

GENDER AND TRADE ACTION GUIDE

A TRAINING RESOURCE

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Published by the Commonwealth Secretariat
Designed by Julie Nelson Rhodes
Printed by Hobbs the Printers, Totton, Hampshire , UK

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Copies of this publication may be obtained from

The Publications Section
Commonwealth Secretariat
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London SW1Y 5HX
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Fax: +44 (0)20 7839 9081
E-mail: publications@commonwealth.int
Web: www.thecommonwealth.org/publications

ISBN: 978-0-85092-862-4

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Acknowledgements

A host of individuals were instrumental in the development of this action guide, and the authors would like to take this opportunity to acknowledge their inputs.

We wish to thank those who were kind enough to take the time to provide advice and comments at various draft stages of the guide: Jacqui MacDonald, Doriene Rowan-Campbell, Biplove Choudhary, Zohra Khan and Hilda Tadia.

Thanks are due for the contributions from participants and resource persons at the regional workshops on Gender, Trade Policy and Export Promotion held in Arusha, Tanzania, Ocho Rios, Jamaica, and New Delhi, India.

Thanks are due to Fatimah Kelleher of the Commonwealth Secretariat for researching some of the case studies and managing the project in the later stages of development, to Tina Johnson for her editing skills, to Guy Bentham of the Commonwealth Secretariat for his guidance as Publications Manager, to Julie Nelson Rhodes for her graphic design vision and to Jennifer Fonseka of the Commonwealth Secretariat for her administrative support.

Thanks are also due to Ann Keeling, Director, Social Transformation Programmes Division, for her encouragement and support throughout this project.

Many thanks to those organisations who have allowed us to reproduce their material and have always cooperated with us in providing copies of their books and papers, and to those individuals who produced original case studies from their own work for the project.

Finally, thanks go to the UK Department for International Development (DFID), which has funded the project on Capacity-building in Gender and Trade at the Commonwealth Secretariat, and to Hub and Spokes at the Commonwealth Secretariat for their assistance in the early stages of the project.

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Acronyms

ACP	African, Caribbean and Pacific Group of States
AFTA	ASEAN Free Trade Area
AoA	Agreement on Agriculture
APEC	Asia-Pacific Economic Cooperation
ASEAN	Association of Southeast Asian Nations
ATC	Agreement on Textiles and Clothing
ATO	Alternative trading organisation
BIT	Bilateral investment treaty
BTA	Bilateral trade agreement
CAFRA	Caribbean Association for Feminist Research and Action
CAFTA	Central American Free Trade Agreement
CARICOM	Caribbean Community and Common Market
CBD	Convention on Biological Diversity
CBTPA	Caribbean Basin Trade Partnership Act
CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
CIDA	Canadian International Development Agency
COMESA	Common Market for Eastern and Southern Africa
COMSEC	Commonwealth Secretariat
CSME	CARICOM single market and economy
DDA	Doha Development Agenda
DTI	Department of Trade and Industry
ECOWAS	Economic Community of West African States
EEC	European Economic Community
EFTA	European Free Trade Association
EPA	Economic Partnership Agreement
EPZ	Export Processing Zone
ETI	Ethical Trading Initiative
EU	European Union
FDI	Foreign direct investment
FLO	Fairtrade Labelling Organizations International
FTA	Free trade agreement
FTAA	Free Trade Area of the Americas
GAD	Gender and development
GATS	General Agreement on Trade in Services
GATT	General Agreement on Tariffs and Trade
GDP	Gross domestic product
GERA	Gender and Economic Reform in Africa
GMO	Genetically modified organism
GRBI	Gender-responsive budget initiative
GSP	Generalised System of Preferences
GTIA	Gender Trade Impact Assessment

ICT	Information and communication technology
IFAD	International Fund for Agricultural Access
IGTN	International Gender and Trade Network
ILO	International Labour Organization
IMF	International Monetary Fund
IPR	Intellectual property rights
ITC	International Trade Centre
LDC	Least developed country
MDG	Millennium Development Goal
MERCOSUR	Southern Common Market
MFA	Multifibre Agreement
MFN	Most favoured nation
MNC	Multinational corporation
MTS	Multilateral Trading System
NAFTA	North American Free Trade Agreement
NAMA	Non-agricultural market access
NEWS!	Network of European World Shops
NGO	Non-governmental organisation
NTAE	Non-traditional agricultural exports
NTB	Non-tariff barrier
NTFP	Non-timber forest products
OECD	Organisation for Economic Co-operation and Development
PRSP	Poverty reduction strategy paper
RTA	Regional trade agreement
SADC	Southern African Development Community
SIA	Sustainable Impact Assessment
SDT	Special and differential treatment
SPS	Sanitary and Phytosanitary Agreement
SWOT	Strengths, weaknesses, opportunities, threats
TIR	Trade impact review
TNC	Transnational corporation
TRIMS	Agreement on Trade-Related Investment Measures
TRIPS	Trade-Related Aspects of Intellectual Property Rights
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNIFEM	United Nations Development Fund for Women
WAEMU	West African Economic and Monetary Union
WID	Women in development
WIDE	Women in Development Europe
WIEGO	Women in Informal Employment: Globalizing and Organizing
WTO	World Trade Organization

Introduction

by **Sarojini Ganju Thakur**, Commonwealth Secretariat

*'Gender equality implications of globalisation and trade liberalisation arise because these phenomena do not eliminate existing inequalities in access to resources, power and decision-making between men and women in society. This is a reality that must be confronted directly or else much of the tremendous investment in promoting the social and economic advancement of women will have been in vain'**

This statement brings us to the heart of the rationale for producing an action guide on gender and trade. There is a realisation that many countries, especially smaller countries, have only limited capacity to participate effectively in trade negotiations and to formulate appropriate trade policies. Yet, there has been much less focus on the relationship between gender and trade. In fact many assume that the processes of globalisation and trade liberalisation are 'gender neutral'.

* Williams, M (2003) *Gender Mainstreaming in the Multilateral Trading System: A handbook for policy makers and other stakeholders* Commonwealth Secretariat page 17

The terms on which women and men enter the labour market vary. These often depend on women's and men's different roles and responsibilities within the household, as well as their different access to resources – material, financial, technological and social. Women are concentrated in the informal economy and contribute disproportionately, and in unpaid terms, to care. In addition, there is a need to take into account women's roles not only as producers and workers, but also as consumers. The impacts of trade policy are thus different for women and men. Export competitiveness has created opportunities for women, but has also destroyed livelihoods for many of them. While many non-trade concerns have entered the negotiating arena – public health, food security and the environment, for example – gender has not, nor is it yet considered in the important areas of trade policy and trade agreements.

This **Gender and Trade Action Guide** is based on two premises:

- the need for greater understanding within public and private organisations and institutions of the gender implications of trade negotiations and policy; and
- the need to mainstream a gender perspective in such areas as impact assessments of trade agreements, trade policy review processes, capacity building and the special and differential treatment framework.

The guide is part of a wider initiative of the Commonwealth Secretariat's Gender Section on gender and trade. The mandate for the initiative arose in 2000, at the 6th Women's Affairs Ministers Meeting. There, ministers expressed concern at some of the negative impacts of globalisation and trade liberalisation and 'recommended that governments should use gender analysis in the negotiation and implementation of the liberalisation process'.

The Secretariat's work on gender and trade has developed in two phases. The first phase **Building the case** (2002-2005) concentrated on analytical work. This resulted in a path-breaking book, *Gender Mainstreaming in the Multilateral Trading System* by Mariama Williams, which focused on the importance of gender dimensions in trade policy-making. A second book, *Chains of Fortune: Linking women workers and producers with global markets*, edited by Marilyn Carr, provided case studies of how poor women producers and workers had been successfully linked with global markets.

The current phase **Moving from analysis to action** (2005 onwards) has been about influencing and informing. The focus has been on developing the capacity of public and private sector institutions and civil society organisations, national and regional, to integrate gender analysis in trade-related negotiations, policy and implementation. During this phase, funding from the UK Department for International Development (DFID) for a gender and trade capacity-building project has added momentum and enabled

dissemination and advocacy in a manner that would not have been possible earlier. The project has focused on the Caribbean, South Asia and East and Southern Africa.

Activities within the project include:

- regional capacity-building workshops in gender, trade policy and export promotion
- advocacy at regional and international fora
- development of a gender and trade e-newsletter, e-network and website
- embedding processes in two countries
- development of this action guide – a training resource aimed at officials, researchers and civil society organisations from both the gender and the trade fields.

The approach to the current phase was developed in February 2005 in Kampala, Uganda, based on a consultative process with academicians and national, regional and international representatives from ministries of trade and gender affairs and civil society organisations. It concluded that that the main focus of our efforts in gender and trade should be to bridge the conceptual and physical divide that exists between trade and gender. This includes the gap between those responsible for trade and gender in governments, as well as the one between government officials and members of civil society organisations who are nearer the ground, more aware of the impacts of trade liberalisation on women and men and whose voices need to be heard.

Our approach has been to establish dialogue and to develop mutual understanding. This involves exposing trade negotiators and policy makers to the need for gender analysis, and introducing gender ministries to the overall framework of trade negotiations. Policy commitments at all levels bind governments, but the dialogue between those involved in policy-making in these two areas has been limited. As a result, the different priorities, language and constraints are not fully understood.

This action guide is informed by the same process. It aims to help those involved to take action – to get gender onto the regional, bilateral and international trade agenda and to recognise and seize the opportunities trade can offer to further development and alleviate poverty. It also identifies the ways in which women producers and workers can take advantage of the new economic opportunities offered by trade liberalisation, gain access to global markets and access better wages and working conditions within the global value chains of which they are a part.

The action guide is flexible. It can be used in many different ways by people coming at the issues from many different angles of trade or gender and

with different roles. It is intended particularly for people who are in some way responsible for capacity building and bringing about change – for example, through training, briefing or lobbying. It can be used as a basic introduction to the topics, as a resource to develop capacity building or training programmes for others or as a self study resource. However it is used, the aim is to enable people to take action and apply what is learned to their own context and requirements – to turn information ‘about’ trade and gender into practical action. It is accompanied by a CD-ROM of key readings and recommended texts.

The guide is divided into 10 units.

Unit 1 Getting started introduces the action guide’s approach and contents and ways to use it.

Unit 2 Concepts, Unit 3 The trade policy environment, Unit 4 The multilateral trading system and Unit 5 Regional and bilateral agreements are all briefing units that cover the basic concepts and essential information, with related case studies.

Unit 6 Joining the global economy presents ways women producers and workers can benefit from the opportunities of trade liberalisation.

Unit 7 Tools, Unit 8 Planning training and Unit 9 Resources are a resource for capacity building, to be used in conjunction with the other units.

Finally, **Unit 10 Planning action** helps identify the way forward.

And from there to implementation, and to equitable outcomes for women and men.

Getting started

'I want to build a gender perspective into my knowledge of trade issues and to be able to share this with other stakeholders.'

'I need tools for implementing gender in trade policy and practice.'

'I want a better understanding of the global trade agenda and the gender implications as they affect this region.'

These are some of the reasons that participants at a trade and gender workshop have given for needing to know more about trade and gender. Perhaps your own reasons are similar.

This unit introduces the action guide's approach and contents, and ways to use it. The unit will help you to:

- define your own objectives for using this action guide
- identify the parts of the action guide that best meet your needs
- draw up a plan for working through the action guide.

In this unit

Your task
Using the action guide
Learning action plan

Your task

First, think about your task in relation to trade and gender. What is it that you want to do?

For example:

- Do you take part in policy-making or strategy development?
- Are you planning a particular project or campaign?
- Are you working towards a specific event or development?
- Are you trying to understand why gender is important for trade negotiations?

Make notes about your task below.

Activity 1.1: Defining the task

What is your task in relation to trade and gender?

What are the steps you must take towards achieving your task?

What is the timeframe for achieving your task?

What are the gaps? What do you need in order to achieve your task?



Using the action guide

Now you have thought about your task, let's look at some aspects of using this guide.

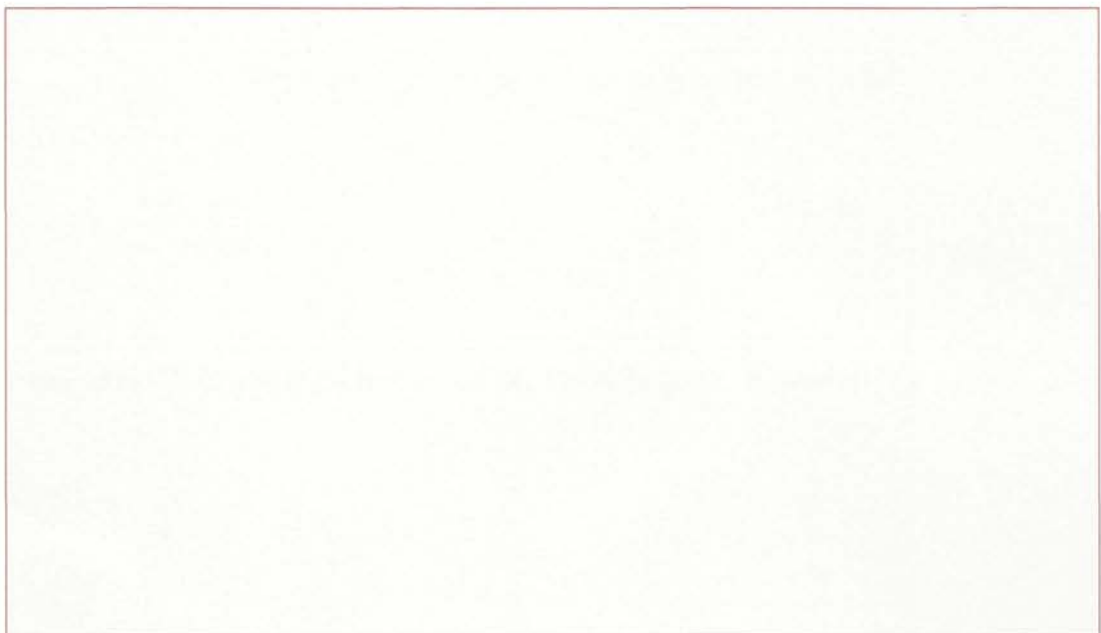
Here are some thumbnail sketches of the kinds of people who may be using this action guide:

- a research officer in a ministry of tourism (or agriculture, etc)
- a business development officer in a ministry of industry and international business
- a manager from an economic policy and planning unit
- a trade officer from a chamber of commerce
- a senior foreign service officer from a ministry of external affairs,
- a gender officer from a department of gender affairs
- a university director from a centre for gender and development studies
- a member of a women's business network
- a regional trade policy adviser
- a trade negotiator from a regional negotiating machinery
- a member of a women's non-governmental organisation (NGO) or a centre for gender action and research.

Other?

Do you recognise yourself on this list? If so, copy the description in the box below. If not, add your own profile.

Activity 1.2: Profile



Next, what do you hope to achieve by working through this action guide? Note down your three main objectives.





Activity 1.3: Three main objectives

1

2

3

To help you identify how to make the best use of the action guide, read the following sections about background, what's in the guide and approach.

Background

The Commonwealth Secretariat (COMSEC) identified the need for this action guide as part of its programme on Gender, Trade Policy and Export Promotion. COMSEC's experience, and that of many other organisations (such as the United Nations Conference on Trade and Development – UNCTAD), is that although trade clearly has different impacts on women and men, these differences are not adequately known or understood. There is also a lack of practical material to help people understand the differential impacts and take action in their work to address them.

COMSEC has run a series of face-to-face regional workshops on trade and gender. There has been considerable demand for these, but it is not possible to provide enough workshops to meet the need worldwide. This action guide can reach a far wider audience and it can be adapted to be used in many flexible ways. It also provides a starting point for other institutions to take the work forward.

The action guide thus shares the same overall purposes as the COMSEC programme on Gender, Trade Policy and Export Promotion:

- to sensitise trade policy makers to the impacts and implications of gender issues
- to integrate gender analysis into trade policy formulation
- to sensitise export promotion officials to the need to integrate gender in all strategies
- to present options on ways in which women producers and workers can take advantage of new economic opportunities on more favourable terms

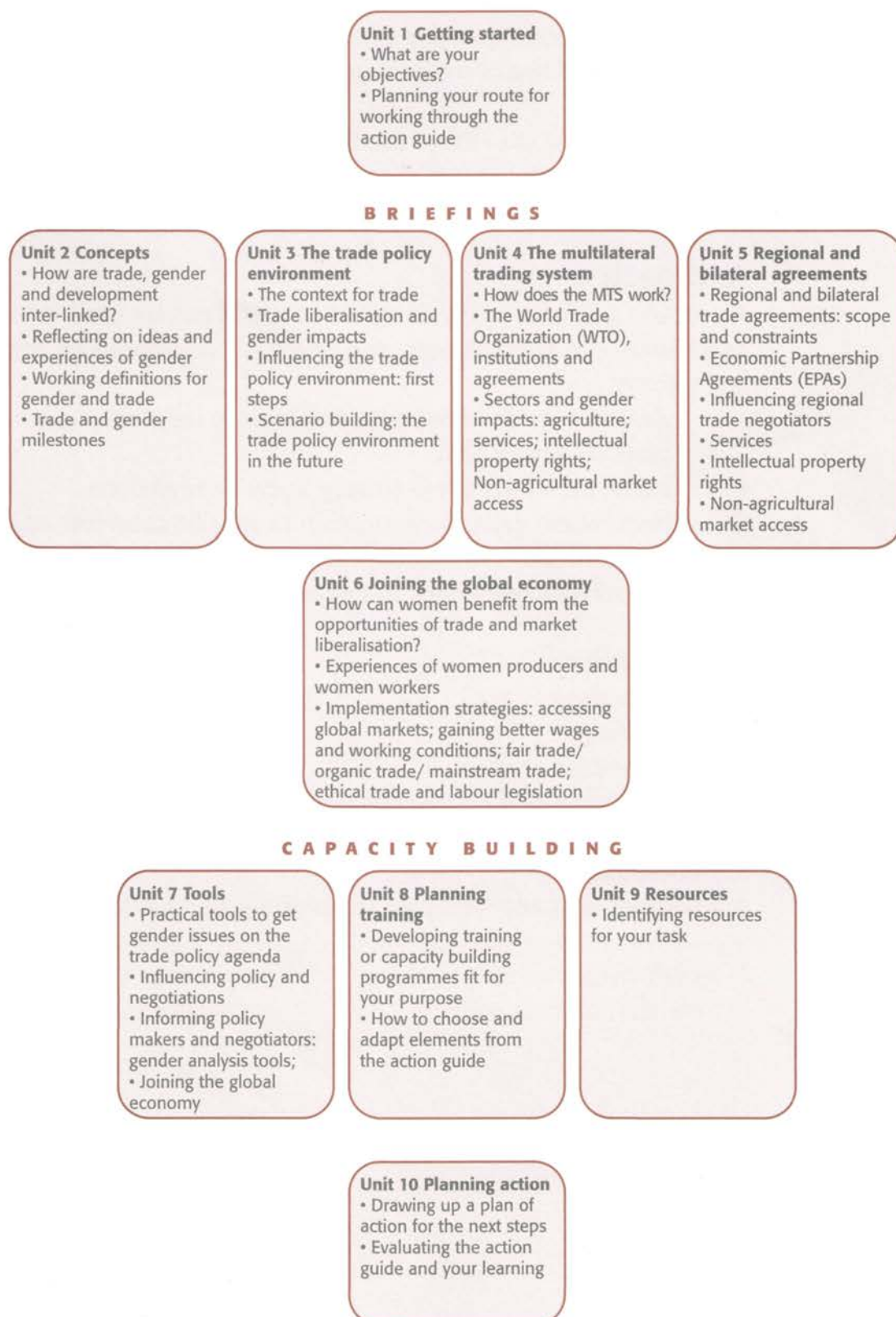
It aims to do this by:

- analysing gender impacts of trade policy on employment and entrepreneurship
- focusing on region-specific and sector-specific issues and trends and their gender impacts
- building capacity to integrate gender analysis in trade policy formulation and implementation
- building capacity of public and private institutions to enable women to respond to changes in trade policy.

What's in the action guide?

Here is an overview of the action guide, with an outline of what the units cover. Spend a few minutes now reading through the overview and highlight the units that seem to meet the needs of the task you identified above and your main objectives. Browse through the units themselves for a more complete picture.

OVERVIEW



Note that the action guide falls into two main parts.

- 1 Units 2–6 are briefing units that cover ‘why?’ and ‘what?’ – concepts, context, issues and background information – a basic introduction to the subject.
- 2 Units 7–9 are resource units that cover ‘how?’ – capacity-building tools and resources to enable people to take action and apply what they have learned to their own context and requirements.

Units 1 and 10 are about getting the most out of the action guide itself.

In addition the accompanying CD-ROM contains key readings and the complete text of books recommended for further reading.

Look back now at your list of the three main objectives you hope to achieve by working through the action guide (*Activity 1.3*). Note where they are covered by the outline above.

Approach

The action guide is flexibly designed so that it can be used for self-study or as a resource to build capacity and develop programmes for others. In its approach it:

- aims to provide knowledge and tools to help people draw up a practical action plan
- builds on what people already know or have done
- helps relate general information to specific countries, regions, sectors and contexts
- encourages teamwork and networking.

Each unit includes:

- objectives
- briefings
- short case studies
- recommended key reading on CD-ROM
- activities
- training suggestions
- end-of-unit review.

Key questions

Ask yourself now how you plan to use the action guide. Is it:

- as self-study material, working through it on your own?

If so, then the sections below on preparation and the learning action plan are especially relevant.

- as a resource to help you plan training or capacity building for others?

If so, you should still work through the action guide on your own first, before using it with others. The training suggestions in each unit and Unit 8 Planning training will be especially relevant for people planning to use the action guide as a resource.

Preparation

Before starting work on the action guide, think about the points below.

