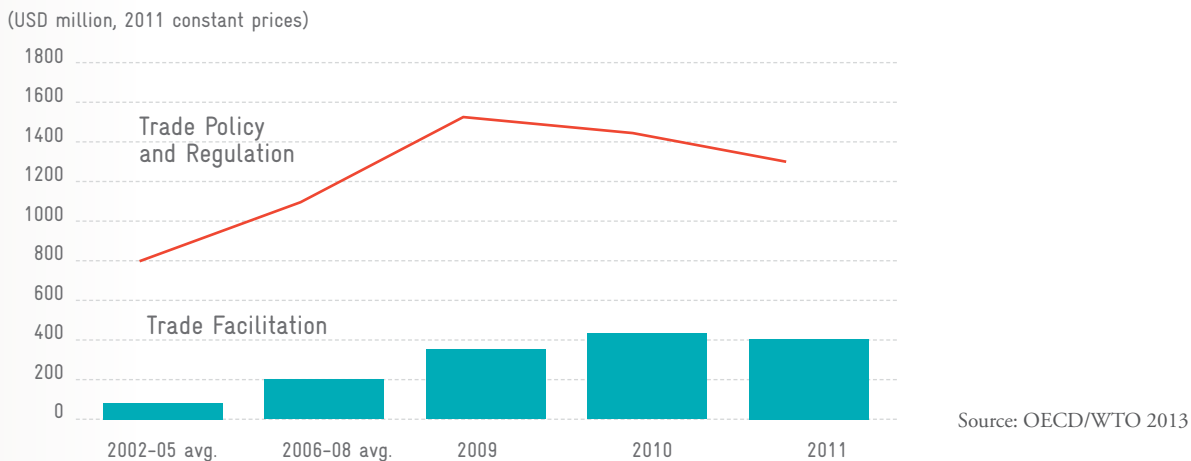
2 Gender dimensions and approaches to address gender in trade-related instruments

Trade and TAs determine trade policy and trade reforms, affecting women and men through changes in prices, employment and production structures and competition. The impacts vary in different national contexts, but also due to the differential positions of the individuals in the economic system.

Ensuring gender equality and equity in trade and trade-related measures at all levels matters due to three interrelated dimensions:

- economic dimension – potential losses in economic development, gender equality matters for business;
- developmental dimension – potential social costs and poverty increases resulting from gender negative impacts from trade;
- human's rights dimension – contains the right to non-discrimination, equal rights and benefit before the law. (adapted from Higgins 2012b).

Figure 2: Aid for Trade Policy and Regulation



In the following, issues in relation to the trade policy related instruments on gender under discussion are presented with approaches to be applied. Specific practice examples illustrate relevant existing instruments and approaches and their results.

2.1 Gender dimensions – trade agreements and trade policy

In terms of AfT commitments, the category trade policy and regulation receives relatively little attention in comparison to others: it only accounted for 3 per cent of total AfT commitments in 2011. Nonetheless, commitments to this category have overall increased compared to the baseline. An interesting detail is that support to multilateral negotiations has declined by 4 per cent in relation to the baseline (OECD/WTO 2013).

Trade negotiations and TAs between countries as part of the MTS centre on trade liberalisation through the promotion of trade in certain sectors. Tariff reduction, customs cuts and the elimination of quotas etc. are negotiated at WTO level between the various partners in order to open economies to global trade.

As WTO multilateral negotiations have advanced at a slow pace, regional trade agreements (RTA) are on the rise. They provide an alternative route to pursue trade openness, and negotiations are easier to settle, since they include fewer partners. RTAs seek to favour developing economies through preferential treatment and research has shown, that some of them indeed include a number of social issues. They might therefore also in future offer a good entry

point to mainstream gender, such as labour standards, gender analysis and social and poverty related impact assessments (including gender), into trade agreements (Wagner 2012).

Trade agreements and trade negotiations have historically focused on economic issues, reduction of tariffs and facilitation of trade alone, leaving out social issues, amongst them gender. They were largely considered gender neutral, as they did not appear to treat men and women differently or disadvantage them (Wagner 2012: 505). Differentiated impacts of trade and TAs were thus not considered. Evidence shows that most trade agreements are still formulated gender neutral. They are therefore in fact gender blind, as they do not take into account existing gender biases and inequalities (Wagner 2012).

Due to the existing gendered division of labour it matters how liberalisation and TAs will remodel the national economy and the labour market. Which sectors will expand with TAs/RTAs, which will possibly contract? Who will be affected – men, women, the poor, in which geographical area? The gender composition of the workforce in expanding sectors, if female intensive, can narrow the gender gap in market participation – but also vice versa, as discussed in section 1.3.1.

Cutting tariffs and taxes, usually happening with an opening to international trade, might lead to decreased government revenues – which might in consequence lead to cuts in the public provision of social services. In their role as carers, women are usually the ones benefiting most from social services and consequently suffer most from cuts.

Diagnostics, assessments and research, using gender-relevant data and information help to inform trade agreements, trade policy and AfT-programming. They then analyse the impact of trade liberalisation on men's and women's lives, gender relations and power relations. Especially within the EIF or the Economic Partnership Agreements (EPAs) of the EC (see 2.1.1 for more on ECs approach with SIAs), thorough analysis would make a difference for the negotiation of preferential treatments and relevant AfT, including gender.

The following gender-relevant issues apply in relation to FTA and RTAs and trade policy:

- TAs/RTAs are not gender neutral if they don't distinguish between (trade outcomes for) men and women, in fact, they are gender blind.
- Trade negotiations often represent and reproduce existing gendered structures. Men are thus overrepresented and women underconsulted.
- Gender-differentiated distributional effects of trade are not identified, if no gender-relevant (social and economic) impact assessments are conducted.
- Trade reforms, policies, trade agreements and AfT will –without knowledge about gender-related impacts of trade- not include any corrective measures and/or additional clauses.
- Trade negotiations, for (trade) policy reforms and AfT need to take into account TA-related gendered impacts through potentially expanding (or contracting) sectors.
- The overall losses in government revenues through tariff cuts and compensatory efforts need to be a) analysed and calculated and b) designed in a way not overly affect women, children and the poor.

In sum: negative impacts on gender equality through trade can be prevented with sound analysis and gender-sensitive trade agreements, negotiations trade policies and complementing measures and/or targeted aid for trade.

2.1.1 Issue: In-depth knowledge of differentiated impacts of trade: Who is affected by TAs/RTAs and in which way?

In preparation of trade agreements, a number of countries develop ex-ante impact assessments with varying scopes and covering different topics, most of them environmental aspects (UNCTAD 2009). In-depth knowledge about how a TAs/RTAs will affect women and men in certain sectors, their livelihood etc. is not assessed on a regular basis and is not compulsory.

Trade agreements (international or regional) seek to increase cross-border trade. They therefore, by default, focus on increases in production and trade, thus on exports of goods and services. Increases are assumed based on price changes through the removal of different trade-related barriers and regulations, increasing competitiveness of products and services. Consequently, TAs have potential gendered macro-level effects. They can narrow existing gender gaps in market participation, contributing to gender equality. However, this is only the case if the sector(s) for liberalisation and increased export opportunities represent high or equal female involvement (Fontana 2009: 10, see section 1.3.1 for more).

Furthermore, if sectors with high female participation are affected by cheaper imports and shrinking as a consequence, these positive effects might either be neutralized or even negative.

Additionally, the quality aspect of female employment is important. It is not only relevant that women enter the world of paid work, but also under which working conditions and at which occupational levels.

Approach: diagnostics, impact assessments and PIA / PSIA

Applying a gender perspective in trade agreements and trade policy should depart from the idea of creating inclusive growth and prioritise the different needs and rights of disadvantaged groups, in particular (poor) women.

Trade agreements and the areas/sectors they target therefore need to be **analysed ex ante for sustainability and gender-differentiated impacts** related to reach inclusive growth. Topics would include poverty (possibly subdivided into groups), gender, environment and others. In addition, outcomes of ex-post impact assessments of liberalised trade effects on gender equality and equity should

also be considered and included in TAs or overall frameworks of agreements in form of gender-related clauses, related policies and additional assistance to mitigate identified effects.

Women's organisations have over the past decades repeatedly and increasingly demanded gendered analysis' across all sectors, in addition to the need for (more) gender-relevant data and overall data disaggregated by sex (see chapter 3 on data, indicators and monitoring). Increasingly this issue is also taken up in studies and papers commissioned by bilateral or multilateral developmental organisations.

The following tools for poverty and social analysis can be used to gather information on trade-related gender impacts:

- Poverty Impact Assessment (PIA) / Poverty and Social Impact Assessment (PSIA)
- Diagnostic Trade Integration Study (DTIS) – ex ante analysis tool within the EIF
- Sustainability Impact Assessment (SIA) – ex-ante analysis tool of the EC
- Gender analysis – within a sector or across sectors
- Gendered export development opportunity analysis
- (Pro-Poor and/or gendered) VC analysis, VC mapping (see section 2.3 for more on this).

They would typically be applied for either for the overall TA-framework and sectors or can be done for key sectors or a specific sector alone. Their approach should be participatory and ensure consultation of relevant stakeholder, among them women and groups with usually lower voice in policy and planning processes (ODI 2010).

PIA and the even more comprehensive PSIA as analysis tools provide information on distributional effects and/or expected poverty impacts in a sector and type of business, a (trade) policy or TA/RTA. Their information base is disaggregated information (usually by sex, ethnicity, location and livelihood in a sector or type of business) on social and economic opportunities, risks, and barriers, including employment, assets, winners or losers and others.

PIAs and PSIAs can be applied ex-ante or also ex-post. They inform TAs and the policy level, but can, ex-ante, provide valuable information, including gender, program design. Program approaches can thus be better designed to take into account and influence existing gender inequalities, be inclusive and support pro-poor growth. Ex-post conducted PIAs or PSIAs can also help, e.g. as part of an evaluation, to assess impacts and serve as an important tool for future programs.

The following two examples show how assessments influence gender approaches of relevant trade programs.



Nepal became the 147th member of the World Trade Organization (WTO) in April 2004. The WTO-EIF Support Program was commissioned by the German Government to support Nepal from 2010-2012 in the implementation of its comprehensive accession package through GIZ. It was based on prior support provided as part of pilot projects in the area of trade in Nepal. After successful completion of the WTO-EIF Support Program, the Nepalese Government requested further bilateral assistance from the German Government through GIZ in the area of trade promotion.

The WTO-EIF Support Program, besides strengthening of capacities, effectiveness and resources of the Nepalese Government in the strategic implementation of the WTO commitments, provided strategic support to specific sectors.

Gender dimensions. International and national labour migration by Nepalese, in their vast majority men, has dramatically increased over the past decade. This has led to an increase in female-headed households, primarily in rural areas. The migration pattern results in the necessity of high economic involvement for women, especially if remittances are low and overall in increased pressure and women's workload.