Getting support

Who can you draw on for support as you work through the action guide? Who is there locally, in your workplace, the sector and networks? Can you meet other people doing similar work? Or people in key target groups or with similar interests?

In your organisation, take time to get interest and support from management and colleagues as you work through the action guide.

Finding resources

Brief yourself on relevant documents and begin to keep a list of those that will be of use. Do any colleagues/ departments have useful reference collections? If not, start your own.

Timing

Each unit is designed to take between one and a half to three hours, but this will depend on you. Do you aim to get a quick overview? Or to study in more depth, following up suggestions for further reading and activities? In planning your route through the action guide, think about how much time you have and plan accordingly.

Learning

You don't have to start at the beginning of the action guide and work through each unit in order. You can adapt materials and activities to suit your needs. How do you like to learn? Some people might start by reading the action guide and suggested readings. Others might go straight to the activities. Others might use activities and ideas as a stimulus for talking to other people and learning from them. Follow the approach that you will find most effective.

Reflecting

Get in the habit of reflecting as you work through the action guide. Think how you can apply what you learn to your work, or what you might do differently in future in the light of what you learn. Use the review, found at the end of most units, to help you reflect.



Learning action plan

This activity brings together the questions you have thought about in this unit and will give you a plan for working through the action guide. Fill in the details.

Activity 1.4: Learning action plan

What is your task?

Purpose

Steps

Timeframe

What do you need to do the task?

What do you hope to get from the action guide?

Which action guide units will best meet your needs?

What will help you get the most out of the action guide?

How much time will you set aside for working on the action guide?
Over how many weeks?

How will you organise your work on the action guide over these weeks?

What other resources and people can you draw on for support?

At the end, how will you know you have succeeded in your objectives?

You should now have a clear idea of how you are going to use the action guide, and specifically which unit you are going to start with.

Unit review

At the end of most units there is a review of what has been covered. Use it to assess your progress. For example, look again at the objectives given at the beginning of this unit and check if you can now do them. Look through your answers to the activities again and see if you want to add to them.

This unit has covered the following main points:

- thinking about your own task
- an introduction to the action guide and how to make best use of it
- drawing up a learning action plan.

To recap, the learning objectives for the unit were to:

- define your own objectives for using this action guide
- identify the parts of the action guide that best meet your needs
- draw up a plan for working through the action guide.

2 Concepts

Trade, gender and development – how are they linked? This unit explores the key ideas and concepts needed to start addressing this question and to plan further action.

It will help you to:

- identify ways in which gender, trade and development are linked and affect each other
- give working definitions of key terms relating to gender and trade
- get an overview of trade and gender milestones and agreements.

The first section asks some basic questions about gender, trade and development and brings the issues to life with short case studies.

In this unit

Key questions: gender, trade and development
The impacts
Defining key concepts
Milestones
Glossary of key terms

Key questions: Gender, trade and development

? *How are they linked?*

Trade liberalisation has an impact on gender inequalities (primarily via employment, wages and its effects on the care economy). Conversely gender inequality has an impact on trade performance – for example, in terms of capacities and skills and the impact on production. Both trade and gender need to be seen in the context of development based on human well-being.

? *Why is this issue of importance now?*

Measures of development based on market criteria (income or consumption) are now being replaced by others based on human well-being – as reflected, for example, in the Millennium Development Goals (MDGs). So trade policy reform must be re-evaluated too. Besides looking at the social impacts of trade based on growth and market access, we need to look at it in terms of social content – social relations (such as class, gender, race) within and across nations. So we are talking here about developing a gender-aware approach to international trade, recognising that there is more to eliminating poverty than efficiency and growth.

? *What's the impact of trade liberalisation on gender inequalities?*

Economists have been working on the questions of trade and the economy, gender and growth for a number of years. There are gains and losses, winners and losers, depending on the country (e.g., developing or industrialised) and sectors of the economy (e.g., agricultural, manufacturing or services). There are variable impacts on paid employment and household income – a gain in one area may mean a loss in another. For example, employment gains could be accompanied by lower wages and poorer working conditions. Or an increase in family income could occur with a decrease in food crop production for family consumption. Trade liberalisation may also impact on the unpaid care economy – often care is squeezed or carers' leisure time is cut. It also affects both women and men as both consumers and workers.

For everyone to benefit from trade liberalisation, the state must redistribute benefits from winners to losers. Yet if trade liberalisation is part of a package of market deregulation, privatisation and fiscal austerity, governments may not be able to soften the negative consequences. There may be cuts in social services or fees may be charged, with the impact mainly on poor people, most of whom are women. However, governments can implement statutory and complementary measures to mitigate negative effects.

So these gender inequalities are multi-dimensional. There are different

impacts on women and men and also different impacts on different groups and individuals. It's not just that some women or men win and others lose. The same women or men may gain in one way and suffer in another.

? *What's the impact of gender inequalities on trade performance?*

Gender inequalities (such as gaps in control over material, social and political resources by men and women and in education and health) often dampen productivity and hinder trade. They can make it harder to build capacity in the current workforce and the future one. Wage inequality can have a positive impact on trade, by creating a competitive advantage, but that trade can always be moved away to another country where wages are even lower.

? *Why don't trade agreements and policies take gender into account?*

It is partly through ideological constraints and the assumption that trade is gender neutral and affects both sexes equally. There is the belief that expansion of markets and growth will bring higher incomes and well-being that will benefit all, ignoring the underlying gender inequalities. And it is partly through institutional constraints. For example, in terms of governance, women's voices are largely absent in trade policy-making institutions and trade negotiations. While there is increasing recognition of the social and development dimensions of trade, this is not reflected in the structures of organisations like the World Trade Organization (WTO). At national level, ministries of trade need to work more closely with ministries of gender affairs to understand the relationship between gender inequality and trade policy. There is a need for monitoring mechanisms. This would help policy makers understand why the expected results from trade liberalisation may not come about.

However, there is an ongoing debate on this question. Some argue against linking trade concerns in general with non-trade concerns (such as gender, labour standards or human rights) where international commitments already exist.

? *What are the steps towards a gender-aware approach to trade?*

One key conclusion is that gender analysis is essential to form trade policies and agreements that lead to gender equality and human development. As trade affects women and men differently and gender inequalities have different impacts on trade, information is needed to underpin policy-making.

More work is needed to investigate the dynamics of gender, poverty, trade and growth in different countries. There needs to be more gender awareness in the design of trade policies, and gender mainstreaming and capacity building has to take place in trade ministries. There also needs to be discussion of the gender implications of multilateral and regional trade negotiations. Possible mechanisms for this would be the inclusion of gender

assessments in trade policy review mechanisms and the integration of gender in the aid for trade agenda. And finally, policy-making needs to be more democratic, with the voices of poor people – both women and men – heard at all levels.

The impacts

This section puts a more a human face on how trade, gender and development are inter-linked and the impacts on the ground.

First, to set the scene, here's an example to illustrate the human impact of globalisation and changes in market conditions. It looks at banana production in St Lucia, where many of the small producers have traditionally been women.

Case study 2.1: Banana production in St Lucia

The move from sugar production to bananas in the early 1960s in the agricultural sector in St Lucia brought new hope to farmers. Banana cultivation was less labour intensive than sugar cane and certainly was not as reminiscent of conditions under slavery.

So profitable was the cultivation of bananas – particularly to the smaller producers, who were mainly women – that it was referred to as 'green gold'. Banana cultivation gave farmers the confidence and the ability to take charge of their lives as it brought very good financial returns. It allowed for small farmers as well as large plantation owners to participate.

The impact of the banana industry soon became very visible on the St Lucian landscape, particularly in the rural areas. Even small peasants were able to purchase land, build decent houses and have a good standard of living. They could afford to send their children to colleges and universities locally and overseas. This prosperity filtered through the entire economy and gave the island much vibrancy as infrastructure and superstructures were put in place to meet the needs of the people.

During that time, St Lucia received preferential treatment for the sale of its bananas in the United Kingdom. It benefited as a member of the ACP countries under the Lomé Convention.

But globalisation and changes in European market conditions after 1993 had a disastrous impact on St Lucia. Because of the island's small size, it was not able to produce the large quotas to enable it to compete effectively on the open market.

The result was that farmers were forced out of banana production with no



alternative means of income. Many of them were unskilled in other areas and did not possess high levels of education. They were now unable to sustain themselves and the lifestyle that they had become accustomed to. They were not able to meet their commitments to their banks and other financial institutions. They could no longer finance their children's education at institutions of higher learning. Many even had difficulty in providing for their children to attend school locally.

According to some commentators, there were positive effects: they argued that the changes created more efficient banana farmers, enabling them to meet high market standards. But the impact was particularly calamitous on women. Many rural women worked as peasants on the banana farms and, although they did not own farms, they made a decent living working for the plantation owners and were able to support their families. The sudden loss of such income left many of these women destitute.

However, early in 2007 the situation changed again. The UK supermarket chain Sainsbury's announced that all the bananas it sells from now on will be fairly traded and that nearly 100 million of them will come from St Lucia. As a result of this intervention, there can once again be investment in schools, roads and community facilities.

SOURCE: LERA PASCAL, DIRECTOR OF GENDER RELATIONS, MINISTRY OF HEALTH, ST LUCIA.

Now read the following two case studies, one about women as producers (gum collectors) in India and the other about women as workers in the Bangladesh ready-made garment industry.

To help you read them carefully, note on the table that follows the case studies whether the gender impacts described in the trade, gender and development key questions at the beginning of this unit occur in these two case studies, and how (*Activity 2.1*).

Case study 2.2: Gum collectors in India

Although the non-timber forest product (NTFP) sector has been relatively neglected in official statistics, we do know that there is a sizeable and growing international market for NTFPs including essential oils, medicinal plants, gums and resins, rattan and bamboo, natural honey, brazil and other edible nuts, mushrooms, various types of fibres, and shea and other types of wild nuts and seeds that can be used in cooking, skin care and for other purposes. In all there are now 150 NTFPs of major significance in international trade that involve millions of poor producers and workers, including many who live in the most remote areas of developing countries. With increased interest in natural health and beauty products fuelling a massive growth in demand for these products in North America, Europe and Japan, there are huge opportunities for producers in the



South to link with these markets. In many cases, there are also large and untapped domestic and regional markets for such products.

But does the increased demand and rising international prices for these products actually benefit the rural women who tend to be the main collectors of the raw materials? We look at this question through a case study in India featuring one NTFP – namely gum. This is a major export industry for the country, which is the world’s third largest exporter of gums and resins (excluding gum Arabic).

The Gujarat State Forest Development Corporation (GSFDC) has been involved in a widespread programme to plant *Prosopis juliflora* (locally known as ‘ganda baval’) trees in the desert region of the state. These trees can survive under the extreme desert climate and are used to form a green belt that checks soil erosion. During the dry season gum oozes out of the branches. The gum has several uses and a commercial value including in export markets. GSFDC obtains this gum through licensed contractors who then are supposed to employ workers to do the collecting. However, instead of hiring workers contractors usually buy the gum from women in the desert villages. This is a cheap method of conducting business since the women collect the gum illegally without licenses from GSFDC and therefore have no alternative but to sell to the contractors at a very cheap price. Women travel long distances – often up to twelve miles – to reach the gum areas and face very difficult conditions, including thorny branches that cause scratches and rashes. Normally a woman can collect no more than two kilos of gum in a day.

To address women’s exploitation at the hands of contractors and their difficult working conditions, the Self Employed Women’s Association (SEWA) has organised the women gum collectors into groups under the state government’s Development of Women and Children in Rural Areas (DWCRA) programme. SEWA obtained gum collection licences from GSFDC for these groups. As a result the groups started to get at least three times more money than they had received from the contractors. GSFDC also supplies the women with protective clothing to improve their working conditions. The increased income stability from gum collection under the DWCRA scheme is welcomed by the women. However, all is still not well. Gum collection is hard and hazardous work in comparison to embroidery or plant nurseries, and the women still make very little money during the year. Their problems are compounded by GSFDC. For example, at one time GSFDC, which has total control over setting the price for minor forest products such as gum, lowered the price from Rs12 per kilo to Rs6 per kilo. Enquiries revealed that as a result of trade liberalisation, lower-priced gums were being imported from the Sudan and other African countries and competing with local supplies, thus bringing down the price. Group leaders went to the headquarters of

GSFDC in Baroda and were able to argue for an increase to Rs8 per kilo, which is still very low.

In the meantime, open market rates had risen to more than double this amount but collectors are only allowed to sell to the GSFDC. Again, SEWA and the Banaskantha DWCRA Women's Association (BDWA) are helping women's groups to bargain with GSFDC to be allowed to sell on the open market. Another reason for this is that GSFDC does not have an effective marketing strategy. Without knowledge of domestic and export markets for the gum it buys from collectors, it simply sells its supplies to private traders (including from out-of-state) who resell to industrial users at much increased prices, including in export markets. Thus, SEWA and BDWA are also concerned to encourage GSFDC to improve its marketing channels and to help the women's groups to get more directly involved in the marketing chain.

As can be seen, therefore, although there is a plentiful market for gum from Gujarat and higher prices to be had, women have not been able to benefit fully from the new opportunities arising from globalisation. First, they suffered from a fall in prices due to trade liberalisation, which led to import competition. Second, they suffer from a situation in which they cannot become more directly involved in marketing – either domestic or export – because of the need to sell to GSFDC and also because of the lack of an adequate mechanism for finding out about opportunities in domestic, regional and export markets.

SOURCE: CARR, CHEN AND JHABVALA, 1997.



Case study 2.3: Garment workers in Bangladesh

Bangladesh has been one of the main beneficiaries of the quota system of the Multifibre Arrangement (MFA). The rise of the export-oriented ready-made garment industry has been a major result of trade liberalisation there. The industry currently employs 1.5 million workers, the majority of whom are women. It has been a major source of employment for rural migrant women in a country that has increasingly limited rural livelihood options, and where women migrants have been largely excluded from formal work in the cities.

The growth of the industry has been promoted through: (a) the introduction of international quotas and the associated phenomenon of quota-hopping, which supported the transfer of production and marketing expertise from Korea; and (b) the adoption of national export-oriented strategies that put direct export incentive schemes in place and simultaneously encouraged foreign direct investment through the establishment of Export Processing Zones (EPZs). While 5 per cent of the several thousand export-oriented factories in Bangladesh are joint ventures based in EPZs ('bideshi' factories), 95 per cent are 'bangla'

factories set up outside EPZs – many by those Bangladeshi entrepreneurs who were trained as management staff in Korea.

Women workers offer a low-cost and compliant labour force that allows the garment industry to compete in the global market. In spite of Bangladesh's ban on trade unions in the EPZs, working conditions there seem to be superior to that of other factories; however, only 12 per cent of the garment workers are employed in EPZs. EPZ and 'bangla' firms in Dhaka that deal more directly with international buyers are more susceptible to pressures to abide by labour codes and standards. Firms that subcontract, deal with the informal economy and have weaker links with major external buyers are much less susceptible.

A study was undertaken to explore the poverty implications of the export-oriented garment sector by comparing the situation of women workers in the export garment industry and those working for the domestic market. This allowed an assessment of the benefits accrued from the liberalised economy versus the non-traded sectors. The 1,322 women workers surveyed came from: (a) EPZ garment factories; (b) non-EPZ export-oriented garment factories; (c) self-employed workers; and (d) non-garment workers supplying the domestic market.

With the exception of EPZs, which employ better-off women and pay the highest wages with the best conditions, the garment export industry has directly benefited women from the poorer section of the rural population through employment opportunities. This has reduced marginalisation of women who were previously excluded from formal sector jobs and confined to a limited number of occupations. Many of these women have entered the workforce for the first time rather than having come from other sectors. Dhaka 'bangla' factory garment workers were able to contribute to their own and other family members' basic needs. Though they earned less than self-employed women, they earned more than the 'other' wage group outside of the garment industry. Remittances from garment workers also created redistribution of money from city to countryside and helped to raise the status of women in their families and communities.

However, the export-oriented garment industry does not represent an unambiguous improvement in working conditions compared to the rest of the economy. It has a high turnover rate. These women are a source of exploited labour and work intensely for a period of time and then move on, only to be replaced by a continuous supply of young women from the countryside. The health toll and conflicts with married life make the garment industry unsustainable over the long run. Nevertheless, those who become well-off have the opportunity to start their own businesses later, and women have been able to change their role as dependents

in an unprecedented manner through the growth of the garment industry. This has raised the visible significance of women as economic contributors to their families.

Prior to the phasing out of the MFA, there were predictions that up to 2 million women garment workers could lose their jobs, both through an absolute decline in markets and through technological upgrading in an attempt to compete (which would result in a transfer of jobs from women to men who have greater access to skills training). However, in defiance of predictions, the mass layoffs have not materialised and, in fact, since the lifting of quotas, garment exports from Bangladesh have grown by half a billion dollars, with most of the increased sales in the US market.

SOURCE: KABEER AND MAHMUD, 2004A, 2004B; HAIDER, 2006.



Activity 2.1: Gender impacts

Note on this table whether the gender impacts listed occur in the two case studies (yes/ no/ don't know) and how.

	Gum collectors in India	Garment workers in Bangladesh
Employment effects		
Gains or losses?		
Impact on working conditions		
Changes to work patterns		
Different opportunities for alternative work		
Wage effects		
Changes in income levels		
Changes to regular income		
Care economy effects		
Impacts on the care of children		
Impact on children's education		
Impacts on resources to support families		
Other impacts?		
E.g., changes in access to resources or markets		



.As explained in Unit 1, the training suggestions in each unit will be helpful if you are planning to use the action guide as a resource for training and capacity building for others. They suggest ways you could extend activities for work in groups or adapt them to your own context or purposes.

Even if you are using the action guide as self-study material, working through it on your own, the training suggestions may give you ideas for further study or research.

- Get an expert speaker and conduct an interview or hold a panel for participants using the trade, gender and development key questions.
- Get participants from trade and gender sectors to share experiences – e.g., actions, impacts, local issues.
- Use the trade, gender and development key questions as an exercise, so that participants from different sectors can brief each other and draw on what they already know.
- Replace the case studies with local case studies/ examples to examine, using the table of impacts (Activity 2.1). (See Unit 7, #8 *Developing a case study.*)
- From the trade, gender and development key questions, case studies and discussion, identify local issues and problems. These could provide topics to address during the remainder of a workshop, for example.

Using Unit 7 Tools

Unit 7 is a resource unit that suggests 12 tools and approaches for capacity building for gender and trade grouped under:

- influencing
- informing
- joining the global economy.

The training suggestions sometimes recommend using a particular tool. Look through Unit 7 and think about ways of using the tools for different units and activities.

Defining key concepts

This section is to help you think about personal ideas and experiences of gender, and to define key concepts relating to both gender and trade.

Thinking about gender

Reflection

As a starting point for thinking about gender, it is useful to reflect on your own experiences. This can help you remember the messages, spoken or unspoken, that you received from family, friends and peers. You will become more aware of the complex influences that shape expectations about women and men – how they should behave, what they can do and what they are like.

Activity 2.2 therefore asks you to think back to when you first became aware of gender issues in your own life. Spend a few minutes thinking about these questions and make brief notes. Try to tease out your own values and assumptions and how they came about.

Activity 2.2: Thinking about gender

When did you discover that you were different from the opposite sex?

What messages did you receive as a child about gender – about the roles, qualities and expectations for girls and boys, women and men?

Where did these messages come from? (e.g., family, school, peers)



How did this early learning shape your adult values and assumptions?

Defining gender

What do you think of when you hear the word 'gender'? How would you explain the term to someone else? Try not to look at the examples below before writing your own answer.

Activity 2.3: Defining gender

When I hear the word 'gender', I think ...

Here are a few responses from people taking part in a workshop on trade and gender. They raise important aspects of gender.

Social (= society-given) roles and ideas about what men and women do

Socially constructed differences between men and women

Feminist issues

Men and women

Unequal relations of power between men and women that pervade all of our institutions and social interactions

Definition changes over time and differs from country to country and within cultures

The working definition used in this action guide is:

- Gender means the socially constructed differences between women and men. These differ from one culture and society to another, they change over time and they define who has power and influence over what.



Gender and trade

The following terms about gender and trade are not a complete list, but are 10 key terms for topics that come up in Units 2 and 3. Have a go at writing your own definitions for them (or some of them). Then check the completed glossary at the end of the unit before the references.

Activity 2.4: Defining terms



GENDER
Gender
Sex
Gender relations
Gender policy, types of: Gender blind Gender neutral Gender specific Gender redistributive
Gender mainstreaming
WID and GAD
Gender balance
Gender equality
Gender equity
Practical and strategic gender needs

TRADE

Economic globalisation

Trade liberalisation

Privatisation

Protectionism

Free trade

Fair trade

Subsidies

Tariff/ Non-tariff barriers

Market deregulation

Export promotion



On gender and gender awareness

• there are more activities for group work and discussion in the following publications:

- *The GMS Toolkit – Trainers Guide*, Unit 4 Key concepts (COMSEC, 2004).

- *The Oxfam Gender Training Manual* – see particularly C2 Getting started, C3 Gender awareness and self-awareness and C4 Gender roles and needs (WILLIAMS ET AL, 1995).

On definitions

• In a mixed group (of gender and trade specialists) ask gender people to explain the gender terms to trade people and vice versa

• Have a brainstorming exercise on selected terms to reach definitions

• Or ask people to work in pairs and explain terms to each other

• Discussion: are these the key terms or should the lists be different?

Milestones

The chart on the next two pages gives some key dates for gender and trade.

Look through it, noting which events you already know about and which you would like to find out more on. Find out latest developments since those given here.

Then add some more milestones in the third column. These could be:

- world events (e.g., end of Cold War, East Asian Crisis 1997)
- regional, bilateral or national milestones relating to trade and gender (e.g., the creation of CARICOM as a regional milestone).

As an extra option you could add personal milestones from your own life or career, to relate your own experiences to the wider trade and gender developments.