Instrument. The sectors for support in trade facilitation and trade promotion through GIZ were selected based on government priorities and used the results of a selection matrix developed with a strong focus on social inclusion. The matrix had revealed that gender, respectively the mainly female involvement, is a main component of the Medicinal and Aromatic Plants (MAPs) VC and the inclusion of marginalised castes within Silver Jewellery. The Nepalese Government prioritised Medicinal and Aromatic Plants sector (MAPs) as a sector of comparative advantage for export and asked for support in the development of a strategic action plan for the whole sector.

Instrument. Steering for improved outcomes based on PIA-result. Women dominate farming and collection in the VC of MAPs in Nepal.

In order to analyse the poverty related impact of action points identified for the sector and to prevent possible negative poverty impacts, the program undertook an ex-ante Poverty Impact Assessment (PIA) of the planned sector activities. A group of Nepalese stakeholders from the private and the public sector and GIZ colleagues carried out the PIA, applying the PIA modules with the foreseen consultations and tools.

Results. The results of the PIA showed that no negative impact on poverty would be achieved. However, some approaches proved to be neutral in their poverty impact. The PIA thus provided valuable information for adjustment of some approaches in order to increase positive impacts on poverty levels for the predominantly female beneficiaries. Within a different sector, the strong poverty-focus would have been broadened to a deeper assessment of specific impacts on gender equality, as this can be easily done with some modifications in the PIA modules and the type of information collected.

Within the subsequent GIZ trade promotion program Inclusive Development of the Economy - INCLUDE, a widely consulted guideline has been developed connecting gender equality and social inclusion. It outlines the approach and concrete steps to mainstream both gender and social inclusion throughout the program and stresses differentiated assessments and analysis of barriers and benefits for target groups by sex, age group, ethnicity and income quintile at all stages of the program.

Sources: Interview GIZ Nepal, GESI guideline

The regional African Cashew initiative (ACi), implemented in five pilot countries (Mozambique, Ghana, Burkina Faso, Cote d'Ivoire and Benin) by GIZ on behalf of the German Government is funded by the Bill & Melinda Gates Foundation. It aims to strengthen global competitiveness of cashew production and processing (GIZ 2010).

Instrument. In 2009 the ACi, in cooperation with the GIZ Program Millennium Goals and Poverty Reduction (PMA) conducted an ex-ante PIA that integrates gender comprehensively. It identifies the need for a strong gender focus, existing gaps in terms of data, issues to be taken into account, monitored or looked deeper into.

Result. As a result the ACi has applied a clear emphasis on gender mainstreaming at all levels of the VC, including a gendered mapping of the VC. Additionally, a focus was set on income diversification (e.g. nursery management and beekeeping) and opportunities for rural women. It has also emphasised disaggregated (quantitative) data collection and in addition conducted a qualitative gender survey in the program. This additional qualitative data allows the assessment of the gendered situation and progress at household, farm, community and processing plant level. The survey was conducted internally with semi-structured interviews based on pre-elaborated questionnaires.

It has revealed important differences between countries, e.g. on intra-household decision-making and power relations. In Ghana, women have more say and often take decision jointly with their husbands or even alone, whereas in Burkina Faso women are sometimes asked but men take the final decision. The findings also confirm all assumptions that women feel empowered economically, they spend the income on education, health and the well being of the family.

The ACi aims at 5,500 additional jobs in processing, 70 per cent of which women in 2019. It has in 2014 already created 3,100 new jobs in processing factories, 74 per cent of those for women.

Sources: GIZ 2010, PPT of the program

2.1.2 Issue: (quality of) information on gender-related distributional impacts of trade in assessments and diagnostics

When trade diagnostics or (ex-ante) impact assessments are conducted, gender has to be integrated and reflected comprehensively. Key word searches in trade-related studies and assessments often return very few results, indicating that, if at all, differentiated questions on gender equality have been frequently covered only superficially – possibly 'to tick that box, too'.

Meaningful assessments would have to answer differentiated questions around how many men and women work in the sector, at which occupational level and under which working conditions, who will benefit within expanding or potentially shrinking sectors due to increased imports, who are users of trade-related facilities, who faces which barriers, underlying gender patterns that impede equal benefit etc.

Assessments required within the framework of TAs, such as the DTIS for the EIF (see more in the following) and the Sustainability Impact Assessments (SIA) for Economic Partnership Agreements (EPAs) of the EC integrate gender to a certain extent. Besides the fact that guidelines and formats however are often incongruent in relation to gender (see approach for the example of the DTIS action matrix), the **quality of the actual integration and reflection of gender** in the assessments is an issue. The research has not only revealed superficial reflection of gender in many cases but also a missing integration and reflection of these results in the actual recommendations and/or a complete reversion to undifferentiated categories of producers, entrepreneurs, workers etc..

Approach: Assistance by development partners to gender in assessments

Quality of the applied gender orientation within impact assessment is therefore key. The following example shows that development partners can assist importantly in getting the gender dimension right for trade and TAs in a country. At the same time, however, national trade institutions need to own the process and really subscribe to such differentiated analysis' with a focus on social inclusion and inclusive growth.

The Lao PDR DTIS, which outlines the results framework for trade (update, April 2012), reflects gender comprehensively. It was developed within the Enhanced Integrated Framework (EIF) Tier 1 Project. The diagnostic study confirms mentioned gendered occupational patterns: In Lao, PDR, women mostly work in manufacturing, agriculture and services.

The DTIS highlights female intensity and percentages of female labour in key exports and details poverty and gender impacts for sectors and key export sectors, analysing possible gains and losses. It has largely benefited from sections of a World Bank's Gender Action Plan funded research. (See Fontana 2012 for more details)

Without doubt, diagnostics or assessments add complexity to the process of trade negotiations and the development of TAs and RTAs. Nonetheless, concrete knowledge about gender-differentiated distributional impacts of trade is a pre-requisite to arrive at more inclusive trade openness and capitalise existing business opportunities. The importance becomes even more apparent when taking into account that diagnostics and assessments largely determine preferential and additional technical assistance as part of the transitional period before a trade agreement comes into full effect.

As they can ultimately determine the effectiveness and gender impact of AfT, they should be a core interest of development partners - e.g., subsequent EIF programs are based on the DTIS and national plans.

Pooled resources of development partners for such assessments, if not already covered by a trust fund, e.g. as part of the EIF, can finance larger scope ex-ante impact analysis'. These can then provide relevant information on social distributional effects of trade for the government, private sector, and development partners at the same time. And development partners and governments can use them jointly to identify relevant AfT.

Another quality-related dimension are provisions for such assessments, e.g. templates and guidelines for the DTIS in the framework of the EIF. Already

in 2006, as part of efforts around the AfT initiative, which was tasked to take 'full account of the gender perspective', 'harmonization of efforts on crosscutting issues, such as gender', was voiced within the AfT Task Force (Hassanali 2011).

Following recommendations of expert roundtable on gender in the EIF, the DTIS template was revised in 2009 to better reflect gender equality in its framework. However, the DTIS consists of an analytical report and an action matrix, used by LDCs, to e.g. identify initiatives for donor funding. The action matrix however was not revised and does therefore not necessarily include gender specifically, representing a gap in the translation from the analysis into relevant recommendations, as has also been observed as a practice within some EC SIAs.

This should be addressed, as Hassanali recommends, e.g. **with an additional column, related to gender equality in the DTIS action matrix**. Overall, in all assessments, gender results, barriers and mitigation approaches need to be reflected in the (mostly policy-related) recommendations. Likewise, any guideline on the development of such diagnostics and assessments, e.g. the EIF guidelines on the DTIS, should be clear about the level of detail and depth, on key questions and possible indicators.

2.1.3 Issue: gender as a topic is absent in trade negotiations

Trade negotiations focus around economic topics and largely leave out social issues and gender. Issues such as environmental, gender- and poverty-differentiated distributional effects of trade are not yet really integrated as crosscutting issues in TAs and negotiation processes. Viewed from the developmental perspective, integration of poverty, gender, and environment however actually converts into a business perspective for government, due to the costs incurred.

Consultation of relevant stakeholders for gender issues, including women, would happen in the case of ex-ante impact assessments or diagnostics.

However, within specific negotiations of TAs/ RTAs women are not sufficiently included and consulted. Researchers and NGOs call for inclusion of women in negotiation processes (Fontana 2009).

Additionally, negotiations, which involve large numbers of public and private partners, are prone to reproduce existing inequalities at decision-making level, as women are often underrepresented at higher and management level in politics as well as in business.

Approach: include gender in negotiations, women in consultations

Trade negotiations are extremely complex processes, focus mainly on economical and technical aspects and involve a large number of stakeholders. Ex-ante identified gender dimensions relevant for trade (and vice versa), should however facilitate the integration of the topic in negotiations and relevant structures and processes. A role development partner can take on is to lobby for the inclusion of more social dimensions to arrive at inclusive growth.

Considering the strong impact TAs/RTAs have on national policy and business structures, **women and gender experts should be included in trade negotiations and prior consultations** in order to mainstream gender perspectives into the agreements. Negotiators as such also need to be a) aware of the importance of the social dimensions and gender, b) possess some expertise. Therefore, training on the relationship of gender and trade and how to include it should be facilitated - or negotiators should be provided with relevant knowledge, e.g. through a short write-up, analysis of the issues and how it should be discussed and integrated within the framework of the respective TA/RTA.

As done with environmental issues, **gender issues can –and are, increasingly– being dealt with in agreements that accompany the TA/RTA**. Examples being the North American and the Canada-Chile Agreement on Labour Cooperation, both pressing for promotion of activities relating to equality in the workplace, elimination of discrimination in employment and equal pay (UNCTAD 2009).

Gender and the issue of gendered distributional effects of trade has to find their way onto **agendas of reviews and discussion rounds at relevant institutions, e.g. commissions created with the TAs**. A review of gender issues of concern to the United States, Canada, and Mexico has for example been regularly included in agendas of annual trilateral North American Free Trade Agreement commission

meetings (MacLaren 2012). Sporadic deliberate efforts to engender trade and export strategies can be observed – such as the engendered National Export Strategy (NES) of Uganda, revised with support from ITC in 2008 based on the recognition of women’s role in the economy (40% of privately owned company’s are owned by women) (ITC 2009).

Public private dialogues connect different actors within the trade liberalisation process and are therefore important entry points, as the following example shows, to inform policy level, reform projects and trade negotiations.

Practice example: Public Private Dialogues (PPDs) and policy input

PPDs are meetings between private and public actors, aiming at public-private networking and joint problem solving within a sector and on specific trade-related topics.

In Nepal, as part of the German-Nepalese Inclusive Development of the Economy, implemented by GIZ, gender is included in mainly sector specific PPDs. They have been established as mechanisms for multi-stakeholder discussions about the need for government and business to take collective actions in the context of Nepal’s accession to the WTO and implementation of the Nepal Trade Integration Strategy (NTIS). Gender-relevant topics find their way onto the agenda and the active participation of women is promoted in the PPDs. Women’s organizations are invited if present in the sector. Private sector associations are actively encouraged to include their female members as a mandatory requirement.

The PPDs in Nepal also inform the policy level: a short action plan for three identified areas of change with follow-ups is drawn after each PPD. Furthermore, policy recommendations are formulated and passed on to the public-private business forum, Nepal Business Forum, e.g. development of an Organic Farming legislation and creation of a governing body.