	Trade	Gender	Milestones
1947	23 countries sign the General Agreement on Tariffs and Trade (GATT) in Geneva, Switzerland to try to give an early boost to trade liberalisation.		
1948	GATT agreement comes into force. Between 1948 and 1967 there are six GATT rounds of trade talks.	Universal Declaration of Human Rights.	
1970s 1973-79	Seventh GATT round, launched in Tokyo, Japan, sees GATT reach agreement to start reducing not only tariffs, but non-trade barriers as well.		
1975		First UN World Conference on Women (Mexico City). Start of UN Decade for Women: Equality, Development and Peace.	
1979		UN General Assembly adopts the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW).	
1980s 1980		Second UN World Conference on Women (Copenhagen).	
1985		Third UN World Conference on Women (Nairobi).	
1986-93	Uruguay Round is launched, the most ambitious and far-reaching so far, leading to reductions in agricultural subsidies, agreement re access for textiles and clothing from developing countries and extension of intellectual property rights.		
1990s 1994	Last meeting under GATT auspices to establish WTO and complete the Uruguay Round.		
1995	WTO (World Trade Organization) created in Geneva.	Fourth UN World Conference on Women (Beijing). Beijing Declaration and Platform for Action.	

	Trade	Gender	Milestones
1995 <i>continued</i>		Commonwealth Plan of Action on Gender and Development.	
1999	WTO summit in Seattle. Disrupted by protesters.	Optional Protocol to CEDAW adopted, allowing for individual complaints of discrimination.	
2000s 2000-05		Updates of Commonwealth Plan.	
2000		Beijing +5 outcomes document. Millennium Development Goals (MDGs), especially Goal 3 (promote gender equality and empower women) and Goal 8 (develop a global partnership for development).	
2001	WTO meeting agrees on the Doha Development Agenda, intended to start negotiations on opening markets to agricultural, manufactured goods and services. The stated intent is to make trade rules fairer for developing countries. Also recognises technical cooperation and capacity building (Aid for Trade) as an element.		
2003	World trade talks in Cancun, Mexico collapse over farm subsidies, access to markets.		
2004	Geneva talks achieve framework agreement on opening up global trade. US and EU will reduce agricultural subsidies, while developing nations will cut tariffs on manufactured goods.	Commonwealth Plan of Action for Gender Equality 2005-2015, especially Critical Area III: Gender, poverty eradication and economic empowerment adopted.	
2005	Pascal Lamy becomes WTO director-general. The sixth WTO ministerial conference in Hong Kong gives fresh impetus to negotiations. WTO task force created to operationalise Aid for Trade.	Beijing +10.	
2006	Talks in Geneva fail to reach agreement. Doha round suspended.		



- Use the timeline to spark off a group activity – for example, a discussion about how the milestone events relate to national or regional events
- Get small groups or pairs to fill in the third column with personal, national or regional milestones.



Key reading Unit 2 (on CD-ROM)

The key readings for the units are supplied on the accompanying CD-ROM.

The reading for this unit comes from *Gender and Trade: Overview Report* (2006) by Zo Randriamaro, a Cutting Edge Pack produced by Bridge (Institute of Development Studies at the University of Sussex). This report (from now on referred to simply as 'the Bridge Pack') 'aims to identify the possible ways and means for ensuring that the trade and gender equality agenda support each other'.

Section 2 'Gender, trade and development' has two parts:

- 1 Trade, trade policy and development
- 2 Why do we need to look at gender in the context of trade?

Section 5 'Gender, trade and development strategies' also has two parts:

- 1 Approaches to gender and trade
- 2 Gender and trade in development policy.

These sections provide further useful background reading for this unit.

Unit review

Use this review of what has been covered to assess your progress. Look again at the unit objectives and check if you can now do them. Look through your answers to the activities and see if you want to add to them.

This unit has covered the following main points:

- key questions about trade, gender and development
- short case studies to illustrate how trade, gender and development are interlinked and the impacts on the ground
- key concepts of gender and trade
- trade and gender milestones related to regional, bilateral or national milestones.

To recap, the learning objectives for the unit were to:

- identify ways in which gender, trade and development are linked and affect each other
- give working definitions of key terms relating to gender and trade
- get an overview of trade and gender milestones and agreements.

To review each unit

- develop a short quiz of 10–12 questions to check that participants have understood the main points and can remember key facts. Or get participants to test each other. Use the Unit review and learning outcomes to devise the questions.

Glossary of key terms

Here are definitions of the key terms (*Activity 2.4*). Remember that there is much discussion about the terms, and people define them in different ways and from different viewpoints.

GENDER

Gender *The socially constructed differences between women and men.*

These differ from one culture and society to another, change over time and define who has power and influence over what.

Sex *The biological differences between women and men.*

Gender relations *The social relationships between people (women and men, women and women, men and men) that reflect and reproduce gender difference as constructed in a particular context, society and time. Gender relations intersect with other social relations based on age, class, ethnicity, race, sexuality and disability.*

Gender policy, types of:

Gender blind *ignores different gender roles, responsibilities and capabilities. It is based on information derived from men's activities and/or assumes those affected by the policy have the same needs and interests.*

Gender neutral. *Not specifically aimed at either men or women and assumed to affect both sexes equally. However, it may actually be gender blind.*

Gender specific. *Recognises gender difference and targets either men or women within existing roles and responsibilities.*

Gender redistributive. *Seeks to change the distribution of power and resources in the interest of gender equality.*

Gender mainstreaming *The process of bringing a gender perspective into the mainstream activities of government (or an organisation) at the policy, programme and project levels.*

WID and GAD *Women in development (WID) is a development approach based on the assumption that women are 'left out' of development and need special projects to 'integrate' them. Gender relations and power inequalities are not addressed, and women's participation is often passive.*

Gender and development (GAD) is a development approach based on gender analysis and sees gender equality as a fundamental development goal, with women's empowerment and agency as key features of development strategy.

Gender balance *Equal or fair distribution of women and men within an institution or group, giving equality of representation*

Gender equality *Gender equality means women and men have equal rights and should have the same entitlements and opportunities. Equality is rights-based.*

Gender equity *Gender equity means justice so that resources are fairly distributed, taking into account different needs.*

Practical and strategic gender needs *Practical gender needs arise from the different material conditions of women and men, due to the roles ascribed to them by society. They reflect women's position in society, but do not include challenging it. (An example is the need for a clean water supply nearby.) Strategic gender needs relate to women's empowerment and to what is required to challenge the gender balance of power and control to achieve gender equality. (An example is the need for equal access to decision-making power.)*

TRADE

Economic globalisation *The growing economic interdependence of countries worldwide through increasing volume and variety of cross-border transactions in goods and services, free international capital flows, and more rapid and widespread diffusion of technology. (IMF definition)*

Trade liberalisation *Removal of obstacles to free trade, such as quotas, nominal and effective rates of protections and exchange controls.*

Privatisation *Transfer of ownership of state owned enterprises to the private sector.*

Protectionism *Advocacy of trade barriers, such as tariffs, and non-tariff barriers (e.g., quotas or health and safety standards) to restrict the import of goods and protect domestic producers and workers from competition.*

Free trade *When the international exchange of goods and services is neither restricted nor encouraged by government-imposed trade barriers.*

Fair trade *Fair trade is an alternative approach to conventional international trade. It is a trading partnership that aims at sustainable development for excluded and disadvantaged producers. It seeks to do this by providing better trading conditions, by awareness raising and by campaigning.*

Subsidies *Grants, low-interest loans and other forms of assistance that governments provide to industry – some permissible, some prohibited under WTO or other regulations.*

Tariff/ Non-tariff barrier *A tariff is a customs duty on an imported product at the time of import. Used for reasons of revenue, protection, or to ease/ rationalise use of limited foreign exchange.
A non-tariff barrier (NTB) is a measure other than tariffs used by governments to restrict imported goods, e.g., variable import levies, import quotas, labelling and package requirements, domestic content requirements.*

Market deregulation *The removal of government controls from an industry or sector to allow for a free and efficient market place.*

Export promotion *A strategy for economic development that stresses expanding exports, often through policies to assist them such as export subsidies. The rationale is to exploit a country's comparative advantage, especially in the common circumstance where an over-valued currency would otherwise create bias against exports.*

References

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Kabeer N and S Mahmud (2004b) 'Globalization, Gender and Poverty: Bangladeshi Women Workers in Export and Local Markets', *Journal of International Development*, Volume 16.

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3 The trade policy environment

This unit provides an overview of the trade policy environment – the social, political and economic context in which global trade takes place – and the broad gender impacts.

It will help you to:

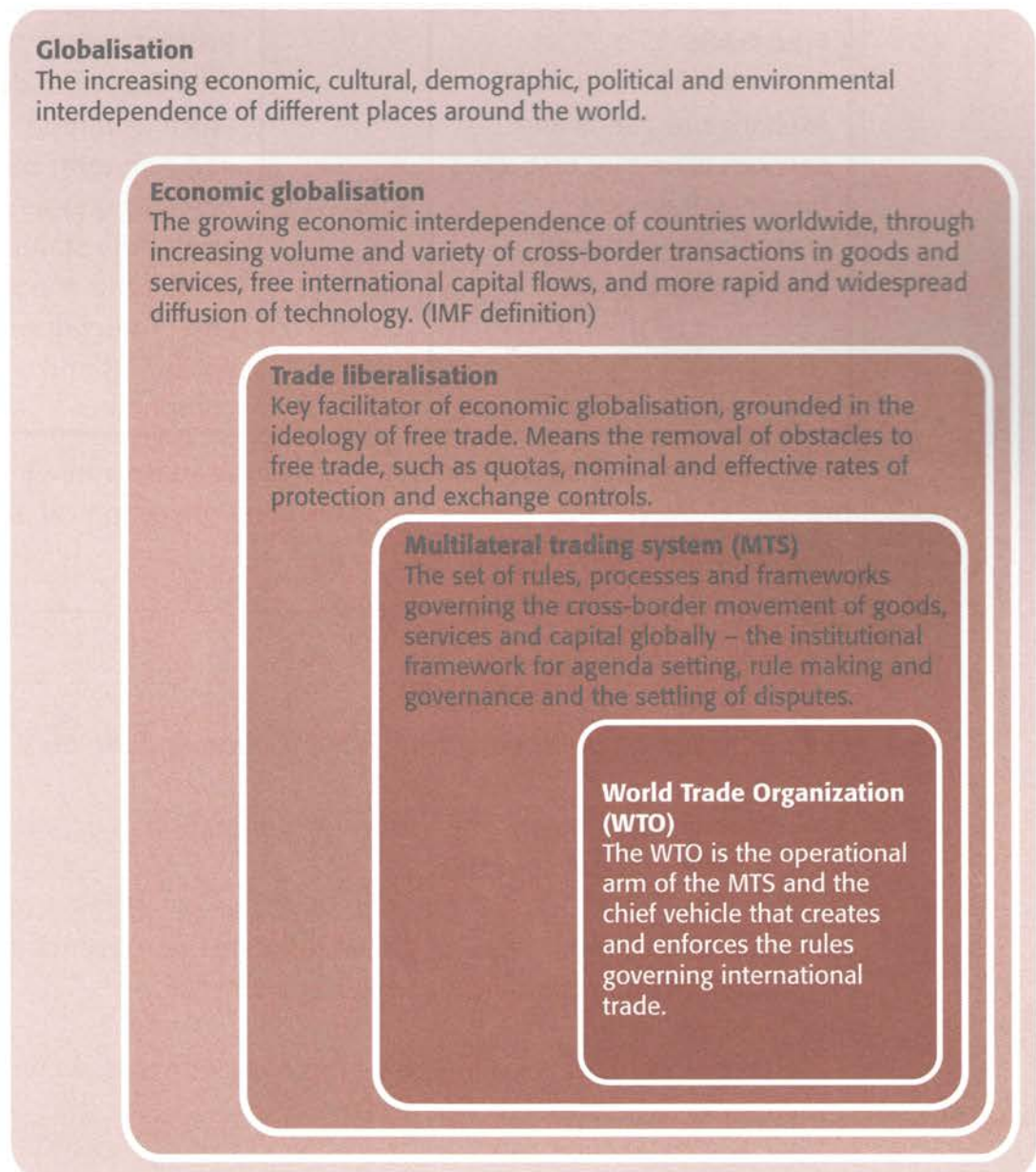
- describe the context in which trade takes place
- give examples of ways in which trade liberalisation has gender impacts
- start to identify ways of influencing the trade policy environment
- identify factors that may shape the trade policy environment in the future.

In this unit

The context
Gender and trade liberalisation
Getting gender on the agenda
Emerging issues

The context

Moving from the general to the specific, the context for the trade policy environment can be shown in a diagram like this.



There is more about the MTS and WTO in Unit 4 and more about regional and bilateral agreements in Unit 5.

Aspects of the trade policy environment

In trade policy-setting, there are two diametrically opposed ideologies: free trade and protectionism.

Free trade

When the international exchange of goods and services is neither restricted nor encouraged by government-imposed trade barriers



Protectionism

Advocacy of trade barriers (such as tariffs) and non-tariff barriers (such as quotas or health and safety standards) to restrict the import of goods and protect domestic producers and workers from competition

Most countries and interest groups prefer to be somewhere in between the two. However, free trade is the over-riding philosophical and ideological orientation of the MTS

Links between globalisation, trade liberalisation and the MTS

- 1 Globalisation means the increasing integration of economies into a more borderless world.
- 2 The 'bricks and mortar' of globalisation is the movement of goods, services and capital into and out of countries.
- 3 This movement is facilitated by the reduction and elimination of border measures.
- 4 The MTS, geared to trade liberalisation, provides the negotiation spaces to bring about this reduction and elimination.
- 5 The MTS promotes wider and deeper integration by:
 - decreasing tariffs
 - removing non-tariff barriers
 - pushing for 'behind the border' measures (i.e., changes internal to a country, not just relating to tariff and border controls) and supportive policies such as those relating to competition policy, harmonisation of product standards and protection of intellectual property rights.



Activity 3.1: Check your understanding

Imagine you have been asked to explain these questions to someone else.

How would you define the current dominant ideology of trade policy?

What is the MTS?

How does the WTO relate to the MTS?

How does the MTS promote economic integration?

If you can't answer the questions, look back at the unit so far.



- Ask participants to look for definitions of trade liberalisation and statements of trade liberalisation policy in your context. Their first step could be to do an internet search for trade liberalisation + name of country/region. A more sophisticated search would involve studying examples of trade policy documents or plans and relating them to the aspects discussed above.
- Choose a recent newspaper article about trade and analyse its use of terms or relate the content to the context and aspects outlined here.

Gender and trade liberalisation

Unit 2 introduced ways in which trade liberalisation impacts on gender inequalities. This section of Unit 3 continues this topic, exploring further the broad impacts. Unit 4 will look in more detail at impacts in particular sectors.

First, here are three short case studies to illustrate impacts of trade liberalisation. They are followed by a discussion of four important ways in which trade liberalisation may have social and economic gender impacts, then by an activity to help you examine the case studies.

Case study 3.1 illustrates the gender impact of the phasing out of the Multifibre Arrangement (MFA) in India – for example, on employment and wages.

Case study 3.1: The phasing out of the MFA in India

Accession to the WTO, phasing out of the Multifibre Arrangement (MFA) and liberalisation of capital and commodity flows characterise the environment facing many countries in Asia at present.

The expiry of the MFA in 2005 in particular is having a significant impact on the region. (The MFA came into force in 1974. A final version of it was the Agreement on Textiles and Clothing, which was to be implemented in four phases, starting on 1 January 1995 and coming to an end in 2005.) Some of the poorest countries in Asia, which benefited from the export quotas and developed textiles and garment industries under the MFA, are now facing challenges in sustaining textile and apparel production, while other countries like China, India, Indonesia, Pakistan, etc seem to have increased their exports to the United States and Europe. The Asian economies are involved in tough competition with each other to increase exports, which exerts pressure on wages, terms of employment, technology and form of production not only in the apparel and textile sectors, but also in other traded and non-traded sectors.

The manufacturing sector in India in the post-reforms period has not generated much employment, particularly in the organised sector. This is mainly due to the increase in the capital intensity of the sector. Though some employment has been generated in this sector, most of it is in the unorganised sector, managed through sub contracting and outsourcing. The textile and garment industry, which contributes significantly to national exports and national income, is important for employment generation. The expiry of the MFA is therefore important for the economy, as it can generate large-scale employment and enable the country to promote a labour-intensive export-based strategy for development.

India has several advantages so far as its textiles and garment industry is concerned. These include a strong multifibre base, the largest loomage



and second largest spindlage in the world, a wide range of production technology, a vast pool of skilled labour, and dynamic entrepreneurship as well as a flexible production system, a huge domestic market and a broad production base within the country. In short, it has, within the country, a good supply chain. However, the industry is also facing several constraints like power shortages, infrastructure gaps, fragmented production units, etc.

The government, as well as the industry, has taken several initiatives to fight these limitations and to promote exports. In fact, these initiatives have created euphoria and the industry is experiencing a boom period. It is growing rapidly along with its exports. The boom has brought about several changes in the characteristics of the industry as well as its labour hiring practices. Two major trends are observed in this context. On the one hand the industry is moving towards high value-added products, where the technology is improving fast, the average size of the unit is increasing, and labour productivity and wages are growing (though wages are not growing fast). On the other hand in low/ medium value products the industry is depending more and more on sub-contracting and outsourcing to home-based and non home-based units. The industry is decentralising here, and with cost-cutting measures the employment quality is declining fast in this segment.

Women, however, are losing in both these segments. Their share in employment is declining in the high value-added segment, as women do not usually possess the required skills. Their share is increasing in the lower segment, mainly in the unorganised sector, where the quality of employment is very poor. In other words, the textile boom is not benefiting women enough either in the value-added segment or in the unorganised segment.

Gender inequality in the labour market is reflected in all major labour market outcomes: employment and unemployment, industrial and occupational segregations, employment, wages and related benefits and access to improved skills, productivity and upward mobility. Data on the gender wage gap, which is an important indicator of gender inequalities in the labour market, show that this has increased in all the sub-sectors of the industry and in all the segments. The highest wage gap is in the organised formal sector, which is managed most professionally, and the lowest gap is in the unorganised home-based sector. In the handloom and handicraft sector, however, new models have emerged that have successfully combined the heritage, professional management, employment intensity and gender equity. These models are produced by NGO-managed production units like Fabindia, Desi, Anokhi, SEWA etc, who seem to be exporting on a large scale and promoting gender equity in the labour market in many ways.

SOURCE: HIRWAY, 2006.



The next case study describes some of the wider impacts of trade liberalisation and employment loss in the South African clothing industry – for example, on households, especially children, and the broader community.

Case study 3.2: Trade liberalisation and employment loss in the South African clothing industry

A report from South Africa sketches a vivid picture of the gendered impact of the adjustment costs of trade liberalisation on women in the clothing industry, illustrated through personal experiences. This material is drawn from interviews and focus group discussions conducted in 2003 among a random sample of 50 women clothing workers in the Western Cape who had lost their jobs. While this is not a 'representative' sample, the documented lived experience of these women gives us a compelling picture of the human cost of job losses and the additional burdens this places on the day-to-day lives of thousands of women and their families. Statistics alone cannot tell their story.

The picture that emerges shows clearly that retrenchment and liquidations have pushed women workers into deeper levels of poverty. It is also clear that labour markets exploit the weak position from which women enter the economy and reinforce gender inequality. As the profile of workers before loss of employment shows, female clothing workers are an especially insecure group. Many of these women were already battling to survive on their low wages, and many of them were the breadwinners in the household. They were already pooling resources and sharing basic living requirements with extended families. In many cases, their low wages also helped to support other dependants, in addition to their own children.

As a number of people are dependent on the clothing worker's income, the impact of job loss has a ripple effect on households, especially on children. This increases the burden on these women who also fulfil domestic and reproductive functions in the home. Tensions rise over food, money and space. Women who were once active players in the labour market often lose their independence along with their income. Job loss pushes them into new power relations with ex-partners, partners or husbands, parents and other members of their family. These women are not only financially disempowered, but can experience a diminished sense of worth and identity.

The ripple effect extends beyond the family and into the broader community as the clothing worker and her family become more dependent on others to provide their basic needs – for everything from food, money for transport fares, electricity, water and rent. Some women coped by moving in with family members to pool resources; others

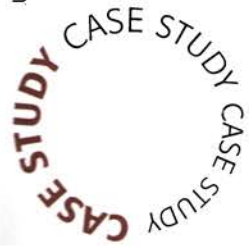
sent their children away to live with other family members. This has a direct effect on the social fabric of families and communities as parents are separated from their children. It is impossible to maintain healthy nutrition under these conditions as income losses curtail spending on food. This again builds reliance on family and community networks to get food. But these sources can be exhausted. Workers who had only been unemployed for two months were forced to ask neighbours for food, at times finding their request denied. With broad unemployment in South Africa at 40 per cent, more and more people are edging below the breadline, with nothing to share. Losing a job means losing access to a sick fund, and unemployed workers join the ranks of those who depend on overburdened and under-resourced state facilities.

Most of the women interviewed had not completed secondary education, irrespective of their age. This shows that the attainment of secondary school qualifications is as difficult for a younger post-apartheid generation as for their older counterparts. After job loss, even paying school fees for preschool, primary and secondary school children becomes a problem, and children will eventually have to leave school to help earn an income. In this way the cycle of low education and all its consequences is perpetuated for another generation.

Conflict and violence in communities are mostly the result of crime. With high unemployment crime becomes rife. This provides the context for the endemic proportions of sexual violence against women and children. Ironically, coping strategies that lead to overpopulated dwellings can also breed conditions for sexual assault.