Source: Interview GIZ Nepal

2.2 Gender dimensions – trade facilitation

Trade facilitation commitments as part of AfT have increased by an astounding 365 per cent in comparison to the 2002-05 baseline, largely benefiting Africa. 44 per cent of the trade facilitation commitments were provided in regional trade facilitation programs in 2011 (OECD/WTO 2013).

Trade facilitation is defined by the WTO ‘as simplification and harmonisation of international trade procedures. Trade procedures include the activities, practices and formalities involved in collecting, presenting, communicating and processing data and other information required for the movement of goods in international trade.’

Trade facilitation and logistics initiatives focus on measures to reduce the typically high transaction costs of trading across borders. They seek to improve trade-related procedures such as customs and border management, licensing procedures, trade infrastructure, port efficiency, transport security, logistics and transport services, regional trade corridors and transit and multimodal transport. Trade facilitation is therefore also largely related to important framework conditions for (global, regional and national) VCs.

Customs and border management reforms seek to eradicate out-dated and bureaucratic border clearance processes, make customs procedures faster and more efficient. Informal traders, men and women, often seek to avoid highly priced customs duties but also processing fees for customs clearance. This is particularly the case if reduced documentary requirements for goods below a certain value, e.g. 500 or 200USD, are absent or processing fees only slightly lower than the transported value. Non-tariff barriers, e.g. ‘facilitation payments’ at checkpoints and during clearance procedures are other relevant factors.

The following gender-relevant issues apply in relation to trade facilitation:

- The vast majority of informal cross-border traders are women (e.g. 70% in SADC).
- Women face higher levels of harassment (corruption, sexual harassment, abuses) and longer waiting times at borders than men and are therefore more likely to avoid official border crossings.
- Long waiting times increase health risks, the likelihood of prostitution in border areas and transport hubs and increased spread of STD’s and HIV and AIDS.
- Due to their lower literacy levels, women might find it more difficult to move to paperless customs clearance processes etc.

2.2.1 Issue: harassment of women at borders and customs

Women are particularly vulnerable to malpractices at borders, evidence suggests. Low levels of literacy and lack of information on regulations and procedures in place increases their vulnerability to corruption and bribery and the risk of confiscation of goods (Higgins 2012b). They face higher levels of harassment and gender-based violence and have to wait longer than men (data from India indicates women wait 37 per cent longer to see the same customs official, ODI 2010a).

Women therefore often try to evade these difficulties by taking illegal routes. Informality in this context thus has a female face: UNIFEM estimated in 2009 that women and youth cover 70 per cent of informal cross-border trade in Sub-Saharan Africa, in Western and Central Africa around 60 per cent (AfDB 2012). It puts them at great risk, as illegal border trade is an offence and can lead to imprisonment and fines or expose them to coercion methods by border officials.

Economically, informal trade plays a key role in some developing countries’ exports: 49 per cent of Uganda’s export earnings in 2009 were from informal exports, estimated at USD1.56billion that year, in Burundi it accounts for 39 per cent of the countries GDP (ITC 2013a). However, informal trade also results in considerable loss of government revenues, hence the interest in simplified procedures.

While research on women informal cross-border traders (WICBTs) has considerably increased in

the past years, disaggregated data is still lacking, indicating their contribution to informal trade in terms of trade volumes - an important research area to be covered in the future.

Approach: simplified procedures – single window approaches targeted at women

Simplified and harmonised border clearance and customs processes are inherent to trade facilitation. One-stop shops, hubs or ‘single window’ approaches provide one entrance for traders in order to complete formalities that involve several entities, e.g. customs, health department, transport authority etc. They can be either a physical infrastructure or digitalised – or a combination of both.

One-stop shops can integrate specific services targeted at female businesswomen, traders, WICBTs. These can include supporting guidelines or staff to complete the formal procedures, especially in case of low literacy levels. They can also provide various features at once: reduced documentary requirements, support to complete the formalities, business training, advice and general information.

Practice example: WICBTs set up trade hubs at border crossings

WICBTs lack access to information on regulations and capacities. ITC supported the WICBT with training, providing information in the EAC and South Sudan.

Results. WICBTs learned as part of a training in Burundi that most of their exports are not subject to tariffs and duties and that they only need to fill a simplified EAC certificate of origin to clear goods of less than 2,000USD in value. More than 340 women were trained and around 8,000 women have become part of self-help groups. WICBTs have joined or formed women trade associations. These in turn are setting up trade hubs at several border crossings with free access to services for members of an association. The hubs offer training, advice on export business issues, provide information on investment and growth opportunities and advocate for a reduction of non-tariff barriers affecting their business.

Source: ITC 2013

2.2.2 Issue: access to information

Both men and women face problem in accessing information on their duties and rights in relation to cross-border trade due to the rent-seeking mentality of border officials. However, women seem to be particularly affected. WICBTs are often not aware of changed practices and regulations (see practice example above), which actually exempt them from customs. As a consequence, WICBTs remain reluctant to shift to ‘formal’ trade, even if trade openness and regional integration reforms are to their advantage.

Approach: facilitating access to information and increasing transparency

Information around customs and border management reforms needs to be widespread and targeted to different groups, e.g. to WICBTs and business owners. Choosing the right mix of formats and information channels for different target groups with a particular emphasis on women due to their high involvement in informal trade is therefore key.

Public private dialogues, an instrument widely used in trade-related programs at GIZ, offer opportunities to facilitate relevant information to a wide range of actors, including targeted to women.

Practice example: PPD facilitates exchange between public customs administration and female business owners on customs

PPDs are meetings or conferences held between private and public actors, aiming at public-private networking and joint problem solving within a sector and on specific trade-related topics

Addressing trade-related obstacles for women. Business owners in Senegal face non-tariff barriers affecting their business. Due to its geographical location, placing The Gambia in the middle of its northern and southern territory, high tariffs, customs and inefficient border customs management affect trade, resulting in losses amounting to millions of Euro. Businesses in Senegal, especially female-owned, have faced costly administrative challenges.

A female-owned cosmetics producer, sourcing Shea butter for her production from some 700km

away had to –illegitimately- pay high charges to release her raw material from checkpoints when administrative officials claimed customs to be paid. A receipt was never issued. Due to the delicate nature of Shea butter, whose quality is quickly affected by hot temperatures, the businesswoman has no alternative but to pay.

Approach. Information about customs regulations in place and access to related information among businesswomen in Senegal is low. In addition to this, the women, no matter their educational level, find themselves in a vulnerable position before administrative officials at checkpoints or borders. To address this and in order to bring the challenges women face to the attention of the public administration, the GIZ program Promoting the competitiveness and growth of small and medium-sized enterprises and capacity development in the microfinance sector in Senegal, on behalf of BMZ, facilitated an information exchange between high-level customs administration officials and businesswomen as part of a PPD. In Senegal, PPDs supported by GIZ are implemented at national, regional or sector level.

Results. The PPD has increased awareness on hurdles women face in business within the public administration, as they were brought together with the director of the Senegalese customs administration. The director provided the businesswomen with information on customs procedures they were unaware of, underlining, that no payments are required at checkpoints and the illegality of such requests. The businesswomen are now also aware of a national hotline providing customs relevant information. The appointment of a high-level official as focal point for the businesswomen they should inform when facing problems created a complaints mechanism.

Source: Interview GIZ Senegal.

Non-tariff barriers impede smooth trade and increase trading costs. Women are particularly vulnerable to such harassment, including sexual and physical. Approaches that increase transparency and provide tools for advocacy based on actual information on the extent of such malpractices are therefore key. When working with new technologies, possible differences in access and use of men and women have to be taken into account in the approach as well. In Nigeria a study revealed wide use and coverage.

Practice example: Visualizing trade route incidents crowd-fed by traders – TRIMS

The Trade Route Incidence Mapping System – TRIMS is a pilot of the German-Nigerian program Pro-Poor Growth and Promotion of Employment (SEDIN), implemented by GIZ in Nigeria on behalf of the German Government, BMZ. It seeks to facilitate trade by combatting trade corruption on trade routes and border crossings in the state of Ogun, bordering Benin.

Gender dimension. Bribes and harassment particularly affect poor traders, of which women constitute a large part.

Approach. TRIMS collects crowd-sourced anonymous data on requests for unofficial payments submitted by the businessperson or traders approached. The data, submitted via mobile phones in a structured and free SMS is mapped and traced in a geographical mapping system online. It therefore marks trade route incidents for the public almost in real time. The pilot, implemented through a multi-stakeholder consortium, has developed a targeted sensitization campaign for traders, community members, and the general public.

As the user submits a structured message containing the location, entity involved, bribe paid or sexual or physical harassment suffered, time delay, commodity traded and the sex of the trader as well, the statistics will be able to tell whether women and men are differently affected.

Source: TRIMS Info Sheet, GIZ 2013.



2.3 Gender dimensions and approaches – value chain development for export promotion

The ultimate goal of value chain development is to increase the competitiveness of the producers and the product. FTAs/RTAs and trade facilitation change markets and export opportunities and increase competition. They demand adjustments in production patterns and operations related to (export) products in order to compete in the market.

Value chain development is a relevant instrument to extend or improve business operations and competitiveness and generate economic and social benefits. Besides production patterns it also concerns the contractual relationships among the different actors involved, the flow of knowledge and information and innovation, to gradually add value to products and services, as they pass from one functional node to the next (UNIDO 2011).

VCs are often considered part of PSD. However, trade and PSD activities interact closely, often with unclear distinctions. Various PSD programs target or include exporting SMEs or VC-development of goods and services for export. They aim at influencing the relevant business (pre)conditions for trade, and thus also trade agreements, to work.

Within trade literature, value chain development mainly relates to linking value chains to global value and supply chains⁸. The point of departure is therefore an already fairly high degree of competitiveness within a sector or a value chain. The same applies within the trade liberalisation agenda: as sectors with comparative advantages will mainly be able to access new (export) markets, value chain development is likely to yield better results with products or services that already exhibit a certain degree of competitiveness, quality and/or compliance with standards.

A general problem for VC development in trade liberalisation is the fact that sectors relevant for the poor, in particular for women, are not necessarily those benefiting from trade openness. Their products might simply not be able to meet or to adapt to the

necessary standards and/or produce the volumes actually required within global supply chains - but rather produce for the local and national market. This is mainly the case for the large number of women involved in agriculture in developing countries and cuts across all continents.

Development cooperation and trade-related programs however might decide, based on a sound analysis, that lower product- and trade volumes and small(er) profit margins still matter for development and possibly rather the local, national or regional market. This is likely to apply within specific geographical areas suffering from either post-conflict situations or poor infrastructure and for certain (target) groups. Women might in this case be specifically targeted, as they constitute the majority of the poor. Creating and strengthening cooperatives for (female) smallholder farmers are one important PSD approach to counterweigh small individual volumes.

Creating trade opportunities within traditionally weak geographical areas and sectors becomes increasingly important for border regions and countries with high labour migration. Migration affects men disproportionately in some regions, e.g. across Central Asia, and might require either a specific focus on women (increasing number of female headed households) or specifically for men - if the trade opportunities could outweigh perceived migration opportunities. A gender approach in trade is not exclusively about women in trade, even though existing disparities indeed determine a strong focus on the advancement of women in order to close existing gender gaps.

The global rise in technical regulations and (social, environmental and health related) voluntary standards has added another layer of complexity to export promotion. Voluntary standards, determining certain sets of rules producers have to comply with, mainly in the area of procedures of production (e.g. organic) and working conditions, can on the one hand create new markets, on the other hand also potential additional trade barriers (thus limiting access to markets for producers, (M)SMEs and larger companies). Standards emphasizing social and environmental outcomes however often relate to newly created markets with a special significance for countries in development, smallholder farmers,

⁸ The difference between a value chain and a supply chain is mainly the angle of analysis: while value chains relate to the production process and the producers, supply chains take the viewpoint from industries and businesses – where to get the relevant products or inputs for business (supply).

cooperatives and women. In the past, these markets have rather been specialized and niche markets – however, increased demand for certification by consumers changes the pattern and creates new opportunities for producers in developing countries.

The following gender-relevant issues apply in relation to FTA and RTAs and trade policy:

- Different roles and positions in a value chain (women usually located at lower levels and functional nodes) – e.g., time constraints and restrictions in movement impede entering trading as an advanced and more lucrative position in the VC.
- Lower literacy level and limited access to further skills development (also due to do time-constraints).
- Limited access to inputs and productive assets including access to finance.
- Limited business development services – either not targeted or difficulties in accessing existing services.

2.3.1 Issue: knowledge about women's role and position in a VC and barriers they face in advancing

Gendered aspects in VCs relate to the fact that women usually participate in lower functional nodes of the value chains and at lower occupational level than men. They are therefore often not involved in the more lucrative nodes, where value addition happens.

Often, the positioning of the women and the factors that impede them to advance in the chain are not identified and require a gendered analysis in order to be able to either mainstream gender in the VC approach or explicitly address the outcoming issues.

Approach: mapping and analysing women's roles in VCs and barriers

Gendered value chain analysis helps linking the macro and the micro level and to illustrate inequalities in the chain such as gender disparity in the value of different parts of the process. As value chain governance determines the distribution of revenues from the traded product along VC, policies and interventions that influence the governance of the chain should take women's positions into

consideration and enhance their access to information about revenue distribution, capacity to negotiate their share and opportunities to chose partners/suppliers within the different nodes, in order to claim a greater share in the end sale price.

A **gendered value chain mapping** provides comprehensive insight into gender-relevant issues, e.g. who works at which level/functional node (men, women), what are the visible and invisible contributions? Who contributes with other products or services to the different nodes? Where are (and what kind of) visible/invisible blockages that impede women from advancing in the VC? Where are additional/niche markets?, etc..

Based on the mapping, important strategic decisions can be taken. A mapping exercise can be done for the overall chain, for one functional node or selected nodes, with a whole community/cooperative, workers or business owners. Mixing men and women can be very beneficial to increase awareness about gender in the value chain. See Fontana 2012: 26, von Hagen/Willems 2012: 62, Annex for examples of mappings and Mayoux 2008, Making the strongest link, ILO for more on the approach.

Other tools that can support a gendered analysis of a VC are:

- Time-use surveys, documenting the time spend over a day on different categories of tasks and work by men and women and
- Baselines, indicating involvement of men and women in the different tasks (contributing, producing, paid/unpaid, level, node). See practice example gemstone VC in Afghanistan on how a baseline can inform about a gendered production pattern and determine a gender approach.



2.3.2 Issue: barriers for women to advance in VCs or higher occupational levels

The barriers for women to advance to higher functional nodes in a VC or to positions with higher responsibilities are manifold and often rooted in gendered divisions of labour, gendered choices of professions and cultural perceptions of suitability for certain positions. Another important dimension however is skills development. Starting with lower educational levels of women, still the case in many developing countries, especially in rural areas, women later on lack access to training opportunities in order to improve within their actual occupation or advance in it. The lack of specific business skills also contributes to them remaining mainly in the production node in a VC and not necessarily advancing to further processing nodes.

Approach: skills development for women

Closing the gender gap in education is one approach, however, while working in trade, programs can support women in acquiring relevant skills for the specific sector. The need to do so stems from actual business needs (need for a skilled workforce) and increased competitiveness resulting from training, as the following two examples show.

Practice example: Advancing female garment workers through skills development training in the RMG industry in Bangladesh

The textile and ready-made garment (RMG) industry in Bangladesh, a key export sector of the country, is based on female employment: 80 per cent of the 3 million workers are women. RMG exports account for almost 80 per cent of the countries merchandise exports destined mainly at the markets of the USA and the EU and have reduced poverty rates at household level. Termination of the 1974 Multi-Fiber Agreement (MFA) in 2005, seen as a potential threat to the industry, has not resulted in a downturn of the sector. The Bangladeshi RMG and textile industry has though come increasingly under pressure to resolve and comply with social (including working conditions, workers rights etc.) and environmental issues as part of their production process.

The joint program Promotion of Social and Environmental Standards in the Readymade Garment Sector (PROGRESS) of the Government of Bangladesh and Germany, implemented by GIZ until 2010 and the subsequent program Promotion of Social and Environmental Standards in the Industry (PSES) recognized the importance to address gender issues and supports economic, social and legal empowerment of women and vulnerable groups.

Gender dimensions. Wage differences between men and women in the RMG sector in Bangladesh are pronounced: a female sewing machine operator earns around 71 per cent of a male's operators wage, a female helper around 53 per cent. Women, even though the majority of workers, occupy positions with low responsibility. They are vulnerable to job cuts with reduced demand and often lack adequate (technical) skills and access to relevant training – a fact playing against increased demand for additional supervisors in the industry, estimated at 25,000 in 2010.

Approach and results. Following an assessment of the situation and identifying the need for economic, social and legal empowerment of women, the program has supported **skills development programs of public and private training providers** with curricula and training concepts applying hands-on and work-based approaches.

The sector, due to increasing demand requires an estimated 150,000 new skilled operators per year and is confronted with difficulties in supply. A training programme, directed at disadvantaged youth between 18 and 25, provided technical and life skills training to 2000 young people, mainly women. Sustainability of the training is ensured as a local private organization has taken over the support of the training scheme from 2010.

Operators are trained in a deliberate approach to advance them from lower wage positions to, e.g. line supervisors - positions still predominantly held by men.

Through cell leaders trained in Labour Law, on gender equality and leadership skills, female garment workers are now able to access legal advice in the area of labour standards, working conditions, labour and family law. In two years around 2000 complaints have been addressed.

As part of post-training impact assessments trained female operators and supervisors have stated increases in their self-esteem and social status, e.g. respect from their family, also due to remittances sent to families in the countryside. The factory management on their part states higher quality, productivity and less absenteeism in the production line of female supervisors.

The women also confirm the often assumed relationship between increased income and higher level of autonomy and report positive influences on spending decisions and marital relationships.

Additionally, around 100 trained disabled, mostly female workers have all found jobs, their income has increased by 200 per cent and the good experiences are changing prevalent negative attitudes of employers. The results show that business interests can be gainfully combined with a social inclusion approach within a trade-relevant sector and increase productivity, competitiveness and address prevalent gendered roles and norms at the same time.

Sources: GIZ 2010, von Hagen/Willems 2012

In addition, approaches chosen on gender within trade are highly context-dependent. Pronounced inequalities in Afghanistan require specific, gender-segregated and innovative approaches to reach women, as the following example shows.

Practice example: Access to skills development for women in the gemstone jewellery value chain in Afghanistan

In Northern Afghanistan, GIZ provides support to a number of economic areas and related VCs through its Sustainable Economic Development Program. On behalf of GIZ, GFA Consulting Group promotes gem cutting and jewellery for small-scale artisans in four provinces (Balkh, Kunduz, Takhar, Badakhshan) focusing on the rehabilitation of mines and capacity building for jewellers in both processing and business management.

Gender dimensions. Economic empowerment of women in Afghanistan is complex and requires a gender-segregated approach, e.g. by sensitively

supporting women's participation, establishing structures exclusively for women and connecting them with other women. Prevalent cultural and religious norms and the restricted movement for women in Afghanistan present great challenges for female entrepreneurs and in advancing them to more lucrative nodes within a value chain, e.g. to trading or marketing.

Men often dominate artisans' associations, important partners at the meso- and micro level for production and marketing. Only one of six gemstone/ jewellery associations in the program area is led by a woman. This association has mainly male members, but she also tries to advance sales of jewellery from women. The program has established close ties with her and the association.

Instruments. Analysis results determine focus on women in the gemstone VC.

A VC analysis was conducted at the beginning. Access to markets existed to a certain level through long-standing networks and relations to buyers, mainly from Central Asia and Pakistan. In the past however, mainly raw stones have been exported. Adding value through improved processing (cutting and polishing gems and/or design of jewellery) was identified as an important area for increased sales and income.

Further to the VC analysis and the programs' ex-ante gender analysis, an extensive **baseline study was conducted to collect disaggregated gender-relevant information** (how many men and women actually work in the sector(s) and how, composition of households involved in the program areas, time spend on work within the sector(s)).

The baseline revealed that even if, due to their restricted movements, women face limitations in participating in trading and marketing of gemstones and gemstone-jewellery, they are extensively involved in adding value in the VC through home-based polishing and design of gemstones for jewellery.

Based on the findings of the baseline study, a **gender approach focusing on capacity development for women** was developed and implemented in order to specifically address existing barriers in access to skills. This approach was chosen in addition to working with male gemstone polishers on quality in gemstone processing and design patterns.

Approach. Facilitating access to skills and knowledge for women. In order to increase the quality of polishing and designs for gemstone jewellery, the program established six training centres, equipped with machines for advanced production for use by members of the association against a small fee. Additionally, trainings on cutting, polishing, design, business planning and other topics were provided to both men and women.

Due to the cultural and religious restrictions in joining women and men as well as massive constraints in women's movement outside their homes, only 7 per cent of the more than 1200 participants of trainings and users of the centres' equipment were women. Even though joint and mainly family-based male and female production patterns of gemstones facilitate transmission of a certain level of knowledge to women through the men, the program **sought to actively counterbalance the particular lack of access to knowledge and skills development for women.**

Video tutorials on design and jewellery making techniques were developed, targeted at their work at home. The videos were transmitted directly to women with a TV screen and a small generator with further technical explanations in the villages. To ensure sustainability and use of the centres by women, some women underwent capacity building as trainers in a 6-months Training of Trainer in Jaipur, India.

It was originally planned to **establish separate hours of use of the training centres exclusively for women.** Unfortunately this was jeopardized by a deteriorating security situation in the intervention area that bound women further to their homes.

Results. Overall the program has worked with more than 5000 gem-cutters and jewellers, of which one third are women, mainly in home-based businesses. Further to that, knowledge and skills acquired have spread, as those trained have in turn trained other female household members.