The women in the study were forced to manage their lives after retrenchment with little financial or emotional support. There were no community outreach programmes or services to address their needs or anxieties. The vast majority were not aware of any state institutions that they could even approach for help. While some women were receiving state grants – mostly old age pensions – most women experienced great difficulty in accessing their unemployment payouts, despite the fact that they had contributed to the Unemployment Insurance Fund while employed. All the women cited unaffordable transport costs as a barrier to finding new employment and accessing food aid, health-care services or state benefits. Bureaucratic hold-ups in the payment of Provident Fund money made it even more difficult for women to maintain their livelihoods. It is particularly telling that although most women had lost their jobs only two months prior to the interviews, they were already struggling, with no 'safety-net' to fall back on.

Like thousands of other women in South Africa who have lost their jobs over the past decade, the women in this study are in an emergency



situation. The government, trade unions and groups representing the interests of women need to learn from this experience for their future involvement in trade policy-making, and take immediate steps to prevent these women, their families and communities from slipping into a poverty trap.

SOURCE: DEEDAT AND VAN DER WESTHUIZEN, 2004.

The third case study illustrates constraints that can prevent women benefiting from economic and trade opportunities.

Case study 3.3: Women in the Ugandan beekeeping value chain

Apiculture in Uganda contributes about 8 per cent to the national GDP and is an important seasonal activity that has traditionally been and has remained predominantly rural. Previously, behavioural taboos and cultural practices prevented women's participation, but the introduction of modern beekeeping, including modernised hives and technological practices, has enabled women to more easily enter the practice. This has resulted in quite remarkable gains on one level, such as the ownership of large enterprises by some Ugandan women. However, despite this, the majority of rural women working within the apiculture value chain of production are concentrated in the stages that provide the least opportunity for economic gain, and particularly, limited direct access to regional and intercontinental markets that lead to commercial and retail sales. Most commonly found within the first stage of the chain (obtaining production inputs), they are constrained by limited access to resources such as land and credit. Other stages, such as apiary management and product processing, also continue to be constrained by low levels of decision-making power, limiting their ownership over the entire production process.

SOURCE: UGANDA EXPORT PROMOTION BOARD, 2006.

Impacts

As the case studies have illustrated, trade policies affect women and men differently and therefore affect gender equality.

This section recaps some of the broad impacts.

The effects of globalisation from a gender perspective

The likely positive effects may include:

- acquisition of new skills
- higher income
- new opportunities for women and men
- wider reproductive choices.

The likely negative effects may include:

- more informalisation of work
- devaluation of women's work
- heightened gender stereotyping of employment
- increasing burden for women (paid and unpaid labour)
- further marginalisation of women.

As you will recall from Unit 2, research shows that trade liberalisation impacts on women's social and economic status in at least four important ways.

1 Employment

It affects women's employment status and may increase their income. However, without complementary measures (such as day care, access to transportation and ensuring proper health and occupational safety standards), it imposes a burden on women's time availability/ use as well as on women's health and morbidity.

2 Earnings and conditions of work

It has increased employment in the industrial sector and in commercial agriculture as well as offering work opportunities via subcontracting and home-based work in the manufacturing and services sectors. However, this is not always entirely benign or beneficial, as it tends to occur under poor conditions of work and pay and often entails violations of women's rights.

3 Markets and market share

It may open the way for cheap (subsidised) foreign goods to enter the local markets, dislocating women farmers and micro-entrepreneurs. Trade in second-hand clothing or prepared/ fast food replaces dressmaking and informal, small, local food establishments. However, women and men are also consumers and may benefit from cheaper goods.

4 Social expenditure and the care economy

It may lead to cuts in social expenditure (e.g., health care and education) when governments experience reduced revenue due to reductions in tariffs. Most of the programmes that are cut or eliminated are those that benefit women and girls. Governments often try to offset declining revenues with the imposition of other taxes such as value added tax (VAT), or user fees on basics such as water. These are more burdensome for women because of their responsibilities for household purchases.

When policy makers are not aware of existing gender biases and inequalities and how these affect women's access to resources and credit, trade policies may have counterproductive outcomes. For example, it has been argued that gender-based institutional biases that affect women's access to credit and training opportunities create inefficiencies. This may especially be the case with regard to agriculture and food production. This may ultimately result in export promotion schemes not having the desired outcomes.

The next activity asks you to analyse the impacts of trade liberalisation in the three case studies.

Activity 3.2: Analysing the impacts of trade liberalisation in the case studies

In the three case studies, note whether trade liberalisation has had social and economic gender impacts in the four ways outlined:

- 1 employment
- 2 earnings and conditions of work
- 3 markets and market share
- 4 social expenditure and the care economy.

Try to identify the specific causes of impacts in the boxes on the following page.

- Use local case studies/ examples to examine the cause and effect links of trade liberalisation impacts.
- If you selected local examples for Unit 2, study these in further depth in the light of the ideas in this unit.



The phasing out of the MFA in India

Impacts

Causes

The South African clothing industry

Impacts

Causes

The Ugandan beekeeping value chain

Impacts

Causes

Getting gender on the agenda: towards gender-sensitive trade policy

Think whether you agree with the following statements and whether they apply in your context.

There is now some official recognition, at national, regional and international levels, of the different impacts of trade liberalisation on women's economic and social status relative to men's. But this has not been translated into policy.

An important reason for the great silence around the gender dimensions of trade liberalisation is the belief among trade officials, negotiators and technical staff that trade policy is gender blind in its orientation and gender neutral in its effects.

Any attempt to alter the dynamics of trade liberalisation from the perspective of gender equality will not succeed unless it also challenges the way trade policy is formulated and decisions are made at all levels – sub-national, national, regional and multilateral.

These statements made about trade policy and trade liberalisation suggest that these are seen as gender neutral in their formulation and impact. But the many possible gender impacts are already becoming apparent.

Two main ways to get gender recognised and on the agenda are by:

- informing
- influencing policy.

This unit introduces these two approaches which are, of course, complementary.

Informing

This approach seeks to identify and provide evidence about ways trade liberalisation affects women and men differently. It recognises that there is a need for sound data to influence policy makers and negotiators.

Using gender analysis to integrate gender into trade policy

What is gender analysis?

'The conceptual and methodological framework for analysing, monitoring and evaluating the cultural, economic, social, legal and political relations between men and women in society. Within this framework there must also be recognition of the crucially important links between gender and other social relations such as class, race, ethnicity and North/ South relationships.'

(WILLIAMS, 2003, P. 201)

Gender analysis seeks to answer such questions as:

- In a given country, what are the gender impacts (current or future) of trade policy on production, employment, income and unpaid work?
- How do these relate specifically to import liberalisation, export promotion and market access?

Gender analysis is based on three basic facts about women and men:

- Their traditional roles affect how they can respond to trade opportunities and changes in household, community, market and state.
- They have different access to and control of assets and resources (material, social, technological, knowledge).
- They play different roles in production in different sectors of the economy.

Gender analysis also gives recognition to women's unpaid labour in social reproduction – in other words, it recognises that women's labour in the household and the community is central to all economies.

The key questions then to ask in analysis of trade and gender in any sector of the economy (e.g., agriculture, services, intellectual property, NAMA) are:

At the point when changes in trade policy take place:

- What are the different situations of women and men?
- What mechanisms and measures are built into the changes to take account of these differences?
- What are the expected results of the changes?

Later:

- Did these expected results happen?
- If not, what corrective mechanisms and measures are needed?

*Examples of gender analysis questions**Import liberalisation*

- How do cheaper imports affect local production as a source of livelihoods?
- Will eliminating or decreasing cross-border taxes on goods and services affect public expenditure and provision of social services?
- Do resources go into sectors dominated by women or men?
What are the implications at household level?

Export promotion

- How far do exports rely on the labour of women compared with men in commercial agriculture, export processing manufacturing and data entry/ coding?
- Does export promotion affect women's access to and control over resources such as land, credit and technical assistance as compared with men?
- What is the effect on women's and men's labour time?
- In manufacturing does it mean expansion of the informal sector and homeworking, with different effects on women's and men's labour?
- Does time spent on unpaid work decrease or increase?
- Are there health-related hazards created by employment?
- Will wages and income be sustainable in the long term?
- Is there gender stereotyping – for example, are 'women's jobs' less secure and less well paid than 'men's jobs'?

*Market access**At the level of international trade agreements*

- Do market access burdens (e.g., requirements on product quality, information on import and export procedures) have different gender impacts?
- Do those product sectors where women are important producers face lack of market access to a WTO market economy?

At the level of the domestic economy

- What gender differences are there in access to information about investment, grants and loans, market information, prices, taxes, etc?



Activity 3.3: Highlighting the relevance of gender analysis

Look again at the examples of gender analysis questions.

Underline two questions relevant to you and your work.

If none seem relevant for you, what would be important questions for your country/ region?

Use of gender analysis

This example shows how gender analysis can be used – in this case, for detailed analysis of specific sectors. It describes a study that looks at the impact of trade expansion on gender empowerment generally.



Case study 3.4: Export orientation of the economy and women's empowerment: empirical evidence from India

This study is an attempt to analyse the relationship between women's empowerment and export share in state domestic product. The study basically examines whether export-oriented change in the production structure can bring changes in the socio-economic condition of women in India.

This study shows that there is significant positive association between export share in state domestic product and the empowerment of women. The regression result indicates that the higher the share of exports in the economy, the higher is the empowerment of women.

However, if you remove education from the gender development index, the effect of trade liberalisation on gender development becomes insignificant, which indicates the crucial role of education in delivering holistic benefits from trade liberalisation.

Sector-specific case studies conclude that employment opportunities have increased in export-oriented sectors, especially for women workers. Average wages have improved. Sectoral analysis further indicates that integration into global markets does generate uncertainties for women, but these may be outweighed by net economic gains and distributional

effects. The macro indicators have demonstrated net welfare gains for women, but anecdotal evidence has also shown that global integration has had adverse consequence for women in several instances.

The paper analyses the impact of trade expansion on gender empowerment in India. It considers women's employment in India

- in terms of rural/urban employment
- by state
- by sectoral distribution of the female workforce in nine sectors (in which around 90 per cent of Indian women are employed) over two time periods: 1993/1994 and 1999/2000. The sectors are:
 - 1 agriculture
 - 2 livestock
 - 3 textiles and textile products
 - 4 beverages and tobacco
 - 5 food products
 - 6 construction
 - 7 petty retail trade
 - 8 education and research
 - 9 domestic services.

Through econometric analysis the study makes an attempt to analyse the relationship between women's empowerment in a composite sense and export share in state domestic product.

The following sectors are then discussed with empirical analysis at sectoral level:

- agriculture (and allied activities horticulture and fisheries)
- textile and garment industry
- food processing industry
- service sector and trade in services
- IT sector
- other services (hotels, education, health care).

SOURCE: JHA AND AHMED, 2006.



- Hold a group discussion or small group work to identify relevant questions for a local (country/ region/ sector) gender analysis.
- Ask participants to suggest areas for gender analysis.
- With advance planning, these activities can be continued and refined in the course of later units.
- See Unit 7 Tools for two gender analytical frameworks: the Harvard framework (# 5) and Longwe framework (# 6).

Influencing

This approach seeks to influence policy makers and negotiators. Here we focus on policy-making at national level.

Governance and the trade policy environment

Because of the assumption that trade liberalisation is gender neutral, gender has not figured much in trade policy discussions and agendas. This includes the issues of who decides and who is consulted in the decision-making process. It also involves issues around transparency and participation, accountability and democratic participation.

Again, think whether or not you agree with the following statements and whether they apply in your context.

To date gender has not been a significant variable in the agenda-setting, rule-making or enforcement of trade policy.

There is very little attempt to link gender equality objectives and gender mainstreaming with trade and export promotion areas.

How is trade policy made? How does it feed into trade policy negotiations? On the next page we give questions that might be put to someone responsible for trade policy-making at national level.

Questions for a policy maker

- 1 How is trade policy made at national level?
- 2 Whose are the critical voices involved in forming national trade policy?
- 3 How much do gender issues figure in trade policy-making discussions?
- 4 What do you as a trade policy maker need to know in order to integrate gender issues into negotiations?
- 5 What do you as a trade policy maker need to do in order to integrate gender issues into negotiations?
- 6 What kind of practical tools would be helpful for you?
- 7 How does national trade policy feed into international trade negotiations?
- 8 What are the opportunities and difficulties for trade policy makers in getting gender issues included in discussions and negotiations?

At national level, getting gender onto the agenda means:

- holding governments accountable for commitments to gender equality
- making gender analysis and a gender perspective an integral part of the trade policy-making environment
- ensuring coordination among sector ministries
- ensuring participation of national and regional gender machineries
- enabling global agencies and women's organisations to weigh in on the trade debate and women's voices to be heard.

Integrating gender into trade policy decision-making

Avenues for integrating a gender perspective and analysis into trade policy decision-making lie in:

- the emerging spate of impact assessments of trade agreements (along with the social and environmental impact assessment, a gender impact assessment has validity)
- the review of trade policy by the WTO's Trade Policy Review Division
- the explicit development focus of the Doha Development Agenda (DDA)
- the tremendous debate around public and essential services, which opens up the area of social justice and equity in the trade agenda
- advocacy for gender mainstreaming within the key sectors, ministries and inter-governmental fora that deal with trade policy
- technical assistance/ trade capacity-building programmes (WTO, UNCTAD, World Bank, etc)
- special and differential treatment (SDT) framework (provisions that give developing countries special rights)
- Aid for Trade integrated framework. Seen as a complement to the DDA and a way of making trade, development and growth fit together. Includes technical assistance, institution capacity building, infrastructure requirements and adjustment/ transition assistance.

There are five key issues relating to governance and trade policy-making at national level:

- agenda setting
- rule-making
- enforcement
- accountability
- critical voices.

The next activity explores the important questions each issue raises and asks you to answer them for your own context. This may involve some research.

Identify any gaps. Make notes about how you can find the information to fill those gaps, particularly in order to identify whose are the critical voices in the formulation of national trade policy.



Activity 3.4: Exploring the five key issues

As far as you can, answer the questions listed below:

Agenda setting

Who sets the agenda?

What and whose are the predominant values?

How is participation of different groups included in negotiations?

Rule-making

What is the basis for it?

What are the processes, formal and informal?

What are the procedures for ensuring fairness, democracy and accountability?

How are structural and other imbalances recognised and remedied?

What are the imbalances? What mechanisms exist to assess and correct these?

Enforcement

What are the mechanisms and processes for arbitration and enforcing judgements?

What are the processes for ensuring fairness, democracy and transparency?

Accountability

What are the processes to promote gender sensitivity in the design of trade rules?

What are the processes for monitoring day-to-day gender impacts?

Critical voices

Who are the critical voices in the formulation of national trade policy?

What is the gender distribution of trade delegations/ high level technical personnel in ministries of trade and missions in Geneva, regional secretariats and the WTO?

At national level, which ministries (and who in these ministries) prepare reports and take part in trade policy and related decision-making?

What is the role of women's/ gender machineries in these processes?

Are gender experts involved in discussions at all levels?

Now choose an example of trade policy-making (for example, a specific agreement) and note what you, in your present role, could do to influence it. (Look back at the policy maker questions and think especially about questions 4, 5 and 6.)



- With a group, do a collaborative activity to share participants' knowledge and experience to map out answers to the five key questions above about agenda setting, rule-making, enforcement, accountability and critical voices. Or, depending on the group, focus on one of the questions.
- Develop this activity to identify any gaps in information or understanding and plan the further research/ fact-finding needed to get the answers.
- Discuss and prioritise the possibilities for effective influencing.
- Identify the individuals who are 'critical voices'.
- Develop a role-play exercise about influencing trade policy. Use a case study/ current issue as the basis, letting participants take the part of different interests or individuals (e.g., trade minister, producer, WTO). Use the 'Questions for a policy maker' from above as a prompt.

See the first tool in Unit 7 Tools #1 Checklist: Trade policy development – bringing in gender issues.

Emerging issues

Here are two activities to encourage you to think about how the trade policy environment has changed over time and may change in the foreseeable future. You can decide how much time to spend on this, and how much depth to go into. The activities are easier to do in a group, but even if you are working alone, using the action guide as self study material, you can use them to stimulate your thinking.



Activity 3.5: Looking back and looking forward

First think back 20 years. What are the main factors that have shaped the trade policy environment in the last 20 years – and which of them could you have foreseen 20 years ago?

You might have identified factors like the following:

- end of the Cold War
- information and communications technology (ICT) developments, including internet
- emergence of China, India and Brazil as big players
- cheap air travel
- national and regional factors
- factors relevant for developing or developed countries.

Now try and spot similar factors that could shape the next 20 years (including some that may seem far-fetched).



Some possible factors you might have identified:

- rises in fuel prices make global trade in basic foodstuffs uneconomic
- advances in robotics make cheap manual labour redundant
- biotechnology advances
- climate change leads to major conflicts over water
- China and the US stop being friends
- feared bird flu epidemic materialises with decimation of world's population
- national and regional factors
- factors relevant for developing or developed countries.



Activity 3.6: Exploring the future

Now choose one of the factors you identified as shaping the next 20 years and use it to build a simple scenario, asking:

- How will this factor affect the trade policy environment internationally or locally?
- What will be its gender impacts?

Follow the steps in the box overleaf.

Steps

What is the factor you wish to explore? (e.g., rising fuel prices)

What now? Describe the current situation in relation to this factor, including gender aspects? (e.g., the political, economic, social or technological aspects of fuel supplies and prices)

What next? What are likely developments in relation to this factor (e.g., collapse of current trading arrangements for fuel), including gender impacts? Look at the next

5 years

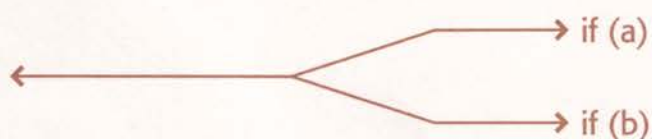
10 years

20 years

You can draw a timeline to illustrate the developments



You can add branching lines to indicate alternatives and develop those lines further (e.g., what would happen if (a) or (b)?)



Finally, describe

- What you think the scenario means for the main players involved in this story, with a particular focus on gender impacts.
- What you (your country, region, economic sector, organisation) could do to deal with the condition in the future(s) described.



- Adapt this scenario activity to make it more relevant to the particular context – for example, specify the factor to explore.
- With a group, develop more than one branch and then compare the resulting scenarios. Discuss the difference between probable futures and desirable futures and the kind of action needed to make desirable futures more likely.
- Organise a more complex scenario activity. There are a number of websites with information about scenario building exercises, e.g., <http://www.infinitefutures.com> or <http://eg.arizona.edu/futures>.



Key reading Unit 3 (on CD-ROM)

A reminder that the key readings are supplied on the accompanying CD-ROM.

Chapters 1 and 2 of *Gender Mainstreaming in the Multilateral Trading System* by Mariama Williams.

This is a handbook for policy makers and other stakeholders. The ideas in this unit are based on these chapters.

Chapter 1 'Multilateral and regional trading arrangements and globalisation' reviews the main features of the MTS and the links between it and globalisation, how the trade system is governed and issues of transparency and participation.

Chapter 2 'Gender and the Multilateral Trading System' examines the context for gender and trade, and the role gender plays in the governance of international trade at regional and multilateral levels.

Unit review

Use this review of what has been covered to assess your progress. Look again at the unit objectives and check if you can now do them. Look through your answers to the activities and see if you want to add to them.

This unit has covered the following main points:

- an overview of the trade policy environment and connections between globalisation, trade liberalisation and the MTS
- the impacts of trade liberalisation on gender
- approaches to getting gender on the trade policy agenda through informing and influencing
- thinking about the trade policy environment in the future.

To recap, the learning objectives for the unit:

- describe the context in which trade takes place
- give examples of ways in which trade liberalisation has gender impacts
- start to identify ways of influencing the trade policy environment
- identify factors that may shape the trade policy environment in the future.

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4 The multilateral trading system

This unit examines the multilateral trading system (MTS), how it operates and key areas covered – agriculture, services, intellectual property rights and non-agricultural market access.

It will help you to:

- describe the workings of the MTS, its institutions and the framework of agreements through which it operates
- identify the main sectors covered and the gender impacts in each
- relate all these to experiences of your own country/ region/ sector.

For each of the key areas discussed there is a short case study, a key reading and a checklist activity. You can focus on the area(s) most relevant to you or work through them all.

In this unit

The MTS at a glance
Services
Agriculture
Intellectual property rights
Non-agricultural goods
Other trade agreements

What?

What is the MTS?

- The MTS is rooted in the General Agreement on Tariffs and Trade (GATT).
- Since 1995 it has been overseen by the World Trade Organization (WTO), the system's operational arm.
- The WTO, mandated by its members, oversees and implements trade agreements and enforces the dispute settlement process.
- The MTS is facilitated by a network of bilateral, regional and quasi regional arrangements on aid, development and trade cooperation assistance. There are currently about 2,500 such arrangements in force. These include:
 - *the Lomé Convention (now the Cotonou Agreement) between the European Union and African, Caribbean and Pacific States (EU-ACP)*
 - *Economic Partnership Agreements (EPAs)*
 - *the African Growth Opportunity Agreement*

– *the Caribbean Basin Initiative (now the Caribbean Basin Trade Partnership Act-CBTPA)*

- The increasingly complex array of arrangements range from limited free trade agreements – such as the North American Free Trade Agreement (NAFTA) between Canada, Mexico and the United States – to the more integrated economic unit of the European Union.
- Regional arrangements sometimes drive the global trade liberalisation process.
- Key sectors are covered by agreements such as the AoA, GATS, TRIPS and NAMA (explained later in this unit).
- The 'most-favoured-nation' (MFN) provision requires WTO members not to discriminate among other WTO members; in other words, any trade benefit they give to one country must be extended to any other WTO member.

How?

How does the MTS work?

- Governance of the MTS means the institutional framework that makes, implements and oversees trade rules and practices.
- It includes the WTO, national trade machineries, regional trade agreements and mechanisms, plurilateral agreements and international financial institutions (e.g., the World Bank and International Monetary Fund (IMF))
- The WTO has
 - a ministerial conference at least once every two years
 - a General Council of all members
 - a Secretariat of 600+
 - working parties and informal meetings
 - technical capacity training programmes
- The practice is decision-making by consensus.