An impact study conducted in 2014 has revealed that within the gemstone VC, improved processing has increased income and sales for the businesses by 47 per cent to 106,000 AFN (1900 USD) per year.

Additional jobs have been created, also for women, as on average, the number of employees increased per business from 2,7 (2,1 M; 0,6 F) to 5,2 (3,8 M; 1,4 F) - equivalent to a 43 per cent increase for women and 55 per cent for men.

The women have also voiced that, besides the fact that they indeed **control parts of the additional income from their work**, as expressed by women in focus group discussions, the **productive work has importantly improved their self-esteem, status within the family, the community and their relation to and esteem by men.**

Source: Interviews, GFA 2014, PPT

2.3.3 Issue: lack of access to finance and business development services

Women (although this data is very country specific) still own and manage fewer enterprises than men, especially in developing countries. Although usually part of PSD programs, this is a variable relevant for trade as well. Women's businesses grow slower and produce smaller profits and their discontinuance rate is higher (GEM). Setting up and sustaining successful enterprises (MSME) requires access to finance, a network, skills and business literacy - all factors where women face disadvantages. Credits, although also difficult to access for men due to their high (risk-related) interest within the banking sector, are almost impossible to access for women as collaterals, e.g. land or cattle, are often still registered only to the husband. Business development service structures, including associations, chambers, cooperatives etc. still have lower level of female membership. Often, women are not aware of their services either.

Approach: support access to finance for women

Whether business owners can access the necessary credits to sustain their businesses or grow is largely dependent on their credit history and security they can offer financial institutions providing credits. Building up credit histories – and supporting their comparability in a regional market, assists credit takers and women in particular.

Practice example: credit history and credit information exchange leads to improved access to finance for women – SADC

Germany supports the Southern African Development Community (SADC) in its overall integration process. Within the collaboration with SADC, implemented by GIZ, gender sensitivity and a comprehensive gender mainstreaming approach is applied. Gender is integrated into SADCs reform agenda, transboundary water management, good governance, peace and security and police support and economic trade policy capacities and performance. GIZ supports SADC in the implementation of its Protocol on Gender and Development (2008), aiming at economic empowerment of women, achieving gender equality through gender responsive policies, legislation, programs and projects.

Gender dimensions and instrument. Regional economic integration has been identified as one of three priority areas in 2013 between SADC and Germany. Access to finance is a major impediment to trade and regional economic integration, particularly affecting women. Lack of information and credit history increase risks for private sector credit providers and lead to overly high interest rates for credit takers – or no provision at all. Women face particular difficulties, as assets (land, property) are mainly registered in the husbands' name and can thus not be used as collateral. Business development and survival are dependent on access to finance and businesses too large for microcredits but too small for commercial banks face a particular problem, leading to a 'missing middle'.

Approach. The GIZ-SADC Promotion of Economic Integration and Trade Programme (ProSPECT) supports financial credit information practices where credit information sharing in the region is encouraged and credit users can build a credit history. This approach benefits regular paybacks and conscientious credit users - in many cases women, as several studies on microfinance have revealed. Harmonised regulations in the region are required in order to be able to compare the credit information and the risks attached.

Results. Data from the region shows a positive trend in improved access to finance, especially for women. In the longer term credit interests should decrease and access to credits increase, based on reliable and comparable credit information and history. Another positive effect are realistic credits, lowering the risk for excessive indebtedness.

Source: SADC factsheet, GIZ consultations

Provision of microfinance credit for women is a widely known (and also debated) intervention area within PSD in development cooperation. Remote areas with even lesser availability of financial institutions add a layer of complexity for women – a fact addressed by men in the following practice example.

Practice example: Community-based microcredits for rural trading in the border area of the AU

GIZ, on behalf of the German Foreign Office (AA), provides technical assistance to remote villages in the border area of Mali and Burkina Faso within the Support to the African Union Border Program. The program mainly aims at contributing to a regional reconciliation process through delimitation and demarcation of borders and related capacity development. The border area between the villages of Wanian in Mali and Ouarakuy in Burkina Faso suffered a border dispute in 2006, solved in a participatory conflict resolution process with support from GIZ.

Instrument. Local men request a microcredit kitty for women. As the primarily poor population of the very remote border area villages faces additional challenges, e.g. in access to health services, GIZ supported the establishment of a cross-border regional health centre. Additionally, GIZ provided a grant to establish community cereal banks in the villages with food security as the main objective. In the village of Wanian, the mainly **male dominated cereal bank committee of the community requested to split the grant for the cereal bank in order to additionally establish a microcredit kitty for women.** The request was supported by GIZ based on the observation that access to finance was difficult in the remote rural area, particularly disfavoring women, and that it could advance trade between the small community markets in the border area.

Approach. The microcredit kitty, self-managed by community members, provides microloans to more than 53 mainly female village-based neighborhood groups. Nonetheless, men can equally access microcredits through the kitty. Data however shows that **90% of the microcredits are increasing revenues of women** trading in mainly agriculture-based products within the local markets of the border area.

A female president directs the microcredit kitty. Due to very low female literacy levels in the area it is mainly managed by men with adequate literacy levels to keep necessary records of the loans.

Results. The microcredit kitty supports small-scale, micro-level border area trade at community level and within small village markets. Nonetheless, benefits for the community and women are notable and underline the relevance of trade in goods and structural issues (access to finance) for poverty reduction, especially for women.

The self-management of the kitty is effective: started in 2009 with a capital of 2 500 000FCFA (equivalent to 3.962EUR) **the funds available have doubled up-to-date** (7.014EUR, February 2013). Back payment rates with low interest rates are extremely high, as the neighborhood groups, thus creating social control, allocate specific needs-based amounts to the individual beneficiaries.

Personal expenditure on food, clothing, schooling of children and health services has risen, based on the increased revenues: Wanian, as opposed to other villages without a micro-credit kitty, has a higher frequency rate of the cross-border health centre by 23%. The health services are accessed by 26,4% women, 16% men and 47% of children under the age of 5 years old, accompanied by their mothers. The kitty has contributed to economic and social empowerment of women in a zone affected by conflict and socio-economic marginalization.

Sources: Interview, GIZ 2014.

Approach: strengthen women's participation in trade associations and/or support female trade associations

Membership in associations and/or cooperatives facilitates access to social and business networks for women. Specific female trade associations or cooperatives or specific services targeted at

women, addressing the main barriers they face, e.g. information on procedures, support in accessing fun. An important dimension to be reflected in approaches facilitating access of women to business associations and/or cooperatives is however also the additional time burden for women, e.g. through participation in meetings. These therefore should take into account limitations stemming from women's caring responsibilities and be scheduled accordingly.

Practice example: Targeted support for female entrepreneurs through the Afghani Chamber of Commerce and Industries (ACCI) - Afghanistan

The ACCI is the Afghan private sector association, recognized by the Government as the representative body of the private sector. The Sustainable Economic Development Program of the German Government, implemented on behalf of GIZ in Kabul and Northern Afghanistan supports the ACCI in its role and efforts as a meso-level body to advance economic development in the country.

Instrument. A survey on Gender, Entrepreneurship and Employment in Afghanistan, commissioned by the program in 2013 in order to gain differentiated insights into questions around economic development, revealed pronounced gender-based discrimination for female entrepreneurs in opportunities to open and develop their own business.

Reasons are discriminative practices in female inheritance, culturally and/or religiously determined restrictions of movement for women due to the traditionally primarily reproductive and caring tasks allocated to women within a family. As a consequence, even though men overall state the same obstacles, women face major difficulties in opening a business, accessing credits, markets and/or skills development for SMEs. 48 per cent of the female survey respondents state that the current business environment discriminates women (Merkel 2013: 15).

Women furthermore have less business development services targeted at them and they were not always aware of the support services available. Significant differences between men and women were found in the way their products are marketed, with women relying mainly on mouth-to-mouth information and men having

greater access to trade fairs and the use of leaflets and brochures. While the target markets for men and women did not differ much, besides the unsurprising fact that women's markets are primarily local and provincial, export markets only make up a tiny proportion (Merkel 2013: 12) – a potential to be reaped for both men and women, however ensuring equal opportunities and access to markets for women at the same time.

Approach. Strengthening business development services for women through a female entrepreneurs empowerment unit in the ACCI.

Following the analysis, the program has since spring 2013 supported the establishment of the Female Entrepreneurs Empowerment Unit – FEEU within the ACCI. Ownership for the FEEU within the chamber's management stems from their general interest to cater for and satisfy all their members. The main tasks of the FEEU cover:

- Guaranteeing equal access to ACCI services;
- Provision of skills-development for female entrepreneurs;
- The establishment of a political representation of interests for women at national and regional level;
- The creation of a nationwide network for female entrepreneurs to facilitate exchange of experiences and cooperation.

Results. The ACCI has, as part of the support, established regular networking mechanisms of 65 women in Kabul and Mazar-e-Sharif and provided skills-development courses in the area of business management. Furthermore, roundtables on access to finances have led to a MoU with a number of banks, which seeks to initiate improved conditions for credits specifically for women. The challenges for female led businesses were discussed by 350 participants of a public-private dialogue as part of the first conference of female entrepreneurs.

The biggest achievement however is that within a year of its establishment, 76 per cent of the female ACCI members feel their interests represented through the ACCI; an increase of 19 per cent to levels surveyed a year earlier.

Sources: Merkel 2013, program documents

2.3.3 Issue: Access to export markets

(M)SMEs overall, and female owned in particular, face difficulties in accessing newly emerged export

markets, thus limiting potential export growth. They often have less knowledge about actual (new) market opportunities, also due to lower levels of membership in relevant trade associations or chambers of commerce.

Approach: Linkages to export markets

Linking producers to export markets, especially if newly emerging with TAs/RTAs, yields great results. One important instrument are trade fairs, however, information on standards and regulations applicable in those (new) markets are equally important as a prerequisite for adaptation of the products and the ultimately access.

Disaggregated monitoring data of support provided by GIZ to the CARIFORUM EPA shows that linking (female) business owners and entrepreneurs directly with buyers at trade fairs has had substantial impact across a number of sectors.

Practice example: Trade fairs as a tool to establish a link and access to export markets

The objective of the EPA Implementation Support Project within the CARIFORUM region, implemented by GIZ on behalf of BMZ is that 'relevant regional and national organisations contribute significantly to a development-friendly implementation of the CARIFORUM-EC EPA. In light of the objective an import sub-component indicator is that 'at least three new export promotion instruments targeted at improved market access opportunities arising from the EPA, particularly of products which **foster the participation of women in economic processes**, are applied by relevant associations for the promotion of the private sector'. The instruments supported by the project were Trade Fairs, Institutional Capacity Development and Human Capacity Development.