Why?

Why does the MTS exist?

- Free trade ideology is in the ascendant, with a belief in the primacy of the market and free flow of goods and services, commercialisation and privatisation.
- Trade liberalisation means fewer restrictions on cross-border flow of goods and services.
- The aim of the MTS is to provide a systematic and orderly process for international trade.
- It offers a framework for negotiating trade rules, based on the exchange of concessions around market access across a wide range of countries.

Who?

Who are the players?

- National States are both actors in and facilitators of the system. As at December 2006, 149 countries were members of the WTO, with 30 more negotiating membership.
- Other players are
 - importers
 - exporters
 - investors
 - workers (paid/ unpaid; formal/ informal)
 - consumers.

The MTS at a glance

The MTS facilitates the movement of goods, services and investment, which are the bricks and mortar of globalisation

Where?

Where does the MTS operate?

- The MTS is about operation and interaction among national markets at the global level, but the rules are implemented locally.
- It has influence at local level and impacts on the functioning of States, businesses, families and individuals.



Activity 4.1: Explaining the MTS

Imagine a colleague has asked you for a simple explanation of the MTS. Based on the information above, your reading and your own experience, fill in your side of this conversation.

You may also refer to Units 2 and 3 and draw in other information relevant to your country/ region.

Please tell me – why do we need an MTS?

How does the WTO fit in with the MTS?

What part do national states play in the MTS?

Who runs the MTS – who decides?

Governance of the MTS raises some important issues – and in turn each of these raises the questions who? what? how?

- agenda setting (who sets the agenda? what items are on the agenda? how is the agenda decided? and so on)
- rule-making (who makes the rules, etc)
- addressing structural and other imbalances
- enforcement
- accountability
- addressing gender issues.

You may notice that these are much the same issues raised in Unit 3 about governance and trade policy-making at national level.



- Get people to work in pairs or small groups and make short presentations to explain what the MTS is and how it operates.
- Get two volunteers to do a mock television interview in front of the group, based on Activity 4.1.
- Have a general discussion to share information and ideas about the importance of MTS governance issues and the who/ what/ how questions concerning:
 - agenda setting
 - rule-making
 - addressing structural and other imbalances
 - enforcement
 - accountability
 - addressing gender issues.

Sectors

The rest of this unit looks at how the MTS operates – the implementation of WTO agreements and the gender impacts in key sectors:

- agriculture
- services
- intellectual property rights
- non-agricultural goods

For each sector there is a short case study, a key reading and a checklist activity. You can focus on the sector(s) most relevant to you or work through them all.

Agriculture

The Agreement on Agriculture (AoA) was established in 1994 under the umbrella act establishing the WTO and came out of the Uruguay Round of negotiations 1986–1993. It called for a reduction in agricultural export subsidies, reduced domestic support to farmers and lower tariffs on imports of agricultural products. The Doha Development Agenda (DDA) of 2001 aimed to address continued imbalances in global agricultural trade. The round of talks on the DDA was suspended in July 2006.

The questions to think about in relation to agriculture are:

- What is women's contribution to agriculture?
What is the gender-based division of labour?
- What are the gender impacts of trade liberalisation?
- What are the agriculture-related features of relevant trade agreements?
- What are the implications and opportunities?

The following case study looks at the employment conditions of women in Kenyan horticulture, particularly in relation to international codes of conduct.

Case study 4.1: Kenyan flower production

Codes of conduct covering employment conditions of Southern producers have gained popularity over the past decade. In African horticulture, employers have come under increasing pressure to adopt codes coming from supermarkets, importers, exporters and trade associations. Women constitute the majority of workers in African export horticulture; however, they are also more likely to be employed in temporary and insecure jobs.

In Kenya horticulture is the fastest-growing sector of the economy. This performance is mainly attributed to the export of cut flowers, the vast majority of which go to European markets. Seventy-five per cent of the employment in the cut flower industry is female, and over 65 per cent of the workers are employed on a temporary, seasonal or casual basis. Legally, Kenyan employers are required to promote casual or temporary workers to permanent status after eight months, but employees are often found returning year after year on a renewed temporary contract. Women in particular suffer from this legal loophole as a result of gender discrimination in Kenyan employment embedded in social norms that consider women more compliant and better suited to certain types of horticultural work (such as picking and packing), coupled with perceptions that women's income is supplementary, rather than central, to household well-being.

The main codes of conduct operating in the Kenyan context are the Northern sectoral code Milieu Project Sierteelt and the Southern sectoral



codes of the Kenyan Flower Council. Also on the increase is the use of the German-based Flower Label Programme, drawn from the International Code of Conduct for Cut Flowers developed by non-governmental organisations (NGOs) and trade unions in Europe. However, while producers found codes to be useful management tools, and there has been some improvement in areas of health and safety and other areas, major concerns over worker conditions – particularly for women – still persist. Interviews with workers found that only 22 per cent were aware of the existence of the codes, with even fewer aware that they pertained to workers' rights, and only 31 per cent of non-permanent workers had a signed, written contract. Despite many codes of conduct cautioning against the use of 'rolling contracts', many employers continue to use them as means of avoiding the additional costs associated with permanent employment.

The vulnerability of such non-permanent employment also leads to links with other unethical conditions, such as the obligation to work overtime (often excessively so) as a condition of employment, miscalculated wages, or dismissal or lack of contract extension due to pregnancy. The latter form of gender discrimination contravenes most codes and yet appears to be common practice. In the area of sick pay, medical care and childcare, women are further disadvantaged as these are typically not covered by codes. Non-permanent employees were also found to be more prone to verbal and occasionally physical abuse, dismissal without just cause, wages being docked as a disciplinary measure, corruption and favouritism. Fear of non-renewal of their contracts prevented complaints, and with women being under-represented in both trade unions and workers' committees, avenues for addressing these issues are limited or non-existent.

Despite positive steps taken by producers in the wake of the ethical trade advocacy by NGOs and movements such as the Ethical Trade Initiative, problems persist for female flower workers through both a lack of comprehensive social chapters within the codes that address the gendered nature of employment inequalities in the industry, and the lack of proper implementation of those relevant codes that do exist. One encouraging way forward that developed in 2002 was the spearheading of a campaign by local civil society organisations in response to continuing poor working conditions on Kenyan flower farms, spawning a series of articles in the Kenyan press. These activities generated concern about the reputation of the industry in overseas markets, and were responsible for bringing together a range of stakeholders to engage in dialogue on the labour practices. A Steering Committee – the Horticultural Ethical Business Initiative (HEBI) – was formed to guide social accountability in the horticulture sector and comprised members from government, NGOs and trade associations/ employers. In 2003

HEBI was registered as a legal entity and developed a multi stakeholder approach that has led to a major impetus through trans-national alliances of NGOs and ethical consumer groups. Participatory social auditing is an integral function of HEBI. Further initiatives along these lines are needed to transform what has been to date a largely gender-neutral approach into one that incorporates the gendered needs of employees in Kenyan horticulture.

SOURCE: SMITH ET AL, 2004. ADDITIONAL INFORMATION ON HEBI FROM OPONDO, 2005.



Activity 4.2: Checklist on agriculture, trade and gender

This activity is to help you check your grasp of the agriculture, trade and gender issues and relate them to your own country/ region.

In the box opposite is a selection of statements relating to the gender impacts on agriculture. For your country/ region, mark them Yes/ No/ Don't know (information not available). If your answer is 'Don't know', note where you could get the answer.

Add any further statements you think are particularly relevant for your context.



Key reading Unit 4a (on CD-ROM)

Garcia, Z and J Nyberg (2004) 'Agriculture, Trade and Gender' in Tran-Nguyen, A and A Beviglia Zampetti (eds) *Trade and Gender: Opportunities and Challenges for Developing Countries*, UNCTAD, Geneva, pp. 77–121 (Chapter 3).

This reading covers:

- 1 contextual information with a brief review of women's contribution to agriculture
- 2 gender implications of trade liberalisation by analysing the experience of selected developing countries
- 3 the main agriculture-related features of trade agreements, both multilateral and regional
- 4 the main implications of agricultural trade for small-scale farming, the opening up of economic opportunities for women and other gender aspects
- 5 conclusions and recommendations.

The section on agriculture in the Cutting Edge Pack *Gender and Trade* (pp 20–23) is also a useful short introduction.

	Yes	No	Don't know
1 Women tend to dominate in the agricultural sector.			
2 Women mainly produce domestic staples; they are more involved in small-scale trade of domestic food.			
3 Local farmers are pushed out of domestic markets by the dumping of cheap subsidised food imports. Falling prices mean it costs more to produce the crop than it is possible to sell it for.			
4 Removing state support to the agricultural sector – including extension services, subsidies for inputs and credit – has marginalised poor producers and cut their access to productive resources.			
5 Impacts disproportionately affect women because of their roles as both producers and managers of food security in households.			
6 Trade policies that promote cash crops and prioritise export-orientated growth mainly benefit men, who have overall responsibility in this area.			
7 Gender inequalities in access to and command of productive assets such as land and credit, or storage and transport facilities, tend to constrain women's benefits from such policies.			
8 Women receive only a small percentage of the credit granted to small farmers.			
9 Women often work as unpaid workers on family plots and in cash-crop production controlled by husbands or other male family members, without control over the proceeds of their work.			
10 Women consumers in cities benefit from the cheaper foodstuffs available because they are the net buyers of food.			
11			
12			

Training suggestions appear at the end of the unit.

Services

The services sector has grown enormously during the last decade and is becoming a major economic sector in many developing countries. Activities it covers include:

- advertising
- audio-visual services
- banking and finance
- communications
- construction
- data processing
- education
- environmental services
- health-care services
- insurance
- professional services
- retail and wholesale trade
- transportation
- tourism.

It is also part of the core infrastructure of a country and includes transportation, telecommunications, utilities and essential services such as water and energy.

Services are incorporated into the MTS under the General Agreement on Trade and Services (GATS). This was negotiated in the Uruguay Round and came into force in 1995.

The agreement defines four ways (or 'modes') of trading services:

- Mode 1: services supplied from one country to another (e.g., international telephone calls), officially known as 'cross-border supply'
- Mode 2: consumers or firms making use of a service in another country (e.g., tourism), officially 'consumption abroad'
- Mode 3: a foreign company setting up subsidiaries or branches to provide services in another country (e.g., foreign banks setting up operations in a country), officially 'commercial presence'
- Mode 4: individuals travelling from their own country to supply services in another (e.g., domestic workers or health-care professionals), officially 'presence of natural persons'.

Modes 1 and 4 are regarded as the main ways for increasing women's participation in the international trade in services. Gains from these two modes could make a significant contribution to achieving the Millennium Development Goals (MDGs).

Tourism is one service export sector that does usually receive attention in developing countries and their national strategies. The following case study examines gender dimensions of tourism in Barbados and the impact of trade liberalisation.



Case study 4.2: The Barbados tourist industry: Gender dimensions

Barbados is the most easterly of the Caribbean islands. During the 1950s the government, in an effort to diversify from its dependence on sugar, began to develop its tourism industry, which eventually surpassed sugar and manufacturing in economic importance. Tourism currently plays the lead role in Barbados' economy and therefore has the potential to be the major vehicle for sustainable development.

The tourism industry in Barbados has impacted significantly on the lives of the population by transforming economic activities. In doing so it has, in most cases, expanded the opportunities available to women and diversified the employment patterns of men.

Employment

During the pre-independence period, female economic activity was primarily concentrated in the sugar-based agricultural sector, small farming, self-employment as seamstresses, vending, retail trade and the care economy. The growth of tourism has opened new employment opportunities for them and has contributed significantly to reducing poverty levels. Data from the Barbados Statistical Service informs that in 2004, of a total labour force of 12,200 persons employed directly in tourism, women comprise 59 per cent compared to 40.1 per cent men. In keeping with global trends, men dominate in the upper employment levels as managers, professionals and technical persons accounting for 53 per cent of this category. In the middle sector, women exceed men significantly, making up 68 per cent – primarily in clerical positions. In the lower sector, women make up 48.3 per cent. Males dominate as machine operators (laundry machines and gardening equipment) and females dominate as elementary workers (maids, waitresses). Tourism therefore conforms to the international position as a significant employer of women.

Social relations

Women in the lower end of the tourism sector are generally employed as casual, part-time and seasonal workers. Again, in conformity with global trends, women are used as sex objects within the industry. They are expected to be attractive and accommodating to male customers. In addition, they are further portrayed in a stereotypical way in brochures and other promotional materials.

There have been some positive developments. The increased employment opportunities have created a sense of independence and have empowered women to negotiate for and enforce their rights within the family. Their increasing independence from their male partners has made their bargaining position stronger and has equipped them with a

say in the critical decisions that shape their future. The advancing status of women generally has seen a parallel shift in the activities of men in areas that were previously dominated by women. These include the manufacture and sale of craft, other forms of vending and their personal and active involvement in the tourist sex trade.

Educational opportunities

The growth of the tourism industry has led to the establishment of educational programmes to meet the needs of that sector. Registration for these programmes is dominated by women, and the qualifications offered have facilitated limited advancement of women to middle management and upper management positions. However, the educational opportunities available have done little to alter the horizontal and vertical segregation of labour in the tourism industry. The typical gender pyramid of men in managerial positions and few career development opportunities available to women remain prevalent and have only realised very slow change.

Entertainment and social services

Entertainment services within the industry have traditionally been dominated by men. Musicians performing on the hotel circuit are predominantly men with the women's role in this sphere being largely confined to limbo dancing and other not so subtle sexually oriented activities like striptease and exotic massage. Women also make up a large complement of dancers and it is only through this activity that their numbers have brought them as a group to rival men in terms of numbers performing in this sector. Again, it is noteworthy that their pay is considerably less for this activity than males who are employed in other entertainment activities.

In the area of providing security services for the industry, men again predominated initially. There has, however, been a gradual shift in the employment patterns with more women entering this sector as private security officers and in the local police force. Their numbers have also increased dramatically in the immigration and customs services, but the typical gender pyramid still applies as they occupy the lower rounds of employment in these sectors.

Community tourism

This activity has been least developed in Barbados when compared to other popular tourist destinations. Is it because women stand to benefit more from this activity? As a more recent addition to the tourism product, the most popular example is the Oistins Bay Garden where activity is concentrated on weekends. In this fishing village, tourists patronise food stalls that are owned largely by women. There are also plans to develop a community craft enterprise with the aid of the private sector on the

scenic east coast where female vendors currently dominate the sale of craft items in the environs of a community centre. Community tourism as an income generator has presented further opportunities for women, who in response have had to alter their traditional roles in communities by generating independent income and becoming a 'leader' or a businesswoman.

Opportunities/constraints

Tourism has evidently expanded economic opportunities for both sexes and has facilitated a shift in employment patterns. Opportunities have arisen as event planners, cosmetologists, baby-sitters, nightclub, food services and water sports operators, and taxi drivers, among others. From a gender perspective though, the opportunities created have been filled according to traditional gender expectations, with women gravitating to those activities that they are deemed suitable for and men in positions that conform to traditional patterns and that tend to attract greater returns.

SOURCE: HOLLINGSWORTH, 2006.

Two more short examples from the Caribbean illustrate different impacts in the services sector.



Case study 4.3: Household workers in Jamaica

The household/ domestic service sector consists mainly of unskilled women. These are poor women and many are heads of households. This sector can expand based on a downturn in the economy – for example, the withdrawal of foreign direct investments (FDI) – or it can contract based on opportunities in other areas such as overseas employment or outward migration. FDI and overseas employment opportunities therefore are two factors that affect household workers in Jamaica.

The Jamaica Household Workers Association (JHWA) is a non-government, voluntary, women's organisation that was established in 1991 to represent the needs and interests of female household workers. The JHWA was designed to provide opportunities for support at the local, regional and international levels.

Household/ domestic workers are involved in trade: they trade their services. Many who migrate continue in the service. With the advent of the CARICOM Single Market and Economy (CSME), the JHWA has limited opportunities for trade and export promotion. Household workers will not be able to benefit as they are poor and also not listed in the 'free movement of persons' category.

SOURCE: WILLIAMS, 2006.



Case study 4.4: Emigration of nurses from the Caribbean

A growing shortage of nurses in developed countries and emerging gaps in the public sector has led to enhanced international recruitment of nurses by developed nations from countries such as those in the Caribbean. Push factors associated with weaknesses in the public health systems of developing countries have been a contributing factor to this out-migration. They include inadequate remuneration and benefits, unfavourable working conditions and insufficient training and professional development. Despite increased international initiatives to control recruitment and to stop poaching from already drained countries, this has only had a temporary impact, and fast track immigration procedures have been put into place in the United Kingdom and the United States.

SOURCE: UNECLAC, 2005.



Activity 4.3: Checklist on gender impacts of trade in services

Here is a selection of statements relating to the gender impacts of the liberalisation of trade in services. For your country/ region, mark them Yes/ No/ Don't know (information not available). If the answer is 'Don't know', note where or how you could get the answer. Add any further statements you think are particularly relevant for your context.

	Yes	No	Don't know
1 The services sector has experienced an explosive growth during the last decade.			
2 The majority of women paid workers are concentrated in services.			
3 Women tend to predominate in micro or small service firms – in particular as service suppliers for domestic consumption.			
4 In 'modern services', women dominate the data entry segment for processing and coding information (back office operations) for credit cards, airlines, mail orders and rail systems.			
5 Many of the services involve working for a foreign service firm – particularly in the financial sector (banking). Here women may earn relatively high wages and increase their status within their families and communities.			
6 Services liberalisation has not reduced the gender wage gap, or changed the gender-based hierarchy of occupations or the proportion of casual jobs.			
7 Under mode 4, women are usually more involved in labour-intensive services (e.g., care, health, domestic and social services) than in professional services (e.g., accountancy, engineering and management).			
8 Under mode 4, women may move abroad for work if there are no jobs in the domestic economy, thereby contributing to poverty reduction.			
9 Loss of trained womanpower results in shortages of skills and 'brain drain' that negatively affect the provision of services domestically (e.g., health care).			
10 Under mode 4, women make a significant contribution to remittances, because they are likely to save more and send more of their earnings home. This can be a source of empowerment for women and can challenge traditional gender relationships.			
11			
12			

Training suggestions appear at the end of the unit.



Key reading Unit 4b (on CD-ROM)

Riddle, D (2004) 'A gender-based analysis of international trade in services: The experience of developing countries', in Tran-Nguyen, A and A Beviglia Zampetti (eds), *Trade and Gender: Opportunities and Challenges for Developing Countries*, UNCTAD, Geneva, pp 175–221 (Chapter 6).

This reading has eleven sections and there are specific policy recommendations at the end of each.

- 1 Potential links between liberalisation of trade in services and development, given the central role of services in all economies, with many of the services suppliers being women
- 2 Common misconceptions about GATS and the need to be strategic in negotiations
- 3 Issues related to small service suppliers
- 4 Data from 12 countries at different levels of development – concludes that there is no reason to believe that further liberalisation of trade in services will automatically be either of benefit or harm to women
- 5 The invisibility of services in general within policy environments and the consequences for women
- 6, 7 and 8 Implications for women as business owners, workers and consumers
- 9 Biases in development programming regarding services and women entrepreneurs
- 10 Suggestions for gender-sensitive approaches to GATS negotiations and implementation
- 11 Conclusion: need for developing country governments to address gender issues in domestic regulations, market entry requirements and requests of trading partners.

The section on services in the Cutting Edge Pack *Gender and Trade* (pp 24–28) is also a useful short introduction.

Intellectual property rights

The WTO's Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS), negotiated in the 1986-1994 Uruguay Round, introduced intellectual property rules into the MTS for the first time.

The areas covered by the TRIPS Agreement are:

- copyright and related rights
- trademarks, including service marks
- geographical indications
- industrial designs
- patents, layout designs (topographies) of integrated circuits
- undisclosed information, including trade secrets.

The agreement covers five broad issues:

- 1 how basic principles of the trading system and other international intellectual property agreements should be applied
- 2 how to give adequate protection to intellectual property rights
- 3 how countries should enforce those rights adequately in their own territories
- 4 how to settle disputes on intellectual property between members of the WTO
- 5 special transitional arrangements during the period when the new system is being introduced.

As in GATT and GATS, the starting point of the intellectual property agreement is basic principles. And as in the two other agreements, non-discrimination features prominently: national treatment (treating one's own nationals and foreigners equally), and most-favoured-nation treatment (equal treatment for nationals of all trading partners in the WTO). National treatment is also a key principle in other intellectual property agreements outside the WTO.

The TRIPS Agreement has an additional important principle: intellectual property protection should contribute to technical innovation and the transfer of technology. Both producers and users should benefit and economic and social welfare should be enhanced, the agreement says.

The TRIPS Agreement has impacts on public health, agriculture and biodiversity, traditional knowledge and reproductive health (for example, in terms of access to fertility control methods and maternity care).

Under the 'Doha waiver', agreed in 2003 and adopted in 2005, WTO members agreed on legal changes that will make it easier for poorer countries to import cheaper generic medicines made under compulsory licensing if they are unable to manufacture the medicines themselves.

Case study 4.5: TRIPS and gender linkages in India

There are fears that the design, planning and implementation of TRIPS in India would worsen the gender asymmetry in terms of accessing affordable health care, nutrition and rights over community knowledge systems. At one level, the granting of monopoly rights serves to enhance the costs of products and services, especially those related to medicines. At another level, TRIPS, by extending legal recognition to only individual rights, also excludes protection to community-based knowledge systems where women have a critical stake, thereby ignoring both their economic significance and contribution. Taken together, the implementation of the TRIPS agreement is likely to impact adversely on women's rights to affordable health care, nutrition and property.