Gender dimensions. Within the framework of the project with its stakeholders in the region at different levels it has been observed that women play quite an active role in economic processes in the region, also at higher management level and as business owners. Their male counterparts are actually less likely to be engaged in economic activity. Within the region therefore it might in the future also be necessary to actively support men. Nonetheless, occupational segregation leading to the concentration of men and women in specific sectors also applies, e.g. in more technical sectors,

TRADE FAIRS	
The Gallery, Berlin – fashion	Key results
5 CARIFORUM firms 100% female owned. Female staff participation rate: 4 of 5 firms of at least 50% or greater.	<ul style="list-style-type: none"> • Three signed contracts, total value at 3,324.80USD, international media exposure • Networking (at least 26 business and media contacts made) • Increased private sector expertise on sector requirements for the EU and German markets
ANUGA, Cologne – Food	Key results
36% (4 of 11) beneficiaries were female and 64% (7) male (owners or senior managerial position). Female staff participation rate: 64% (7 of 11) beneficiary firms of at least 50% or greater.	<ul style="list-style-type: none"> • At least 11 total orders requested by international buyers from 6 of the 11 CARIFORUM exhibitors • Around 500 business contacts between EU business representatives and the 11 CARIFORUM companies (specialty stores, retailers, distributors etc.) • Samples requested and provided by exhibitors to EU and German companies • All 11 exhibitors confirmed new opportunities through the event, 8 of the 11 confirmed their export development needs were met through the initiative
CARIFESTA, Surinam – Arts	Key results
20 individual CARIFORUM beneficiary artists: 50% male and female respectively (dancers, musicians, singers, instrumentalists)	<ul style="list-style-type: none"> • Increased knowledge of international industry representatives about Caribbean artistes • Demo-CD distribution to int. industry representatives by Caribbean artistes • Networking: Caribbean artistes as well as with international industry representatives • CARICOM Secretariat: advice on the organization of festivals
CeBIT, Hannover – IT	Key results
6 CARIFORUM beneficiary firms, 5 owned by males. Female staff participation rate: 2 of 6 firms of at least 50% or greater. 2 firms 25% to 49%. 2 firms less than 25% women.	<ul style="list-style-type: none"> • Verbal agreement: future cooperation with German BSO ‘House of IT’ • Networking: at least 100 ICT business contacts made overall • Improved expertise of 6 CARIFORUM ICT SMEs on key international/EU industry trends and regulatory issues • 6 CARIFORUM SMEs provided with crucial services not previously available for seizing market access opportunities from the EPA

such as IT. The monitoring information gathered (years 2012-2014) reflects that the GIZ EPA CARIFORUM project has contributed to closing existing gender gaps overall. The following table shows concrete results of linking (female) exporters to new EPA markets.

Source: program compilation, GIZ

The following example of ITCs efforts to tap new trade opportunities in Kenya and Uganda in linking mainly female micro producers with the international fashion market shows that **development cooperation can contribute to larger-scale integration of ‘supply’ into a global value chain.** And that this includes micro producers. Institutional capacities, in this example of the intermediary social enterprise, in addition to market linkages and an improving business environment are of paramount importance to make the efforts sustainable.

Practice example: 'No charity, just work' – Linking poor African communities with the international fashion industry

The fashion industry employs around 60 million people globally, in the majority women and unskilled workers. Increased scrutiny of the industry by consumers based on concerns around labour and environmental impacts in fashion production has created a market shift and new trade opportunities. The Poor Communities and Trade Program (PCTP) of the International Trade Centre (ITC) used these for African micro-manufacturers within its project the Ethical Fashion Initiative.

Approach. Poor and marginalised rural and urban communities in Kenya and Uganda with no prior access to export markets and global supply chains were linked to international fashion companies. The majority of these (formal and informal) micro-producers are women. The approach contributes to poverty alleviation, gender equality and promotes environmentally friendly production processes, using mostly recycled and/or organic locally sourced materials.

The aim is 'to convert mainstream fashion into a more ethical endeavour', not to establish niche

markets for 'ethnic fashion' from Africa. The program, working with a social enterprise in Africa as intermediary, has involved several internationally renowned fashion designers with the communities, including Vivienne Westwood. ITC provides technical assistance and links (potential) buyers, thus facilitating demand and supply.

Results. Over 7,000 women have gained employment, receiving fair pay, equal to around double the minimum wage in Kenya and have improved their livelihoods substantially. In an impact assessment, conducted in 2010, 88 per cent of the respondents mention 'their ability to make independent financial decisions as the most important change in life', 94 per cent 'are more confident with themselves' and the whole of the Maasai community interviewed referred to increased respect from their male counterparts, especially husbands for their ability to earn a living, take care of their families and restock their animals. (Text adapted from von Hagen/Willems 2012, using ITC 2011, ICT 2011a)





3 Measuring gender in trade

Governments and multilateral institutions providing development assistance have in the past decade -and even more so with the recent global economic crisis- increasingly come under pressure from their parliaments and the public to demonstrate results of the public resources invested. Results-based monitoring and evaluation of development measures are invaluable tools to produce evidence for results achieved. Following the Paris Declaration and the aid effectiveness agenda, strengthening M&E for trade results, including information on gender effects of trade, should also be strengthened within the partner systems.

Trade-related programs mainly focus on trade outcomes, measuring quantitative economic results, changes in processes and regulations or capacity-related indicators. To steer trade liberalisation towards inclusive growth and to

prevent and address existing gender inequalities for **better and more inclusive trade outcomes, gender (and poverty) related information has to be monitored and analysed by trade programs.**

In order to reflect gender adequately in trade-related interventions, **a shift from “gender-neutral” categories such as producers and entrepreneurs to further differentiation is required. The disaggregation by sex of quantitative and qualitative data collected, e.g. x no. of female/male owned (M)SMEs, x% of females/males affirming improvements in access to x etc., is the minimum requirement and should happen by default** in trade or PSD programs as well as related analysis, impact assessments and the presentation of achieved results. The data should be further disaggregated by:

- geographical location – to answer where the ones that benefit or don't are located – rural, urban, certain areas?
- poverty levels – to further unpack the categories of male and female to answer who really benefits or is possibly left behind.
- ethnicity – to ensure non-discrimination, to analyse whether certain groups are left out.
- age groups – to determine who participates, who doesn't. Are the old or middle-aged being left behind? Do young people enter new markets/opportunities? Who are the entrepreneurs (young/old, urban/rural etc.)?

The necessity for such disaggregation stems from the simple fact that **monitoring is a management and steering tool**, providing necessary information for periodic analysis – thus allowing adjustments and mitigation of possible (unintended) negative impacts (on gender equality and/or certain groups). This analysis can lead to relevant input for the (trade) policy level in a country and the identification of areas where specific measures to advance women are required.

While this all may sound obvious, disaggregation by default is not yet common practice in all trade-related programs.

Additionally, the **type of data gathered** matters for the analysis. With a focus on mere economic variable, e.g. increase in income, relevant gender issues are not assessed: can the women indeed control it, do they feel empowered, what social attributes does it bring to them? Lack of data and analysis also inhibits the documentation of important gender results.

Underlying gender issues and the determining power relations often only evolve from an analysis of disaggregated data and if further questions are asked. Especially because each country context and the gendered economic and social roles differ, country and region-specific data is required to develop specific approaches to mitigate gender inequalities and contribute to gender equity. This includes a look at possibly necessary approaches working with men, as focusing on gender equality might challenge existing power relations.

The starting point for measuring gender in trade therefore is the **availability and collection of sex-disaggregated data**. A number of secondary statistical databases and/or relevant reports and studies exist, e.g. HDI, the WB databank, ILOs LABORSTA and Key Indicators of the Labour Market Database (KILM), UNCTADs population and labour force statistics, ITCs export database Trade Map or statistics from regional commissions (e.g. CEPAL or UNECA). Another important source are national statistics and census', such as household surveys. Data from social and poverty impact assessments, such as the mentioned PIA, PSIA, TDIS, are other important sources to use for monitoring gender outcomes and trade impacts on gender inequality patterns.

In general, multiple data sources have to be used for trade impact assessments (in relation to trade agreements) undertaken by governments, business entities, such as business associations and/or chambers of commerce or as part of a programs monitoring system.

In many instances trade-related development programs have to specifically survey and collect data within a certain sector or area and might therefore require additional primary data collection. Where possible and relevant, development partners should seek to pool resources, as mentioned under section 2.1.2, in order to be able to guarantee datasets with representative sample sizes and avoid duplication of efforts. If relevant indicators for the national assessment of gender-differentiated trade impacts are missing, National Statistics Offices, Ministries of Trade, Commerce and Industries and/or trade commissions (as part of trade agreements) or business associations should be supported to integrate them in their surveys.

Gender mainstreaming as a crosscutting issue

Gender is increasingly assigned with a gender mainstreaming approach as a crosscutting theme within development cooperation across sectors. In practice, this approach has led to gender mainstreaming as one of many crosscutting themes to be reflected, amongst them poverty, climate change, conflict, disabilities, drugs and others. Programs are therefore often overwhelmed, leading to insufficient consideration of gender throughout the measures - or to a mere attention to integration of female participants or an isolated indicator, if applicable.

Despite a growing number of gender focal points within organisations and programs, concrete sector relevant gender expertise is often still insufficient within program teams and partner institutions. It also has to be considered that national staff forms part of the gendered structures of their own societies – as do internationals in their own countries– and might therefore overlook existing disparities without any further analysis and/or training.

In sum, applying gender mainstreaming as a cross cutting theme without addressing gender-related capacity or reflecting gender specifically in indicators and/or monitoring systems in trade-related programs is therefore deemed insufficient to advance gender equality.

3.1 Gender in monitoring systems of trade-related programs

Quality control, disaggregation and defining relevant gender dimensions

Development programs usually operate on the basis of set indicators that measure progress and depict the actual results achieved. Whether the indicators include specific gender dimensions is set by the importance given to gender equality within the program design and the G-marker assigned. Quality control of program design and indicators across all sectors by gender specialists (with sectoral knowledge) should –and is increasingly becoming– common practice in development organisations, also for trade programs.

Gender marker – G 0-1-2

The G-marker is a policy tool of the OECD/DAC to measure the allocation of resources of development partners to the promotion of gender equality.

GIZ has applied G-markers since 2011 but has substantially refined them in 2005 – and herewith contributed to a further enhancement of the markers at OECD/DAC level (GIZ 2006).

The G-markers are part and parcel of GIZs overall framework for contracts

and cooperation: with the assessment for a future program, a gender analysis is conducted identifying areas to address gender equality within the specific results model and framework of the program. The degree and level of gender issues identified is included in the program design translated into indicators that undergo explicit internal quality control by gender specialists.

The G-markers are defined as:

G-2: Gender equality is one of the major objectives (OECD/DAC: principle objective) of the development measure.

G-1: The development measure has positive impacts (OECD/DAC: significant objective), but gender equality is not the main objective.

G-0: The development measure has no potential to advance the cause of gender equality (OECD/DAC: not targeted to the objective).

Most GIZ trade-related programs have a G-1 marker.

See GIZ 2006 for more information and examples.

In accordance with abovementioned minimum requirements, the monitoring system of a program has to **collect and enter data disaggregated by sex as part of their database and/or monitoring reports.**

The set of indicators developed for a program depend largely on the design and results model applied. Gender is usually reflected at varying level sometimes set at a high (objective) or sometimes very low (activity) level. Therefore it might be necessary to **formulate additional gender-related or disaggregated process or proxy indicators** as part of the monitoring system, in order to assess progress achieved (see the following section for indicators).