It has been estimated that 38 per cent of the 5.2 million people living with HIV/AIDS in India are women. Women constitute nearly 47 per cent of the cancer burden. Approximately 67 per cent of women in the age group 13–50 are suffering from anaemia. It has been found that though women in India report more illnesses with an increase in income (this is primarily because reporting of morbidity increases with an improvement of standard of living), treatment of the disease does not show a corresponding trend. As the National Sample Survey shows, financial constraints and lack of affordable medical care are the chief factors contributing to this. In addition the same women are more susceptible to diseases such as gynaecological disorders, cancers and tumours and diabetes mellitus. Maternal and perinatal conditions constitute nearly 11.6 per cent of the disease burden.

Effective drugs for the treatment of anaemia are out of reach for most poor women. In addition, existing prices of breast cancer treatment drugs, such as endoxane or melphalan, are in the range of approximately \$3–\$43. Clearly, once the product patent regime is in operation, these prices would climb further by eliminating generic competition and creating monopoly rights over new drugs and new vaccines. Thus, for instance, a patent on the new vaccine for cervical cancer would effectively put it out of reach for poor women.

An important challenge relates to the complex linkages of the TRIPS Agreement with food production, food security and nutrition in developing countries. It is believed that Article 27(3)(b) of the TRIPS Agreement, permitting patents on seeds and micro-organisms such as algae, bacteria and fungi, would increase the prices of seeds and fertilisers while restricting traditional exchange, use or sale of seeds by farmers. Increasingly, women farmers access farming inputs from the market and, given existing disparities between women and men's access to cash and credit, women farmers would undoubtedly face a greater risk of falling into chronic indebtedness.

It is feared that the TRIPS Agreement would lead to increasing privatisation of genetic resources and agricultural knowledge. Protection of plant varieties (PPV), essentially articulated in terms of the rights of commercial breeders, will affect the access of women farmers to germ plasm and scientific knowledge. Further, with an increased emphasis on monoculture, PPV would undermine conservation of biodiversity and sustainability concerns with negative consequences for local food security, including nutrition.

It is well known that women have been at the forefront in preserving biodiversity in many communities for centuries. The international community has recognised the close and traditional dependence of many indigenous and local communities on biological resources, notably in the preamble to the Convention on Biological Diversity, which has been ratified by 178 countries since 1992. The Convention also recognises the contribution that traditional knowledge can make to the conservation and sustainable use of biological diversity, two of its primary objectives. It addresses the role of both women and local communities in meeting these objectives. The TRIPS Agreement does not accord recognition of, and compensation for, traditional and local knowledge among women and men farmers.

SOURCE: CONTRIBUTED BY KM GOPAKUMAR, RESEARCH OFFICER, AND BIPLOVE CHOUDHARY, CENTRE COORDINATOR, CENTRE FOR TRADE AND DEVELOPMENT, NEW DELHI, INDIA.



Activity 4.4: Checklist on the gender impacts of TRIPS

On the next page is a selection of statements relating to the gender impacts of TRIPS. For your country/ region, mark them Yes/ No/ Don't know (information not available). If the answer is 'Don't know', note where or how you could get the answer.

Add any further statements you think are particularly relevant for your context.

	Yes	No	Don't know
1 Little research has been done into the gender dimensions of both the public health aspect of TRIPS and the impact on traditional knowledge, food security, sustainable agriculture and transfer of technology.			
2 The TRIPS agreement has been contested by governments and civil society because it relates to areas (patents, trademarks, trade secrets, copyrights and breeders' rights) that used to be the subject of national legislation.			
3 TRIPS has detrimental impacts on vital aspects of human life and rights such as public health, agriculture and biodiversity, traditional knowledge and technology transfer.			
4 IPR legislation is drawn up in the context of structural gender inequalities. These affect access to land, property rights, credit, extension services and technology. So it will have significant impacts on gender relations and women farmers, entrepreneurs, researchers and consumers.			
5 As poor women make up a large percentage of subsistence farmers, they are disproportionately affected by reduced access to seeds, farm inputs and plants through the patenting of seeds and biological resources.			
6 Women are disproportionately affected by the use of genetically modified organism (GMO) technology for agricultural policies.			
7 The mobilisation of women and small-scale farmers is key to the development of a model of legislation for the protection of farmers' access to seeds.			
8 TRIPS has critical implications for women in terms of access to medicines for their specific health needs (for instance, reproductive health and maternal mortality).			
9 Pregnant women should be given preferential access to AIDS drugs, which would require the effective application of the Doha waiver, together with gender-sensitive national drug procurement and supply systems.			
10 Social justice concerns must play a part in the revision of patent and IPR laws, recognising the role, contribution and constraints of women farmers to improve women's access to seeds, credit and technology.			
11			
12			

Training suggestions appear at the end of the unit.



Key reading Unit 4c (on CD-ROM)

Gehl Sampath, P (2004) 'Exploring the Relationship Between the WTO Agreement on Trade-Related Aspects of Intellectual Property Rights and Gender', UNCTAD Publication of the Task Force on Gender and Trade, New York and Geneva, pp 251–291.

This reading summarises the main provisions of the TRIPS agreement, which aims to set out 'effective and adequate protection' of the intellectual property required for global trade. It highlights some of the impacts of the agreement on developing countries, notably its potential impacts on whether medicines are available and affordable. It also looks at the intellectual property protection of life forms, which has caused controversy between developed and developing countries in two main areas: first, the protection of traditional knowledge relevant to medicinal products and research; and second, the protection of plant varieties, agricultural biotechnology and the rights of farmers in developing countries.

Considering the gender-related concerns of TRIPS, the chapter explores ways in which the impacts of the TRIPS agreements may be felt by women more than men.

Section 1

The impact of the TRIPS agreement on access to medicines in general, and on women in particular

1.1 factors that influence price rises

1.2 whether these price rises are likely to affect women more than men, and if so how

1.3 policy requisites to ensure gender equity in different countries

Section 2.1

The impact of TRIPS on agriculture

2.2 the important role that women play in agriculture in developing countries

2.3 the impact of these changes on women and ways national governments can deal with them

Section 3

Conclusions and recommendations.

The section on TRIPS in the Cutting Edge Pack *Gender and Trade* (pp 23–24) is also a useful short introduction.

Non-agricultural goods

At Doha, ministers agreed to initiate negotiations to further liberalise trade on non-agricultural goods. The Negotiating Group on Market Access was created in early 2002. The negotiations aim to reduce or eliminate tariffs and non-tariff barriers for non-agricultural goods, in particular on products of export interest to developing countries.

Non-agricultural market access (NAMA) refers to all products not covered by the Agreement on Agriculture (AoA), sometimes referred to as industrial products or manufacturing goods. In practice it includes products such as automobiles, beverages, chemicals, cement, glass, leather, plastic, fuels, mining products, fish and fish products, and forest products. Over the past years, NAMA products have accounted for almost 90 per cent of world merchandise exports.

The following case study outlines issues facing small-scale traders in the fisheries sector, following market liberalisation and formalisation of border trade.

Case study 4.6: Small-scale fish trade between Cambodia and Thailand

Cambodia's inland fisheries are the fourth most productive in the world given the combined capacities of the Tonle Sap (Great Lake) and the Mekong River, where more than one million people depend on the fisheries sector for employment, income and food security. Thailand is the largest importer of freshwater fish from Cambodia.

Commercial activities in the border areas developed during the 1980s and 1990s along with changes in border trade policies and structures, such as the establishment of state-owned enterprises, market liberalisation and formalisation of border trade. Cambodian small-scale fish traders are important actors in the trade chain, and the fish trade has created employment for these women who are now more able to financially support their households. However, in the overall fish trade chain, small-scale traders are more vulnerable to the impacts of border regulations and price fluctuations in the market, and as women are segregated in this sector, there are gendered implications. There are several reasons why women are concentrated in small-scale trading. First, women dominate the domestic fish retail trade, and small-scale export is seen as the extension of such a role. Second, women small-scale traders normally have little capital. They also have less connection with government officers or with fishers/ fish lot owners, and they have less capital to extend credit to fishers to ensure their supplies of fish. Third, small-scale trade is considered unsuitable for men.



This sex-segregation in the fish trade means that women in the small-scale border trade have difficulty in securing fish. Because they are unable to stock fish, and have little money to invest in ice, they also need to sell their fish as quickly as possible. This means they are unable to store their stock when fish price fluctuations between Cambodia and Thailand do not go in Cambodia's favour, making their business riskier. Additionally, because they have less connection with government officers and are unable to hire brokers because of their smaller quantities of fish, they are more vulnerable to fee collections by officer and others at the border. While Cambodian border fees have decreased following demonstrations by small-scale traders and transporters in 2002, Thai fees and border restrictions have increased dramatically. Apart from a two to five-fold or more increase in Thai customs and additional payments including water and sanitation fees to certain markets, import registration was strictly enforced. As only Thais can register as importers, small-scale women traders also found themselves paying fees to registered companies. These difficulties are compounded by the lack of horizontal links between small traders – who are scattered geographically – making it difficult for them to unite and construct a sense of fellowship towards dealing with common problems.

SOURCE: KUSUKABE ET AL, 2006.



Activity 4.5: Checklist on the gender impacts of NAMA

On the next page is a selection of statements relating to the gender impacts of NAMA. For your country/ region mark them Yes/ No/ Don't know (information not available). If the answer is 'Don't know', note where or how you could get the answer.

Add any further statements you think are particularly relevant for your context.



Key reading Unit 4d (on CD-ROM)

Williams, M (2005) 'The WTO negotiations on non-agricultural market access: Gender and the removal of industrial tariffs', originally published in *GERALinks*, the quarterly newsletter of the Gender and Economic Reforms in Africa Programme, Third World Network-Africa, July, http://www.igtn.org/pdfs//400_Mariama%20NAMA%20-%20GERALinks.pdf.

	Yes	No	Don't know
1 With NAMA tariff cuts will lead to declining government revenue.			
2 This is likely to lead to a cut in government spending, with likely impacts on public provision in the health-care and education sectors.			
3 With these cuts in spending women and men are likely to increase their unpaid labour to take care of others.			
4 Given women's double role in provisioning and care, women's time burden and care activities will increase.			
5 Employment dynamics are complex and depend on whether women were significant players in manufacturing or related sub-sectors; what can be expected are a significant number of job losses.			
6 In the end, economy-wide reductions in tariffs have an impact on the employment of women and men through reduced domestic production and output. They also have impacts on the market size of domestic firms.			
7 When declining industrial production by domestic firms is offset by increased production in other areas (e.g., agriculture or services) or by inflow of foreign firms then the unemployment effect will be temporary.			
8 When increased production occurs primarily through the inflow of foreign capital (in assembly type operations), and if the new jobs need low-skilled labour, the preferred labour force are women.			
9 Women entrepreneurs will probably be less able to adjust to shocks in the manufacturing sector and will probably be more vulnerable to import competition than male-owned firms.			
10 There are likely to be negative multiplier (spin-off) effects. Shocks in the manufacturing sector will affect other sectors directly dependent on it (or the spending of wage earners in this sector) for the purchase of raw materials as well as services.			
11			
12			

Training suggestions appear at the end of the unit.

Other trade agreements

The Sanitary and Phytosanitary (SPS) Agreement

The SPS requires countries to establish minimum standards for export of agricultural products – such as fresh fruits and vegetables, meat and meat products, and fish – in order to protect human, animal and plant life or health. However, it is argued that the SPS has been used for protectionist ends by some countries to set higher than international standards. Many developing countries may not be able to meet these standards and are thus unable to compete.

From a gender perspective, the SPS provisions may penalise small producers, business owners and exporters. Women are particularly disadvantaged because of gender inequalities in access to capital (for machinery), technical and market information, and training and development schemes. They may find it hard to access and understand the scientific and technical information, especially if it is not available in local languages.

The Agreement on Textiles and Clothing (ATC) or the Multifibre Arrangement (MFA)

Textiles and clothing are particularly important to Asian countries, which account for 60 per cent of textile and clothing exports. The industry is dominated by giant retailers and super-label companies from industrialised countries. Because it is labour intensive with a large share of women workers, this sector has critical implications for development and gender equity in exporting countries.

The ATC required industrialised countries to phase out their quotas and restrictions on imports by 2005. However, they may find ways of introducing new forms of protectionism, such as technical barriers to trade.

The agreement will enable transnational corporations (TNCs) to become even more flexible in their operations. It has been expected that some countries, such as China, India, Pakistan and South Korea, would gain, while smaller economies such as Bangladesh and those that import fabrics, such as the Philippines, Sri Lanka and Thailand would lose out and that some could lose their textiles and clothing industries altogether. However, it appears that Bangladesh and others have not been as negatively impacted as expected.

The Agreement on Trade-Related Investment Measures (TRIMS)

TRIMS focuses on measures seen to be trade restricting or trade distorting. Basically it prohibits member countries making the approval of investment

conditional on laws, policies or administrative regulations that favour domestic products. It includes:

- 1 minimum local content requirements (in terms of value, volume or proportion)
- 2 trade balancing requirements (limits on purchase or use of an imported product up to the maximum value or volume related to local production)
- 3 restrictions on repatriation of dividends
- 4 ceilings on the equity holding of foreign investors.

The rules enable international firms to operate more easily within foreign markets. Many Southern countries have revised their commercial and investment laws as part of bilateral investment agreements to encourage foreign direct investment (FDI). More women than men tend to work in industries in which capital is more mobile and that are more sensitive to foreign competition. Such industries are most affected by economic downturns. There are implications for the job security of their mostly female workforce and the marginalisation of women's economic production and enterprise.

Multilateral environment agreements

Global trade rules include measures in environment-related areas. For example, human, animal and plant life or health (SPS Agreement), environmental technical standards (Agreement on Technical Barriers to Trade), subsidies related to agriculture (AoA) and restrictions on patenting inventions necessary to protect the environment (TRIPS). Women play a central role in social reproduction and natural resources management, as well as in environment protection. They are therefore affected by these agreements, though more research is needed into the gender impacts.

Information about these agreements comes from the Cutting Edge Pack *Gender and Trade* (pp 28–29).



There is a whole range of options here to relate this unit to countries/ regions/ sectors and to match participants' interests.

- Relate activities to the 'Other trade agreements' listed in the last section if these are relevant to the country/ region.
- Ask participants to do the checklist activity for a sector. Then discuss answers and any further statements they have added.
- Depending on the size and make-up of the group, participants could focus on one sector or divide into groups to focus on different sectors.
- Choose sector case studies or examples from the country/ region. Then get participants to relate the general issues raised in the readings to the particular case study. (See Unit 7 Tools #8 Developing a case study.)
- Ask participants to pool information to build up a profile of a sector (e.g., agreements in force, state of play of negotiations, gender impacts). If working as small groups on different sectors, they can make short presentations to each other. If time allows, give participants the task of further fact finding for this activity.



Key readings Unit 4e (on CD-ROM)

Randriamaro, Z (2006) *Gender and Trade: Overview Report*, a Bridge Cutting Edge Pack Series, Sections 3 and 4. Section 3 looks at the historical context of the MTS and the formation of the WTO. Section 4 considers the gender impacts of trade liberalisation, including the impacts by sector.

Relevant chapters, as listed in the unit, from Tran-Nguyen, A and A Beviglia Zampetti (eds) (2004) *Trade and Gender: Opportunities and Challenges for Developing Countries*, UNCTAD, Geneva.

Unit review

Use this review of what has been covered to assess your progress. Look again at the unit objectives and check if you can now do them. Look through your answers to the activities and see if you want to add to them.

This unit has covered the following main points:

- The MTS – why, what, where, who, how?
- Key areas covered by the MTS:
 - agriculture
 - services
 - intellectual property rights (TRIPS)
 - non-agricultural goods
 - other trade agreements.

To recap, the learning objectives for the unit were to:

- describe the workings of the multilateral trading system, its institutions and the framework of agreements through which it operates
- identify the main sectors covered and the gender impacts in each
- relate all these to experiences of your own country/ region/ sector.

References

Hollingsworth, J (2006) 'The Barbados tourist industry: Gender dimensions' case study presented at the Regional Workshop on Capacity Building on Gender, Trade Policy and Export Promotion for the Caribbean Region, Ocho Rios, Jamaica.

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Williams, J (2006) 'Household workers in Jamaica' case study presented at the Regional Workshop on Capacity Building on Gender, Trade Policy and Export Promotion for the Caribbean Region, Ocho Rios, Jamaica.

Williams, M (2005) 'The WTO negotiations on non-agricultural market access: Gender and the removal of industrial tariffs', originally published in *GERALinks*, the quarterly newsletter of the Gender and Economic Reforms in Africa Programme, Third World Network-Africa, July, http://www.igtan.org/pdfs//400_Mariama%20NAMA%20-%20GERALinks.pdf.

5 Regional and bilateral agreements

'The MTS is facilitated by a network of bilateral, regional and quasi-regional arrangements on aid, development and trade cooperation assistance'.

'Regional arrangements sometimes drive the global trade liberalisation process'.

These two statements were made in Unit 4. But they raise the question: if the market place is global, why is there a need for regional and bilateral agreements?

This unit looks at what regional and bilateral trade agreements (RTAs and BTAs) are, how they relate to the MTS and the WTO and their possible gender impacts. It then looks at Economic Partnership Agreements (EPAs). It will help you to:

- define the scope and constraints of RTAs and BTAs
- plan steps to brief trade negotiators in relation to RTAs for your own country/region
- identify gender analysis requirements in relation to RTAs.

RTAs and BTAs: background briefing

Definitions

- **Regional trade agreement (RTA)**
– an agreement to support regional trade arrangements. The coverage and depth of preferential treatment varies from one RTA to another. RTAs tend to go beyond tariff cutting and may extend beyond traditional trade policy mechanisms to include regional rules on investment, competition, environment and labour.
- **Bilateral trade agreement (BTA)**
– an agreement between two countries to support their trade arrangements. It gives the two countries favoured trading status between them. In addition a bilateral investment treaty (BIT) is an agreement establishing conditions for private investment by companies of one country in another, i.e., foreign direct investment (FDI).

Examples of RTAs, BTAs and BITs are:

- European Union (EU)
- Cotonou Agreement (ACP-EU)
- North American Free Trade Agreement (NAFTA) (Canada-Mexico-US)
- Free Trade Agreement of the Americas (FTAA)
- Central American Free Trade Agreement (CAFTA)
- African Growth and Opportunity Act Agreement (Africa-US)
- Caribbean Basin Trade Partnership Act (CBTPA)
- European Free Trade Association (EFTA)
- ASEAN Free Trade Area (AFTA)
- Asia Pacific Economic Cooperation (APEC)
- Association of South East Asian Nations (ASEAN)
- Caribbean Community and Common Market (CARICOM)
- Southern Common Market (MERCOSUR)
- Southern African Development Community (SADC)
- West African Economic and Monetary Union (WAEMU)
- Economic Community of West African States (ECOWAS)
- Common Market for Eastern and Southern Africa (COMESA).

Types of RTAs

From less formal to more formal
Free trade area (FTA) Removal of trade barriers between parties, but retention of national trade barriers to third parties – e.g., EFTA/NAFTA. This includes EPAs (see overleaf).	Custom union Removal of trade barriers between parties; common external tariff/ barriers – e.g., European Economic Community (EEC).	Common market As custom union + freedom of factor flows (free movement of capital and labour as well as goods and services) – e.g., European Union.	Economic union Unification of all policies (fiscal, monetary) – e.g., United States.

What's the purpose of RTAs?

On the plus side

They play an important part in the MTS to:

- maximise trade and increase employment at home
- create more exports and fewer imports
- give access to resources and know-how.

But

They create discrimination against non-members.

They may lead to trade diversion (i.e., trade may be diverted from a more efficient producer to a less efficient one who is part of an RTA).

North-South RTAs may push out deeper regional integration commitments.

How are RTAs and the WTO related?

Similarities

Both are strategies for opening markets (RTAs are quicker to conclude; WTO offers successive rounds of negotiations). Both are based on reciprocity.

Differences

Rules of origin (different approaches) most-favoured-nation (MFN) approach – i.e., a country should not discriminate among its trading partners (RTAs bypass or depart from this)

Dispute settlement (potential conflict with WTO).

How do RTAs fit into the WTO framework?

For the WTO

They can help to strengthen the MTS, but they are discriminatory (departing from the MFN principle) and their effects are not clear.

The increase in RTAs and BTAs produces overlapping memberships.

Different trade rules for different partners can coexist in a single country. This makes them complex to administer and expensive to enforce.

There is a risk of inconsistencies, confusion and problems of implementation, especially where RTAs overlap.

For developing countries

There may be reason for caution.

RTAs and BTAs may include 'WTO plus and minus' provisions that go beyond the WTO negotiating agenda. These may not be consistent with development goals.

There is concern that negotiating dynamics may be one-sided in North-South RTAs and even in South-South RTAs.

Gender and RTAs

Do RTAs address gender concerns?

RTA trade rules, like MTS rules, do not actually address gender issues as part of the agreement. The social impact of trade agreements on different sectors has only recently been recognised, e.g., in relation to non-trade concerns such as labour conditions and the environment.

What are the gender impacts of RTAs?

The likely gender impacts are those of trade liberalisation generally – primarily on employment, wages and the care economy. The impact of RTAs may be felt more acutely in the short run since they have ambitious market access agreements.

So the questions to ask are: what are the specific ways a specific RTA has an impact in a specific sector in a specific region – the basic gender analysis questions.

Activity 5.1: Filling in the background

If you can, answer the following in relation to your country. If you can't, plan next steps to find the answers, then search for the information.

What RTAs/ BTAs is your country partner to?

Who are the other partners?

What type of RTA is it?

What are the main features of the agreement(s) (e.g., sectors covered)?

What are the negotiating dynamics (e.g., North-South or South-South balance)?

What are the perceived threats and opportunities?



Economic Partnership Agreements (EPAs)

As an example of RTAs and related gender issues, this action guide looks in more detail at EPAs.

What are EPAs?

Economic Partnership Agreements (EPAs) are proposed new trade agreements under negotiation between the European Union (EU) and six regional groupings from the African, Caribbean and Pacific (ACP) group of nations. The European Commission (EC) is mandated to negotiate for the EU. EPAs originated from the proposal of the EU in 1996 to negotiate with the six ACP regional groupings on the basis of reciprocal free trade agreements, by contrast with previous agreements based on trade preferences. The EPAs are RTAs, but are more plurilateral in nature.

Between 1975 and 2000 trade between the EU and ACP countries was governed by the Lomé Convention. This granted ACP countries better access to the European market than other developing (and developed) countries by granting them trade preferences. The preferences granted to ACP countries under these conventions were non-reciprocal: ACP countries did not have to extend preferences to the EU in return.

There is much debate about the potential impact of EPAs. The EU argues that EPAs will facilitate economic integration of ACP countries, which will eventually lead to poverty eradication. They argue that reciprocity in market access will increase competition and lead to economic growth. To this end, EPAs are development-centred agreements designed to stimulate such growth.

On the other hand, critics argue that EPAs are simply free trade agreements designed to ensure EU access to developing country markets. They argue that EPAs will require ACP countries to provide reciprocal market access to EU imports in a short timescale. This will make it difficult for them to compensate for loss of tariff revenues and deal with supply constraints that prevent their producers competing successfully with EU imports.

After the Lomé preferences expired, the EU and ACP countries in 2000 signed a trade and development accord known as the Cotonou Partnership Agreement. This provided for the negotiation of new trade agreements between the EU and ACP by 1 January 2008.

In 2002 the European Union and the ACP agreed on internal negotiating directives to guide their position in the EPA negotiations.

Negotiating positions of the EU and the ACP

The two positions are very different. Broadly:

EU

- envisages reciprocal liberalisation of trade in goods and services, in accordance with WTO rules
- envisages EPAs as free trade agreements and makes no provision for alternatives
- pushes for new agreements on investment, competition policy and government procurement.

ACP

Wants to:

- change WTO rules especially those relating to RTAs, to conclude a better trade agreement through EPAs with the EU
- have the development dimension better taken into account
- make future EPAs compatible with the WTO
- ensure that no ACP State should be worse off after 2007 than under the current arrangements
- extend the transition period for RTAs.

Controversial issues

- the impact of reciprocal trade liberalisation on both development strategy and revenue loss through tariff cuts
- the EU's push to include new agreements on investment, competition policy and government procurement (which would further remove the policy tools that governments need for national development goals)
- the question of alternatives to EPAs if they cannot be reformed enough to become truly developmental agreements, so that ACP countries have a genuine choice of trade deals
- the impact on regional integration
- the negotiating dynamics, given that on one side there is an economic superpower (the EU) and on the other an economic minnow (the ACP)
- the transparency of the negotiations. (NGOs are largely excluded beyond the civil society dialogue process.)

Openings for negotiations

The Cotonou Partnership Agreement of 2000 does include some gender-relevant provisions that could be taken up by EU or ACP negotiators or by NGOs.

Article 1 states that, 'Systematic account shall be taken of the situation of women and gender issues in all areas – political, economic and social'.

Article 31 refers to gender as a 'thematic and cross-cutting' issue. To summarise, this states that cooperation should:

- ensure the equal participation of men and women in all spheres of life
- help improve the access of women to all resources required for the full exercise of their fundamental rights
- create a framework to integrate a gender-sensitive approach and concerns at every level of development and encourage the adoption of specific positive measures in favour of women.

However, the economic and trade co-operation provisions of the Cotonou Agreement do not refer explicitly to the gender aspects of trade.

In addition to the main Cotonou Agreement, a Compendium lists five principles that should guide cooperation:

- 1 Gender analysis at macro-, meso- and micro-levels must be mainstreamed in the conception, design and implementation of all development policies and interventions, as well as in monitoring and evaluation.
- 2 Women and men should both participate in and benefit from the development process on an equal basis.
- 3 Reducing gender disparities is a priority for society as a whole.
- 4 The analysis of differences and disparities between women and men must be a key criterion for assessing the goals and results of development policies and interventions.
- 5 Co-operation must encourage and support changes in attitudes, structures and mechanisms at political, legal, community and household levels in order to reduce gender inequalities and in particular:
 - Political power-sharing and full and equal participation in decision-making must be promoted at all levels;
 - Economic empowerment and equal access to and control over economic resources must be strengthened;
 - Equal access to and control over social development opportunities must be fostered.

Next, here are two different views of EPAs – from an EU negotiator and from campaigning NGOs in the Caribbean.

EPAs: a negotiator's view

From an EU negotiator involved in the EPA negotiations

? What do you as a trade negotiator need to know in order to integrate gender issues into negotiations?

Trade negotiators need to know:

- 1 The legal/ negotiating framework in which they are operating – so how gender fits into the framework. The negotiator cannot include anything outside the framework (e.g., many developing countries have refused to include labour issues in the Doha Development Agenda (DDA), so under the framework negotiators cannot include labour issues in the DDA negotiations). If a gender issue lies within the framework, then negotiators need to know where (e.g., in a social provision of the agreement).
- 2 Clear, specific objectives. What is the negotiator expected/ trying to achieve? E.g., commitments to the International Labour Organization (ILO) core conventions, more jobs for women, anti-discrimination in the workplace, better health and safety, commitments to social dialogue.
- 3 Understanding priorities. Negotiations cover a vast array of issues. Negotiators need to know where each issue comes in priority (this is difficult, and priorities may change during the negotiations). However, it is easier to prioritise if the negotiator has clear, specific objectives.

? What do you as a trade negotiator need to do in order to integrate gender issues into negotiations?

For EU negotiators, the Member States provide their mandate. Negotiators will negotiate the issues that Member States agree on. More generally, negotiators tend to work best on issues that are clear, and that they believe will make a difference.

? What kind of practical tools would be helpful for you?

- 1 Reliable data that shows the positive and negative impacts of trade liberalisation on people. In terms of gender, evidence that these positive/ negative impacts affect women and men differently.
- 2 Reliable predictions of how trade agreements will impact on women and men.

? What are the opportunities and difficulties for trade negotiators in getting gender and trade issues included in discussions and negotiations?

The most important obstacle is persuading developing countries that social issues (including gender) are not a means of protectionism by developed countries, but are actually beneficial to developing countries themselves.

The ILO core conventions provide an opportunity to use a framework (though they have been excluded from the DDA). Incentives provide an opportunity. The core conventions are part of the EU's Generalised System of Preferences (GSP) and GSP+ schemes for providing countries with incentives to meet labour standards and basic human rights. Sustainable Impact Assessments (SIAs) can highlight the impacts on gender and suggest mitigating measures.



Activity 5.2: Briefing a negotiator

In the light of the negotiator's view above, list five messages you would like to get across to an EPA negotiator negotiating for your country/ region.

1

2

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4

5

Caribbean NGOs' view of EPAs

Caribbean NGOs are calling attention to the need to ensure the protection of livelihoods in the EPA negotiations.

Operation Get Up! Stand Up! It's About Livelihoods

- 1 **What is the campaign about?** Operation Get up! Stand up! It's About Livelihoods is a rallying call for civil society to be mobilised against the continuing destruction of livelihoods due to the current process of trade liberalisation.

- 2 **Who or what will the campaign target?** This campaign is specifically targeting the negotiators involved in the third phase of the Economic Partnership Agreement (EPA) negotiations between the Caribbean and the European Union. The third phase, which is the real negotiating phase, will be launched in St Lucia on the last week of September 2005.

- 3 **Why should you get involved?** The impact of trade liberalisation will affect us all. Right now, it is affecting farmers and their families; it is affecting workers as firms move from the region to cheaper places of business. It is affecting our government's policy space.

All of this affects our lives, our future prospects. These agreements will affect the types of jobs we have, the conditions of work, ownership of intellectual property and our food security.

In this year alone, we have seen EU policies that will further devastate the region, particularly our small farmers in rural areas. We need to make sure that our negotiators remember that development is not about numbers, it's about people. It's time for the Caribbean people to take a stand.

- 4 **Why are we targeting the EPA process?** The EU restructuring process under the aegis of WTO compatibility has devastated both the sugar and banana industries in the Caribbean, destroying thousands of livelihoods and potentially disrupting the social and economic fabric of our societies. In Guyana alone, the sugar industry accounts for 20 per cent of GDP, 30 per cent of export earnings and provides a livelihood for at least 125,000 persons. The EU price cuts for sugar will cost the region some €100 million annually.

In the Windward Islands it is estimated that over 100,000 persons live in households whose income is derived wholly or significantly from banana farming. These banana households represent between 24 and 40 per cent of all households in various countries.

It was estimated that banana-producing countries would lose over €25 million annually from the first WTO banana ruling. The new WTO ruling on the proposed tariff has the potential to dismantle the industry altogether.

Our key question becomes therefore: How much more will it cost us in the EPA negotiations?

We believe that the EPA negotiations must be based on the spirit of the Cotonou agreement, which spoke to ensuring development, respecting levels of development and ensuring that countries would be no worse off from the process.

5 What do we want? We want our small farmers, small producers and workers to realise that they are not alone; that we understand their plight and recognise that the process will impact on each and every one of us.

We want to ensure that the negotiators from both the EU and CARIFORUM remember that it is not about deal making but about the livelihoods of thousands of people.

We want to ensure that the EU's definition of 'substantially all trade' does not result in further erosion of our government's ability to provide critical public services.

We want our regional leaders to be empowered by our support to stand up to any bullying from the EU.

We want to ensure that Commissioner Mandelson and the EU officials remember the spirit of the Cotonou agreement, which prioritises development and poverty reduction as stated in Article 19 and Article 34(1) of the Agreement.

6 What are our messages/ issues? 'Trade as a tool and not as a rule'. WTO compatibility should not be used as an excuse to under-deliver on development imperatives.

'Protect livelihoods'. Protecting people's jobs, their way of live, their prospect for a decent job at a good wage is the only way to ensure development.

'No back door here!' Don't bring the Singapore issues into the Caribbean.

'Compensate to alleviate'. Adequate compensation should be provided to directly alleviate the farmers who will be disenfranchised in the process.

7 What are we doing? As part of our campaign we are undertaking the following activities:

Our Petition Campaign – We want to collect at least 10,000 signatures from all across the Caribbean and the world.

Our Rally – Come to St Lucia on September 30th 2005 to march with us as we remind our negotiators what the process should be about

Our Education Programme – We will be having mini-consultations and education awareness programmes so that the region can become mobilised around the issue. JOIN US!

8 Who is involved in Operation Get Up! Stand Up! It's About Livelihoods?

Operation Get Up! Stand Up! is a campaign supported by major regional network organisations, national organisations and international partners. These organisations represent trade unions, farmers, women, development agencies – all of whom agree that the process is disadvantageous to small vulnerable economies and their populations.

SOURCE: MUNRO-KNIGHT, 2005.



Activity 5.3: More messages for a negotiator

Look at the messages/ issues in section 6 of the description of the Get Up! Stand Up! Campaign.

Note how they compare with your messages for briefing a negotiator in Activity 5.2.

Putting yourself in the place of a negotiator, list five things you would ask the campaign to tell you to help the case for integrating gender issues into EPA negotiations.

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EPAs: likely impact

One World Action is undertaking research that aims to make recommendations on how to include gender analysis more systematically in trade negotiations. The research focuses on one key export in each of three countries – sugar in Mozambique, beef in Namibia and cut flowers in Zambia.

According to One World Action, 'The project will examine the likely implications of EPAs for women's rights and gender relations. It will make recommendations on how to include gender analysis more systematically in Sustainability Impact Assessments and in trade negotiations in order to ensure that EPAs promote, and not undermine, gender equality.' <http://www.oneworldaction.org/indepth/project.jsp?project=255>.

This short case study takes the example of sugar exports in Mozambique to look at impacts and gender analysis questions to be asked.

As you read it, compare the case described with relevant experiences in your country/ region.

Case study 5.1: Sugar exports in Mozambique – the likely impact of EPAs on women's livelihoods

This case study best illustrates the broader challenges of applying a gender analysis to discussions on EPAs because it shows that even though an EPA could be good for the Mozambican sugar industry because of industry expansion, this will not de facto lead to an improvement in the lives of poor women and men and hence have a positive impact on poverty levels. The industry plays a vital role in the Mozambican economy. It has contributed to increased employment and exports and it is the major employer within the private sector and the second highest employer in the public sector, where women represent 14 per cent of the labour force. However, this has not contributed to positive changes in women's lives.

Employment

The sugar industry employs more than 21,500 seasonal and permanent workers, which is equivalent to a little more than 17,000 full time workers. These figures exclude workers of companies that are contracted by some sugar growers for cutting, collecting and transport of cane, as well as those who work for outgrowing independent farmers. After the public sector, the sugar industry employs the highest number of people in Mozambique.

The number of female workers in the sugar industry is just above 16 per cent of the total workforce of the industry. Xinavane, one of the factories in the southern region, stands out from the other industries as it employs nearly 56 per cent of the total female workforce of the four factories.



Jobs in the Sugar Sector, 2005

	Marromeu	Mafambisse	Xinavane	Maragra	Total
Permanent	4,442	1,399	2,062	1,214	9,117
Seasonal/ short term	3,356	4,235	3,490	2,292	13,373
Women	461	370	2,221	873	3,925
Total	7,798	5,634	5,552	3,506	22,490
Seasonal/ short term ETI	2,797	2,588	2,133	1,655	9,173
Total ETI	7,239	3,987	4,195	2,869	18,290
Sharing	35%	25%	25%	16%	100%

The number of women employed in the sugar industry, compared to men, is low considering that the majority of women in the Mozambique economy are in the rural areas and they are in the agricultural sector. Although available data does not explain the differences between men and women's participation and contribution, it is known that women do not have equal access to and participation in formal employment nor to income agriculture. Women are more likely to be involved in subsistence agriculture. Given the restrictions they have in doing cropping activities, women should be compensated by having more access to other kind of activities such as cultivation and the factory work.

Women mentioned the fact that fertilisation is a heavy duty because they have to carry huge and heavy amounts of fertiliser: a container on their backs and another refill quantity on the top of their heads. They walk long distances spreading the fertiliser. This can cause health problems (e.g., back/ spinal injuries) in the long term. Women with babies or small children have limited access to jobs due to childcare activities. There are no efforts from the sugar factory to create childcare facilities near the workplace. The single crèche in the Manhica village is far away from the factory. Women working in the factories cannot afford to pay the amounts charged due to the low level of salaries they earn. Most of the women are heads of households and many men from Manhica District work in the South African mines. These result in work overloads on women who have to combine paid employment, subsistence agriculture and house care activities. Where families, relatives or neighbours are affected by HIV/ AIDS, women also have to provide care support (unpaid care work).

If the EPAs are developmental, as stated by the EU, and considering the

opportunities foreseen for the sugar industry in Mozambique, it is likely that this sector can contribute to poverty reduction. However, to make this happen it is important that the period of preferential access to EU markets by LDC countries after 2009 is extended and that policies and procedures are put in place in order to improve access to employment for women, working conditions (particularly for pregnant women), childcare services, access to literacy programmes, access to information and communication technology and promotion of investment by local producers. In other words, the developmental dimensions of EPAs need to be strengthened. Opportunities should be given to women to engage in local farmers' cane production for supplying the sugar factories. But for that, they need access to and control of land, capacity building in terms of training, access to new technology to improve and increase productivity, and access to credit to allow them to invest in land.

Gender analysis questions

Because One World Action is interested in how poor women would potentially be impacted by EPAs, questions covered the following areas:

- Where are women in the formal and informal economy relative to men?
- What levels of employment/ unemployment exist among women relative to men?
- What kinds of national policies/ strategies are in place to address poverty and unemployment?
- In what ways precisely is the sector affected directly or indirectly by import and export trade? What is the impact on women relative to men?
- How do current trade policy and other government trade-related policies (e.g., on marketing inputs and outputs) affect the situation? How are things different now because of these policies than the way they would be without those policies? What is the relative importance within this group of policies of the ones that might be changed in an EPA? How would women be impacted relative to men?
- How will the status quo change if the current policies are altered in the way that may be necessary under an EPA? What would this mean for women relative to men?
- Are there other policies (not affected – or not necessarily affected – by the EPA) that could be used to offset any adverse effects identified in the previous bullet?

SOURCE: DA GRACA SAMO, 2006 AND KHAN, 2006.



Activity 5.4: EPAs and gender analysis

Look again at the gender analysis questions in the Mozambique case study.

- Are these gender analysis questions the relevant ones for your situation?
- Is the information available? If so, where?
- If not, what steps are needed to collect it?

What other questions are relevant for your situation?



- Collect information about the relevant RTAs/ BTAs and consider them in more detail – for example, using Activity 5.1: Filling in the background.
- Work on a local case study to replace the Mozambique case study, or identify a local example (e.g., a particular industry/ sector), share information and identify the most important gender analysis questions and information needs.
- Get group members/ small groups to work on Activity 5.2: Briefing a negotiator, making it relevant to the particular situation, and depending on the knowledge and expertise of group members. (See Unit 7 Tools #2 Influencing trade negotiators.)
- Do a group exercise to define the work needed to collect reliable data and make reliable predictions for a negotiator. Depending on the participants, this could go into more detail about valid and reliable research methods and evidence.
- Get participants to research and analyse latest developments in EPA negotiations.



Key readings Unit 5 (on CD-ROM)

The key readings for this unit are the following two papers.

'Economic Partnership Agreements – where we are with the regional negotiations', by Tom Sharman, Policy Officer, ActionAid International UK. Paper presented at the Workshop on Gender in Global and Regional Trade Policy: Contrasting Views and New Research, University of Warwick, 5–7 April 2006.

This paper provides factual background to the EPAs, with a brief history of EU-ACP trade agreements and EPA negotiations, and an overview of negotiating mandates and controversial issues.

Khan, Z (2006) *Making Trade Work for Women: The Likely Impact of Economic Partnership Agreements on Women's Rights and Gender Equality* One World Action.

Report on the likely impact of the EPAs on women's rights and gender equality in Southern Africa. It makes recommendations on how to integrate gender analysis more systematically in regional trade negotiations and agreements.

The material on EPAs in this unit is based on these two papers.

Unit review

Use the review to assess your progress. For example, look again at the unit objectives and check if you can now do them. Look through your answers to the activities again and see if you want to add to them.

This unit has covered the following main points:

- RTAs and BTAs – what they are, definitions, types, purpose, how they relate to the WTO and their possible gender impacts
- EPAs – the respective positions of the EU and ACP countries; openings for negotiations on gender-relevant provisions
- a negotiator's view and some NGOs' view of EPA negotiations
- the Mozambique case study of sugar exports and the likely impacts of EPAs.

To recap, the learning objectives were to:

- define the scope and constraints of RTAs and BTA, with a focus on EPAs
- plan steps to brief trade negotiators in relation to RTAs for your own country/ region
- identify gender analysis requirements in relation to RTAs.

References

da Graca Samo, M and Khan, Z (2006) From paper presented the Workshop on Gender in Global and Regional Trade Policy: Contrasting Views and New Research, University of Warwick, 5–7 April 2006. Case study 'Sugar Sector in Mozambique' from unpublished draft of *Making Trade Work for Women: The Likely Impact of Economic Partnership Agreements on Women's Rights and Gender Equality* ,

Khan, Z (2006) *Making Trade Work for Women: The Likely Impact of Economic Partnership Agreements on Women's Rights and Gender Equality* One World Action, London.

Munro-Knight, S (2005) 'Caribbean Mobilisation: What is the campaign all about?', Caribbean Policy Development Centre, http://www.cpdncgo.org/article.php3?id_article=55.

Sharman, T (2006) 'Economic Partnership Agreements – Where we are with the regional negotiations', paper presented at the Workshop on Gender in Global and Regional Trade Policy: Contrasting Views and New Research, University of Warwick, 5–7 April.

6 Joining the global economy

How can women producers and workers in developing countries take advantage of the new economic opportunities offered by trade and market liberalisation?

How can women producers gain access to global markets in the context of the trade policy environment and multilateral trading system (MTS) described in the earlier units of this action guide?

How can women workers access better wages and working conditions within the global value chains of which they are a part? This unit will help you to:

- identify ways women producers and workers can take advantage of trade liberalisation
- learn from examples and case studies of initiatives
- outline the pros and cons of different strategies for accessing markets (e.g., fair trade, organic trade, national export strategies) and gaining better wages and working conditions (e.g., ethical trade, codes of conduct).

In this unit

Women producers and workers
A local economic enterprise
Implementation strategies
Market access and markets

Women producers and workers

This unit offers six case study summaries to illustrate (a) the experiences of women producers linking to global markets and of women workers integrated in global value chains, and (b) the lessons that can be learned. These case studies are drawn from *Chains of Fortune* (Carr, 2004), on which the content and ideas for this unit are largely based. The full case studies appear in that book.

There is also an additional case study about shea butter production in Burkina Faso that illustrates some of the issues that face a local economic enterprise in the global context.

The question the case studies seek to answer is:

- What strategies have successfully linked women producers with global markets or created jobs for women in export markets and on what terms?

First, an overview. The following diagram (overleaf) shows the possible constraints and benefits that may result from initiatives to link women producers to global markets and initiatives to improve conditions for women workers.

As you read the case study summaries, note which of these apply and add others you think are relevant.

Women producers

- gender inequalities in property rights and ownership
- lack of access to credit, technology and training
- cultural norms about women's roles
- negative effects of competition on weaker players, many of them women
- lack of effective organising

Women workers

- parental/ family pressure against women working outside the home
- employer discrimination
- lack of organising/ effective trade union representation
- cultural norms about women's work

CONSTRAINTS

Linking to global markets

INITIATIVES

Improving working conditions

BENEFITS

Direct

- profits/ income
- fair trade bonus payments

Indirect

- community development projects
- self-esteem and status
- raised morale and independence
- civil society organisations

Direct

- wages
- skills

The case study summaries suggest ways in which low-income women producers and workers can benefit from trade liberalisation if enabled to do so. They provide a range of contexts, strategies and experiences.