Indicator sheets and/or monitoring plans detail the various aspects of an indicator, including assumptions that are made, availability of data and calculation methods (identifying the nominator

and denominator) of different data. They determine the values and methods of the baseline and present an **opportunity to reflect and document gender-relevant aspects to be observed.**

If gender is integrated within a programs design, measures and monitoring system, an evaluation will automatically pick up gender-differentiated impacts of trade. Where this is not the case, gender still goes by the board, as relevant disaggregation of information might also not be available for a deeper analysis. Specific requirements to assess gender impacts should in any case be integrated into terms of reference for evaluations of trade programs.

Data collection methods

Set indicators and their means of verification largely define data collection for monitoring and evaluation. Quantitative data collection methods with systematic standardised approaches, as mentioned among the secondary sources above, are preferably used in trade programs. However, gendered dimensions usually require a mix of qualitative and quantitative information. For example, in order to find out if and how increased exports have impacted the lives and gendered roles of the target group (men and women), the increases in export (volumes), employment and wage gains are important. Yet, additional information on whether this has changed spending, self-esteem, social status and power relations of men and women is equally relevant to determine gendered effects of trade (see practice example of the African Cashew initiative for an addition of qualitative data through a gender survey).

Participatory qualitative data collection methods, to gather such information about changes but also needs, include:

- Focus Group discussions (if necessary due to cultural norms where women would feel more freely to express themselves or if easier to then contrast the results separate for women and men);
- Rapid assessments: systematic, semi-structured approach to contact few key people in a small number of locations;

- Livelihood assessments focusing on perceptions and behaviours (if not included in other surveys);
- Interviews: individual and/or with whole communities, structured or semi-structured;
- Documentation of cases and individual stories.

3.2 Gender-related indicators in trade

Indicators reflect the information required to assess and measure gender-differentiated impacts of trade. The set of indicators of a trade program usually depends on the countries priorities and trade agreements in place as well as the assistance requested. Another determining factor of indicators is the availability of data to measure the indicator, the means of verification or sources.

However, gender constraints have to be reflected in the program design. Outputs and outcomes and capacity development measures should be gender-related and disaggregated – which will assure gender in indicators and overall disaggregated information.

Overall, monitoring data needs to provide information on the social and economic situation of women in relation to men affected or influenced by trade. This should include information on costs and benefits of trade for men and women, establishing direct and indirect relationships of trade and gender. Changes can be established against a baseline.

Information collected on indicators or as part of monitoring systems requires thorough analysis. This includes combination of data, establishing relationships and looking at possible correlations of situational indicators. When doing so, the underlying assumptions in the interpretation of the data have to be clear (and cross-checked with other data, if available).

The following table provides an overview of the areas to be assessed and relevant indicators in relation to the trade-related instruments discussed in chapter 2⁹.

⁹ The table is extensive and deliberately presents a number of different, sometimes overlapping indicators as different options. Naturally, a trade program covers only some indicators. However, the collection is meant to also provide important input into areas to be monitored, e.g. with proxy indicators set by programs.

Table 2: Indicators to measure gender in trade

Key: (m/f) indicates disaggregation by men and women; (text in brackets) below indicators indicates possible additional calculations / interests
 All indicators can also be further disaggregated by income level, age groups, location and/ or ethnicity, if data availability allows.

It is important to note that the following list of indicators is not only meant as programme indicators but also includes a number of areas that should be monitored in order to be informed about the developments and gender differentiated impacts of trade.

Instrument	Category	Indicators	Means of verification	Key questions to ask
Policy / TFAs / RTAs	Analysis - Policy and strategy	Trade impact assessment / Trade diagnostic / PIA / PSIA/ DTIS for trade agreement x details gender-differentiated impacts (can include poverty and environmental impacts as well, depending on the scope)	Impact assessment, gender impact list and recommendations	Who will be most affected by impacts of trade (m/f), in which sectors/ industries, occupations, geographical areas? Who will benefit / lose out (m/f) and on what (employment, wages, working conditions, imports, possible decreased public spending)?
		Impact assessments apply revised guidelines / formats (e.g. DTIS action matrix)		
		Impact assessment / PIA results including gender-differentiated trade impacts integrated in discussions around TA/RTA/ trade negotiations	Agenda / minutes of discussions etc.	Are impact assessment results reflecting gender issues used by the relevant stakeholders and for trade negotiations, policy level etc.?
Trade impacts - Analysis		No. of workers by sector / occupation (m/f) Increase in m/f employment by sector/ occupation	Labour statistics, trade association / CoC statistics	Who benefits from increased employment in which export sector and occupation – men / women?
		Potential for job creation by sector/ occupation (m/f) (Difference between occupation levels for m/f)	Labour statistics, trade association / CoC statistics	Where is potential for job creation from expanding (export) sectors? Who benefits from newly created jobs? In which segment/ occupation are men and women located?
Negotia-tions		Trade negotiations include gender and poverty concerns and draft a paper with areas for inclusion	Agenda for negotiations, draft paper	Is gender included in trade negotiations? Are women consulted / represented?
		No of briefings/ inputs on gender dimensions in trade discussed as part of (preparation for) negotiations	Briefing papers, inputs on gender	Is gender integrated in discussions around TAs/RTAs?
		No of civil society / women's organizations / women leaders integrated in the trade dialogue with government (increase)	Records of dialogues / agendas / participants lists	Are women consulted so that their needs and perspectives can be taken into account?
		No. of women / organisations consulted for negotiations / participating in negotiations	Meeting records	Are women and women 's organisations consulted in trade negotiation processes?

Instrument	Category	Indicators	Means of verification	Key questions to ask
Policy / TFEAs / RTAs	Policy and TA/ RTA	Integration of social clauses relating to gender (and poverty) in policies / agreements / accompanying agreements	Policies or agreements	Are gender concerns / outcomes from impact assessments addressed in TA/RTAs?
		X gender-relevant issues are integrated in agreement x, accompanying TA x	Agreement x / Amendment	Where are gender-relevant issues reflected to
		Trade agreements / complementing documents to TAs differentiate between men, women, poor etc. / address gender as part of the document	TA, complementing documents	Are TAs and complementing documents reflecting gender? Use differentiated categories and language?
		No of reforms / accompanying documents reviewed to integrate trade-related gender concerns	Modified/ reviewed document	Are reforms or related documents being changed to reflect gender?
		Trade agreement x differentiates export sectors opportunities by gender	Trade agreement	Do trade agreements reflect differentiation of sectors based on opportunities for men and women?
		Export strategy includes gender / differentiation of opportunities in export sectors by m/f, employment opportunities (m/f), assessments of expansion or contraction of female or male intensive sectors	Export strategy	Do export strategies or other trade related strategies distinguish
		Trade action matrix / trade policy / implementation plan reviewed to include gender and pro-poor issues	Documents	Are existing policy and implementation documents reviewed and adapted to accommodate gender concerns?
		A sector strategy is participatory developed and takes into account x gender and poverty impacts / addresses constraints faced by women	Records of meetings of sector strategy / stakeholders consulted / sector strategy: x impacts reflected	Who has a say in a sector strategy? Are gender issues and poverty relevant aspects reflected and addressed in a strategy?
		Mechanism for regular exchange on trade and trade policy between civil society (with x% or no of women's organisations / gender-concerned NGOs in trade) and government is put in place	Procedure of mechanism, agenda of meetings	Is input by civil society possible in relation to trade? Are there mechanisms allowing for exchange?
		A monitoring system / survey / assessment provides disaggregated information on (x) socio-economic impacts of trade agreement(s)	Information in monitoring system – own control	How informed is the political level of socio-economic effects of trade and trade agreements?
Policy / TFEAs / RTAs	Consultations	Data on socio-economic impacts is discussed / used by the MoTCI / trade commission / trade associations in x	Data reflected in / action plan / x	Is the data used for policy dialogue, policy advice and adjustments?
		No of ministry staff/ negotiators etc. trained on gender issues within TA/RTAs / trade liberalisation processes (m/f)	Training concept, participants list	Are relevant stakeholders participating in trade negotiations or preparations of TAs/RTAs aware of relevant gender dimensions and issues?

Instrument	Category	Indicators	Means of verification	Key questions to ask
Policy / TEAs / RTAs	Capacity development	Knowledge of Ministry staff / negotiators (m/f) on gender issues / gender-related distributional effects in trade has increased	Exit survey of training comparing knowledge before and after	ibid
		x% of ministry staff / negotiators / private sector participants are female	Records of meetings	Are women included as decision-makers in TA/RTA negotiation processes (private/public sector)?
		Focal point for gender in trade appointed at Ministry level / trade commission (established as part of TA)	Terms of reference, Focal Point	Is gender reflected in institutional structures in trade?
Trade institutions – meso	Capacity	Supported institution(s) (e.g. female trade associations, cooperatives) increase their own budget by x% (membership fees, budget, projects) / ...increase their membership base by x%	Records / financial data of institutions	Do women count with relevant business institutions? Are women members of business institutions, do they get business related support services?
	Quality of business services	Increase/decrease in level of satisfaction with business related services by CoC/ trade associations / cooperatives etc. by sector, m/f (Differences in levels of satisfaction m/f)	CoC / trade association / cooperative surveys (or own survey)	Do business development service entities provide relevant services for men and women?
	Trade impacts	Increase in satisfaction (%) with BDS / representation of interests by trade association / cooperative (m/f)	Survey - BDS / Trade association / cooperative – or own	Differentiated levels of satisfaction – are women and men differently represented or taken care of at BDSs?
		Increase (%) of male/female owned businesses who believe their concerns are adequately addressed in public-private dialogue mechanisms	Own survey	Who determines (m/f) what is discussed in PPDs?
	Participa-tion	In x PPDs gender-relevant issues are discussed and relevant action points drawn and submitted to x (public political trade entity).	Agenda of PPD, action points	Do gender concerns find their way onto the agenda of PPDs? Do they find their way to the political level?
Quality of business services	Increase in female membership in trade associations / cooperatives Increase in no of female trade associations / cooperatives	Trade association membership statistics	Are women associated in relevant business networks, sectoral associations, cooperatives etc.?	
Trade facilitation		No of BDSs targeting women (increase in %) Increase in no of services of BDS targeting women Level of satisfaction of women with BDS services increase by x%	BDSs in operation	Do women have access to BDS, sufficient services targeted to women?
		Trade facilitation strategies / implementation or action plans include gender (and poverty/conflict) related measures (emanating from DTIS/PIA or other)	Strategies	Are results from impact assessments translated into further strategies / implementation plans?
		Increase in no. of women trading through formal processes (categories of traders)	Customs administration / border statistics	Are improved, harmonised procedures contributing to formalised trade?

Instrument	Category	Indicators	Means of verification	Key questions to ask
Trade facilitation		(Decrease in) No of hours/days to clear goods, by m/f, informal/formal traders – m/f, SMEs – m/f, non-motorised traders – m/f)	Survey – administration or own	Do trade facilitation help women/men equally, how long does it take for different groups and men and women to clear goods, what is the change?
		Increase in consultation of hotline / information system for customs procedures / border processes (m/f, informal / formal trader – m/f, non-motorised traders – m/f)	Statistics	Are men/women equally aware of points of information on harmonised procedures?
		No of users of online customs forms / new forms (m/f, informal / formal trader – m/f, non-motorised traders – m/f)	Internet statistics	Who uses the online forms, is access to forms different among the different groups, for m/f?
		Complaints mechanisms in place	Statistics of mechanism	Is anybody disadvantaged, who faces more difficulties and harassment?
		No of complaints (m/f, informal / formal trader – m/f, non-motorised traders – m/f)		
		Decrease in harassment incidents (m/f, informal / formal trader – m/f, non-motorised traders – m/f)		
		No of procedures and documents required by agency/administration x (m/f, informal / formal trader – m/f, non-motorised traders – m/f)	User survey	How complicated are the procedures, have they been simplified? Is there any difference in requirement based on gender, occupation etc.?
		Total cost of logistic requirements (m/f, informal / formal trader – m/f, non-motorised traders – m/f)	User survey	Do costs vary for different groups, men and women? Reasons (corruption level?)
		No of women stating they can move freely / need permission of husband to travel	Own survey	Are women restricted in their movements?
		Value chain development	Analysis	Gendered value chain analysis processes (mapping or else) conducted with x communities (m/f participation)
X issues from gendered VC mapping addressed	Own assessment			Have the insights from the VC mapping been used, has the strategy been changed to take gender aspects into account?
Trade impacts	Increase (in %) in market access – no of negotiations for export as a result of participation in a trade fair (m/f, with targets)		Own survey	Who gains from linkages to export markets? Differences? What are the reasons?
	x% of male, x% of female representatives of (M)SMEs state improvement of trade opportunities		BDS, CoC, trade associations or cooperatives survey	Are trade opportunities perceived in the same way by men and women? Do m/f feel they have lost out on trade opportunities?
	Export revenues increase by x% for male and x% for women in supported VC export areas		Export statistics, national M&E, sectoral trade associations	What is the financial gain from export increase for men and women (related to supported VCs)?

Instrument	Category	Indicators	Means of verification	Key questions to ask	
	Trade impacts / occupational level	Change of men and women working in functional nodes of a VC (set percentages for m/f)	CoC, trade association statistics or own survey	Where are women located in VC? Have they moved up in occupations/functional nodes? Can they participate in and benefit from extra value addition?	
		No of m/f who have advanced within the value chain	Survey / Analysis	Are women disadvantaged, moving slower than men in VCs? What are reasons? What can be done?	
Trade institutions and VCs	Employment	No. of workers by sector / occupation (m/f)	Labour statistics, trade association / CoC statistics	Who benefits from increased employment in which sector and occupation – men / women?	
		Increase in m/f employment by sector/ occupation	Labour statistics, trade association / CoC statistics	Who benefits from newly created jobs? In which segment/ occupation are men and women located?	
		No. of newly created jobs by sector/ occupation (m/f) (Difference between occupation levels for m/f)	Business records	Have new jobs been created by (supported) businesses? Is there a difference between male and female-owned businesses in job-creation? Is the job-creation related to increased exports (separate data, calculation)?	
		Increase in no. of employees of m/f owned businesses (Correlation of increases in employees and increase in export/ export revenues?)	Trade association / cooperative or own survey	Can women / people without land ownership benefit from VC development?	
		(M)SMEs benefiting from VC development measures increase employment by x%, amongst them x% (or x number) women / women and men without land ownership	Trade association / cooperative / CoC statistics	Who are the entrepreneurs (m/f)? Do women face constraints to set-up /register a business?	
	Owner-ship	Wage gap	Increase in female-owned (M)SMEs (proportional to m-owned)	Labour statistics, trade association / CoC statistics	Do men and women earn the same salary within the same level and occupation? What is the gendered wage gap and are there changes in the wage gap with increasing export revenues?
			Salary level by occupation (m/f) Wage gap between male and female salaries by occupation and gender Male and female wage gains (%) by sector / occupation (Correlation of decrease of gendered wage gap with export revenue increases?)	Poverty statistics, national census, international databases	How is male/female poverty affected?
		Social changes	Decrease/ Increase of poverty levels (m/f) (might be pertinent to assess in relation to specific geographical areas with trade impacts/export industries etc.)	Trade associations or own survey	What is the additional income spend on by men and women?
			Spending of additional income at household level by categories (m/f)	Trade associations or own survey	What are the changes in employment/economic activity/ income perceived by m/f? Benefits or losses?
			Changes in social status (m/f)		

Instrument	Category	Indicators	Means of verification	Key questions to ask
Trade institutions and VCs		Perceived benefit / loss in relation to trade /economic activities (m/f)	Trade associations or own survey	What are the changes in employment/economic activity/income perceived by m/f? Benefits or losses?
	Trade impacts	Export increases by sector/ size (m/f owned (M)SMEs) (Differences in export increases between m/f owned (M) SMEs by sector/ size)	Export statistics, CoC, trade associations or cooperatives	Who exports what (m/f)? Is there a difference in increases in exports between m/f owned MSMEs?
		Export revenues increase by x% for male and x% for women (in supported VC export areas)	Export statistics, national M&E, sectoral trade associations	What is the financial gain from export increase for men and women (related to supported VCs)?
		Change of men and women working in functional nodes of a VC (set percentages for m/f)	CoC, trade association statistics or own survey	Where are women located in VC? Have they moved up in occupations/functional nodes? Can they participate in and benefit from extra value addition?
		Additional income generation opportunities created from side-products in VC (for m/f)	VC mapping	Are export opportunities expanded to other side products, for potential markets, do they hold opportunities for cash crops for women?
		Increase of women's participation in cash crop VCs	Records of cooperatives	Can/ are women advancing to production of cash crops (which hold more potential for exports)?

Source: Authors compilation, benefiting from GIZ Indicators, McLaren/Kolaric 2013, ODI 2010a, 2010b.



4 Key issues for gender in trade

Chapter 1 and 2 have revealed that gender inequality can obstruct trade outcomes, limits competitiveness and thus economic benefits from trade openness. If implemented without taking into account existing gendered economic roles and gendered division of labour, trade liberalisation can aggravate existing inequalities, deepen disadvantages for women while at the same time limiting the economic potential of trade openness.

Employment opportunities for women and increased income have in most of the practice examples led to increase in social status, self-esteem and even positively contributed to gendered power relations at household level, chapter 2 reveals. The assumed relationship of increased income leading to positively perceived economic empowerment and autonomy for women, also from the perspective of communities and men has thus

been confirmed. While gender mainstreaming should be crosscutting in all trade programs, specific approaches for the economic advancement of women are necessary to close existing employment and wage gaps as well as address barriers related to gendered economic roles and existing norms.

Consequently, within the trade policy related instruments, a number of key issues (specific examples of related approaches are described in chapter 2) have to be taken into account and addressed in order to mitigate possible negative impacts of trade on gender equality and equity.

Measuring gender in trade

- Disaggregated data is key within trade impact assessments, AFT programs and national statistics. Development partners should provide support to national statistics offices or other relevant entities, including

trade associations, establish monitoring systems that collect disaggregated data and analyse the data regularly.

- Quantitative data is to be complemented by qualitative assessments in order to assess changes at household level relevant to poverty reduction, intra-household spending, power relations and agency.
- Further research and disaggregated data is required portraying the reciprocal relationship of trade and gender equality and equity much more in detail.

Trade agreements and trade negotiations

- Mitigation of negative gender-related distributional effects from trade starts with ex-ante trade impact assessments covering gender comprehensively. They have to clearly analyse who will be affected in which way from expanding or possibly shrinking sectors with disaggregated data on employment, wage gap, working conditions and possibilities of professional advancement. Impact assessments (DTIS, SIA, PIA, PSIA and others) are particularly necessary ex-ante of (trade negotiations) for TAs/RTAs.
- Trade negotiations, trade policy and AfT need to reflect and address information gathered from the impact assessments on expanding and potentially contracting (export) sectors in terms of male/female labour participation as well as social and poverty impacts for different income groups.
- Trade-related civil society organisations with gender expertise should be consulted in TA negotiation processes. Negotiators and/or technical staff involved in TA/RTA negotiations need to be trained on gender-differentiated distributional impacts of trade and/or be provided with comprehensive input covering gender issues for trade negotiations in relation to the respective TA/RTA.
- Trade agreements and related strategies should be gender aware, e.g. disaggregate impacts for men and women and differentiate 'gender neutral categories' such as producers, entrepreneurs etc.
- If not included in TAs/RTAs, trade reforms, policies and AfT should integrate / address corrective measures and/or additional clauses reflecting issues from the gendered impact assessment.

- Export strategies and/or trade policies should be reviewed to integrate gender and include specifics on how to advance women's economic participation and address existing barriers in women's access to skills development, finance etc..
- Losses in government revenues through tariff cuts resulting from TAs/RTAs need to be assessed and calculated in relation to their potential gender and social impact (social services cuts impact women, children and the poor the most). Compensatory efforts to balance such impacts should be discussed and integrated in the related trade reform process.

Trade facilitation

- Harmonisation and simplification of regulations and procedures can benefit female traders in particular, as they constitute a large majority (especially in informal trade), however, information on customs and border reforms has to be disseminated adequately and targeted to women, taking into account lower literacy levels (easy guidelines and information material) and channels of information available to them.
- Single window approaches or one-stop shops should integrate specific services for female traders and WICBTs (disseminating information on simplified procedures, advisory services, training etc.) to enhance formal trade.
- When moving to paperless and computer-based procedures, low literacy levels of women (and men) should be taken into account requiring additional approaches and specific assistance (e.g. as part of one-stop shop services).
- Approaches that increase transparency on corruption and malpractices (non-tariff barriers) around customs and border management should be pursued as they particularly benefit women and would lower their vulnerability for (sexual) harassment and gender-based violence.

Value chain development

- Value chain analysis has to be gender differentiated, analysing the level of involvement, barriers for participation and advancement for women in the VC. Gendered value chain mapping exercises, baselines, time surveys and other forms of analysis

are tools to be applied and should, where possible, include communities. They allow identification of entry points for specific measures to empower women or advance them in the VC.

- Advancement in the value chain for women to functional nodes where value addition happens (in agriculture, women mainly contribute often unpaid labour to cash crops at the production node) should be supported through value chain development and/or specific value chains for export products of women.
- Market linkages have to be established, e.g. through trade fairs or direct contact to international buyers with a special emphasis on women in order to facilitate their access to (new) export opportunities.
- Adaptation of production processes to enter new markets, including technical regulations and (social and voluntary) standards might be more difficult for women due to their limited access to productive inputs. Supporting their inclusion in (female) trade associations, cooperatives and the development of targeted business development services for women can increase their productivity.
- Limited access to skills development and occupational training is a particular barrier for women to advance in the VC. Specific training opportunities with hands-on training curricula covering specific job-related skills as well as business skills should be developed and integrated in existing training institutions and/or trade associations.

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