A – Women producers

Case study 6.1: The Kuapa Kokoo cooperative, Ghana

The Kuapa Kokoo cocoa cooperative in Ghana buys cocoa from its members for onward export and sale through the Ghana Cocoa Marketing Company. It has a membership of 45,000 farmers in 890 villages, of whom 70 per cent are smallholders and 30 per cent are women. The cooperative was established in 1993 – with the assistance of Twin Trading, UK and the Netherlands development organisation, SNV – in response to the partial liberalisation of the cocoa sector. It has grown very rapidly from its original membership base of 2,000 farmers.

In 2003, the output of this cooperative was 38,700 tonnes, which represented about 8 per cent of total world sales of cocoa. Of the total output, about 3 per cent is separated and tagged for the fair trade market, which guarantees a 'floor' price per tonne and a 'premium' of US\$150 per tonne for investment in community projects that meet women's priority needs in their everyday lives. In addition, Kuapa Kokoo members are part owners of the Day Chocolate Company in the UK, the purchase of which moved producers up the global value chain from production to retailing.

The case study shows how smallholders were helped to seize the opportunities that arose following the partial liberalisation of the Ghana Cocoa Board and were thus able to take control of their own livelihoods.

Case study 6.2: Virgin coconut oil cooperatives, Samoa

In Samoa a local NGO, Women in Business Development Incorporated (WIBDI), has introduced an improved production technology to 13 cooperatives to enable them to produce organic virgin coconut oil for export markets – primarily Australia and New Zealand. Each cooperative has about 50 members, all of whom belong to the same extended family. Women manage all but three of the cooperatives, and women's status has increased as they are seen as having brought income opportunities to their communities.

The project was started by WIBDI in 1996 as part of its micro-finance and micro-enterprise scheme. It has enabled women and their families to improve their incomes as well as reviving coconut production and contributing to export earnings. Exports increased significantly when organic certification was obtained.



The study shows how a local NGO can assist women to enter export markets through provision of traditional business services including credit, training, improved technologies and marketing research and assistance.



Case study 6.3: Cashew nut producers and processors, Mozambique

Women smallholders and factory workers were involved in efforts to regenerate the cashew nut production, processing and export industry in Mozambique. Following the collapse of the last state-owned processing factories in the 1990s, several smaller-scale factories were established by the private sector with government support.

A particularly interesting experiment was the setting up of 'satellite' processing units around one of these factories. This was seen as a way of adding more value locally, shortening the supply chain by eliminating middlemen and providing more employment for rural people, including women.

This innovative model revolves around a social entrepreneur in partnership with government and an international NGO, Technoserve.

B – Women workers



Case study 6.4: Deciduous fruit workers, South Africa

This study looks at the introduction of national labour legislation and private sector codes of conduct and their impact on women working in the fruit industry in South Africa. At the end of apartheid in 1994, there were an estimated 102,000 permanent workers on the country's fruit farms (of whom 26 per cent were women). While these numbers have increased, there has also been a restructuring of the workforce and of employment relations as a result of liberalisation. This meant the disbanding of the government-regulated marketing channel for fruit exports and opened fruit growers up to the direct forces of global competition and international quality and labour standards.

Enactment of national legislation, backed by international codes of conduct imposed by UK supermarkets, means that women's labour rights are being addressed for the first time and that they are now entitled to contracts in their own right. However, the combination of government legislation and increased global competition has prompted many growers to shed on-farm labour – mainly women – who then work as casual labourers without access to a contract.

Thus, although labour protection has shifted in a more equitable direction, further progress is needed if it is to be consolidated for all women workers, including the most vulnerable.



Case study 6.5: Women garment workers, Bangladesh

The export industry for ready-made garments has been a major result of liberalisation in Bangladesh. The industry employed 1.5 million workers in 2003, the majority of whom were women, and is a prime example of female-led, export-led industrialisation. This was promoted by the introduction of international quotas and export-oriented national policies, which supported the transfer of production and marketing expertise from Korea, and by the drive of local entrepreneurs.

Women workers in export industries, and especially in Export Processing Zones (EPZs), receive more benefits, higher wages and better working conditions than those in domestic industries. Exports have provided much-needed employment for women in the poorer section of the rural population and raised their visible significance as economic contributors to their families.

However, any improvements that have taken place in labour standards have reflected pressure from international buyers. This does not necessarily reflect greater self-enlightenment on their part, but is rather a result of international pressure, particularly from the trade union movement in the buyers' own countries, backed by consumer groups and student activists. But these groups are only interested in the export sector of the economy, and improvements are largely confined to those factories with which buyers deal direct. Such top-down improvements are the product of voluntary agreements between buyers and their suppliers. They do not substitute for building the awareness and capacity of workers to represent their own interests with employers and the government.

Although there were queries about the long-term sustainability of the industry, partly as a result of the phasing out of the Multifibre Arrangement (MFA) in 2005, predictions so far have not been realised and exports continue to increase.

(See Unit 2 Concepts for a longer version of this case study.)



Case study 6.6: Women call centre workers, India

This study looks at the relocation of jobs in the information technology-enabled service industries, such as call centres, from high wage to low wage countries. India has been a major recipient of such work and is expected to have a US\$57 billion annual export industry in information services by 2008 employing four million people, of whom at least 40 per cent will be women.

Call centres already employ more than 160,000 people, of whom between 45 and 70 per cent are women. Although these jobs are located in the formal sector, they display many characteristics typical of informal



employment. These include lack of security. Many workers lack formal contracts and there is no trade union organising in the industry.

As with garment workers, there are queries about the long-term sustainability of the jobs created, in part because of continued rapid technological change that could result in call centres being bypassed altogether as customers relate directly to the computer of the HQ company.

Activity 6.1: Analysing the case studies

Use this matrix to help you draw out the different features of the case studies. Choose which case studies or aspects of them are of particular interest. You may then follow up by reading the complete case study in *Chains of Fortune*.

	Cocoa	Virgin coconut oil	Cashew nuts	Deciduous fruit	Garments	Call centres
Work involves:						
Independent producer/ smallholders						
Employees of small factories						
Wage workers in larger enterprises						
Product involves:						
Traditional commodities						
Non-traditional agricultural exports						
Labour-intensive manufactured goods						
Labour-intensive services						
Strategy involves:						
Fair trade						
Traditional business development services/ niche market						
Small enterprise development/ social entrepreneurship						
Ethical trade/ labour legislation						
Female-led industrialisation						
Technology-driven globalisation						

A local economic enterprise in the global context

Next, here's a short case study about shea butter in Burkina Faso. This shows some of the issues that face a local economic enterprise in the global context. Read the case study and use the information it contains to answer the questions in Activity 6.2, which follows.



Case study 6.7: Shea butter in Burkina Faso – local to global

It is the mandate of the United Nations Development Fund for Women (UNIFEM) to increase women's economic power through the globalisation of women-produced commodities. As such UNIFEM initiated a project to assist women shea butter producers of Burkina Faso so that they had direct control over production and increased access to international markets. This study outlines trade and market information relevant to the project and makes recommendations on possible guidelines for increased marketability of shea butter on the international market.

Shea butter, or karite, is a vegetable fat extracted from the nut of the shea tree, which is indigenous to Sahelian Africa. This product is used in the manufacture of personal care, cosmetic and confectionery items. The producers of shea butter are mainly women, and there is high potential for income generation through local consumption as well as export of this product.

The market for shea butter worldwide in cosmetics is approximately 1,500 metric tonnes and about 500 metric tonnes for the European cosmetic market. Europe is currently the largest market for shea butter in both the cosmetics and confectionery industries. In the confectionery industry, shea butter is mainly used in chocolate products. If the European Union's proposal to allow vegetable fats (other than cocoa butter) to be used in chocolate production is passed, then the demand for shea butter in the confectionery industry could significantly increase.

There is also potential for increasing the size of the shea butter market in North America and Japan. Low consumer knowledge of the product has led to smaller markets for shea butter in the North American natural, ethnic and established cosmetic product markets. Japan uses very little shea butter in its chocolate production and none in its cosmetic industry. Some European and American companies buy shea butter directly from West Africa.

The fact that neither Europe nor North America have tariffs, quotas or restrictions on the import of shea butter, though tariffs may apply in Japan, reduces the cost of exporting the product and the commission that middlemen charge. Working with Alternative Trade Organisations

(ATOs) is beneficial because they offer viable mechanisms through which commodity producers can bypass several intermediary stages in the trade process and consequently increase their chances of receiving a fair return for their product. They also help with marketing and liaising with government import/ export agencies.

Consumers are interested in buying fair trade products. In 1993, a survey found that 86 per cent of those polled agreed that 'trading fairly with a Third World country is a better way to help that country than giving aid' and 85 per cent thought that 'workers in the Third World are exploited and don't get enough for their produce'. Sixty-eight per cent would pay more for the product if they knew that the producer was receiving a fair return. Women (74 per cent) are more likely to pay higher prices for a fairly traded product, which bodes well for the shea butter producers since women are the main consumers of the cosmetics/ personal care sector that is one of the primary uses of shea butter.

However, in order to access and harness the potential demand for shea butter, the producers would need to increase production effectively and efficiently. Production methods that decrease labour time while increasing productivity and quality products will have to be implemented.

The research team made the following recommendations based on their study.

Recommendations

- Target the guidelines and specifications identified by European refining companies that currently constitute a significant and profitable market for shea butter. The specifications are minimal and offer the opportunity to supply large quantities.
- Tailor smaller quantities of shea butter for the North American natural, ethnic and cosmetic markets by meeting the minimal requirements as specified by the companies.
- Establish relations with ATOs to facilitate trade of shea butter in the international market.
- Carry out further research on the Japanese market for shea butter through the services of the UNIFEM national committee in Japan.
- Explore relationships with women's collectives in West and East Africa who are current suppliers of shea butter to the international market in order to exchange information about lessons learnt and export opportunities.
- Collaborate with Centre Canadien d'Etude et de Cooperation Internationale and UNIFEM, Dakar on efforts to effectively market the shea butter of Burkina Faso by strengthening the contacts initiated by the team in this study.

SOURCE: BEGURE, Z ET AL, 1997.



Activity 6.2: Focusing on the issues raised by the shea butter case study
From the information contained in the shea butter case study, answer the following questions.

1 Which elements of the international trade context affect the shea butter sector in Burkina Faso?

2 Which policy changes impact on the shea butter sector?

3 How can shea nut collectors/ shea butter producers respond to the international and national context?

4 What role have fair trade/ ATOs played?

5 What gender issues does the case study raise?

General points to consider/ discuss:

6 What are the major lessons learned from the Burkina Faso case study and how can these best be shared with other countries?

7 What is the relative importance of trade policy versus national economic and other support policies to producers? Is there a role for regional trade policies?

If you cannot answer any of these questions, note what further information you need.

Here's a final activity in this section to help you relate the issues in the case studies to your own country or region.



Activity 6.3: Relating the issues to your own country/ region

From the case study examples and your own experience, list what you see in your country/ region as

- the three main constraints and three main opportunities for women producers to link to global markets
- the three main constraints and three main opportunities relating to the integration of women workers in global value chains on more favourable terms.

You can focus on a particular sector or initiative as appropriate.

		Constraints	
		Producers	Workers
1			
2			
3			
		Opportunities	
		Producers	Workers
1			
2			
3			

Implementation strategies

What are successful implementation strategies to help independent producers link with global markets and to help women workers in global value chains to sell their labour on more favourable terms?

This section looks at strategies used in the case studies above. (The strategies are based on the final chapter 'Lessons Learned' in *Chains of Fortune*). First, it identifies six main factors to consider.

Factors

- national policy environment
- production systems: global value chains
- technology and competitiveness
- organising
- institutional support.

And finally a separate section on

- market access and markets.

National policy environment

We have seen in earlier units that trade policy can have both positive and negative impacts on women producers and workers. However, complementary and flanking national economic and social policies and legislation will be needed to:

- enable women producers and workers to turn positive changes in trade policy to their advantage
- enable women producers and workers adversely affected by changes in trade policy to overcome negative effects.

These other policies/ legislation include:

- financial policies – guaranteed loans (producers), microfinance (producers and homeworkers)
- infrastructure – transport, markets (producers)
- agricultural policies (producers)
- labour codes and laws (workers).

Production systems: global value chains

The case study examples cover a variety of models of production with different ownership and marketing arrangements. They emphasise the use of global value chains:

'A global value chain is the network that links the design, production and marketing processes that result in a commodity or product. Such chains link individual workers and enterprises, often operating under both formal and informal arrangements, spread across several countries and linked to one another within the global economy.' (GEREFFI, 1994)

Two kinds of global value chains have been identified: buyer-driven chains (e.g., in footwear and garment sectors) in which retailers govern production; and producer-driven chains (e.g., in automobile and electronic sectors) in which large manufacturers govern the process. Powerful buyers or producers determine every link in the chain – from production of inputs to the sale of final products – which can reach all over the world.

'Global Barbie'



'Global Barbie' is an example of a buyer-driven chain and shows how complex such chains have become. Barbie costs \$11.95 to buy in the US and is labelled 'Made in China'. But the parts and functions are global and only 50 cents goes to workers in China. Typically, in buyer-driven chains such as this, less than 10 per cent of the total sales price goes to local producers/workers with over 90 per cent going to designers, distributors and retailers in the North.

While originating in the manufacturing sector, global value chain analysis is increasingly being applied to horticultural and traditional primary products with similar results. In all applications, it represents an important tool to

map out where low-income women fit into the chain, as either producers or workers, and how the balance of power, access and returns can be altered.

Technology and competitiveness

The case studies show ways in which technology may be used or not used in relation to competitiveness. For example:

- For producers, it is possible to compete in export markets with the use of more labour-intensive technologies and smaller-scale production (Samoa, Mozambique examples).
- For workers, low-skilled labour could be replaced by advanced technology, but this could displace women's jobs and income (Bangladesh example).
- For workers, technological development facilitates the relocation and outsourcing of many jobs, but continued developments or competition could in turn make these jobs and skills redundant (India example).

Organising

The case studies cover a range of very different strategies and issues for producers and workers.

- For producers, the examples cover complex cooperative structures, small producer-based cooperatives and community/ cooperatively owned and operated processing units, all of which help women to gain access to economic resources and more control of the marketing chain.
- For workers, issues relate more to organising to bargain for better wages and working conditions, action on labour legislation at national and international level and the scope for trade union activity.

Institutional support

Support is offered by governments, UN agencies, bilateral agencies, international NGOs, fair trade and ethical trade organisations, academic and research institutions, national and regional NGOs, government agencies and the private sector.

For both producers and workers, government has a major role in creating a favourable national policy environment.

- For producers – the main role is taken by international NGOs and fair trade organisations, with some private sector involvement.
- For workers – the main role is taken by the private sector with limited involvement of unions and ethical trade organisations. International buyers can exert pressure on suppliers to observe at least minimum standards.



Activity 6.4: Relating the factors to your own context

At this point take a moment to reflect and to review the five factors discussed so far as they relate to your context and implementation strategies:

- national policy environment
- production systems
- technology and competitiveness
- organising
- institutional support.

For example, which of the five factors do you think is most important in enabling women producers and workers to benefit from trade liberalisation?

Why?

What action is needed to make factors more effective?

What further information or research is needed?

Market access and markets

Finally, let's take a more detailed look at markets and market access, the sixth important factor in enabling both women producers and women workers to take advantage of trade liberalisation.

- For women producers the issue is market access.
- For women workers the issue is getting better wages and working conditions within the market.

There are related activities at the end of the section.

Women producers

We look at three different strategies to enable women producers to access markets. They are:

- fair trade
- organic trade
- national export strategies.

Fair trade

What is fair trade?

- an alternative approach to conventional international trade that aims at sustainable development for excluded and disadvantaged producers through providing better trading conditions, awareness and campaigning
- a general term, meaning retailers and buyers are willing to try to give poor producers a better share of the total costs
- related to corporate social responsibility, which is also about trying to improve the share of poor producers and workers
- a term used strictly ('Fairtrade') to describe products certified by the Fairtrade Labelling Organizations International (FLO)
- unlikely to expand significantly, so one of its main purposes is to advocate for all trade to be fair.

Goals

- 1 To improve the livelihoods and well-being of producers by improving market access, strengthening producer organisations, paying a better price and providing continuity in the trading relationship.
- 2 To promote development opportunities for disadvantaged producers, especially women and indigenous people, and to protect children from exploitation in the production process.
- 3 To raise awareness among consumers of the negative effects on producers of international trade so that they exercise their purchasing power positively.
- 4 To set an example of partnership in trade through dialogue, transparency and respect.

- 5 To campaign for changes in the rules and practice of conventional international trade.
- 6 To protect human rights by promoting social justice, sound environmental practices and economic security.

Characteristics

Fair trade:

- has concern for the producer
- pays a premium on community projects
- guarantees a minimum price to avoid risks from price fluctuations
- offers relatively easy entry
- is growing rapidly:
 - sales in the US and Europe grew by 30 per cent in 2003 to US\$400 million
 - sales in the UK increased by 51 per cent from 2003 to £1,200 million in 2004
- is relatively small, involving less than 1 per cent of all goods traded and 800,000 producer families worldwide.

Women and fair trade

- Women are the majority of producers and consumers of fairly traded products – for example, 80 per cent of 100,000 producers in fairly traded handicrafts in Bangladesh.
- All fair trade organisations include respect for women in their criteria.
- Fair trade organisations aim to recognise the work of women, secure their employment, improve their income and ensure their access to technology, credit and decision-making processes.

Key players

- IFAT – International Federation for Alternative Trade (advocacy role; represents fair trade at the WTO)
- FLO – Fairtrade Labelling Organizations International (certifies independently monitored fair trade)
- NEWS! – Network of European World Shops (2,500 shops in Western Europe)
- EFTA – European Fair Trade Association (coordinates 13 European ATOs; advocates at the EU).

Successful examples in mainstreaming

- At policy level – there is more fair trade in Europe than in the US because there is more effective lobbying by fair trade organisations.
- At supermarket level – many UK supermarkets, including Marks and Spencer, now source all chocolate through fair trade.

- At local level – the Day Chocolate Company, part-owned by the cocoa cooperative in Ghana, is now influencing the mainstream retail market in the UK.

Some fair trade products

- FLO, which certifies Fairtrade products, covers a growing range, including bananas, honey, oranges, cocoa, cotton, dried and fresh fruits and vegetables, juices, nuts and oil seeds, quinoa, rice, spices, sugar, tea and wine. It also certifies sports balls.
- Some multinational corporations, such as Nescafe and Starbucks, now have a Fairtrade brand as a small part of their total business – sending out mixed messages to consumers. At the same time, Fairtrade companies such as Café Direct, which is now the 6th largest supplier of coffee in the UK, are becoming more mainstream.

Organic trade

Organic food can be defined briefly as food produced without the use of synthetic pesticides, herbicides, chemical fertilisers, growth hormones, antibiotics or gene manipulation.

- There is much overlap with fair trade, but organic trade is much larger: US sales were up from US\$1 billion in 1990 to US\$20 billion in 2005 and the European market is growing at 200 per cent per annum.
- However, there is no guarantee against price fluctuations.
- Entry/ certification is difficult and costly.
- There is a problem with niche markets, with success during one season leading to flooded markets and lower prices in the next.
- Part of the growth is due to multinational corporations (MNCs) coming into the act, but they are bringing down prices to the extent that small producers can't compete.

Pros and cons of organic trade

pros

- anchors traditional knowledge
- producer earns more
- fast growing market.

cons

- requires rigorous reporting, record keeping, updating knowledge
- requires barriers to provide boundaries of organic farm
- costly certification.

The key point is that most trade takes place in the mainstream. The questions then are:

- Can national export strategies work for poor women producers?
- What are the entry points for global markets and what are the conditions for market access?

Mainstream trade – national export strategies

Range of entry points for global markets

- direct foreign investment (DFI) and ownership
- large direct buyers
- initiatives by developing country producers
- alternative trade organisations
- export promotion agencies
- import promotion agencies
- aid programmes
- targeted technical research
- small enterprise promotion agencies.

Conditions for market access

(a) Understanding of the market

- 1 awareness
- 2 knowing buyers, including the perception that others can be different
- 3 knowing tastes
- 4 knowing and understanding standards

(b) Organisation of the firm

- 5 production equipment
- 6 investment capital
- 7 working capital
- 8 labour
- 9 appropriate technology
- 10 quality and reliability of good or service
- 11 appropriate organisation of firm

(c) Communication and transport links

- 12 efficient local transport and communications
- 13 efficient international transport and communications

(d) An appropriate policy environment

- 14 appropriate legal framework – for example. land tenure
- 15 acceptable tariff system and non-tariff barriers
- 16 appropriate additional trading environment – for example, exchange rates.

SOURCE: PAGE 2003.

In terms of mainstream trade and national export strategies, all the different entry points affect the conditions for market access in different ways. For example:

- DFI and foreign ownership is likely to meet all the conditions, including adequate resources.
- Developing country producers may not have the necessary understanding of the market, may need to find or create the organisational elements (capital, technology, etc) and will probably not have access to efficient communication and transport or enjoy an appropriate policy environment.
- ATOs are likely to be somewhere in between the two.

Women workers

As already stated, the key issue for women workers is bargaining for better wages and working conditions within the market.

We look at two different approaches to enabling this:

- ethical trade
- codes of conduct.

Ethical trade

- deals with women workers in global supply chains
- is driven by concerns of brand image in destination country
- concentrates on ensuring that working conditions meet minimum standards
- involves codes of conduct implemented due to pushes by consumers (but these are difficult to monitor).

Successful examples of ethical trade

- Vietnam Business Links Initiative – sports equipment
- Atlanta Agreement, Sialkot, Pakistan – leather footballs
- Ethical Trading Initiative (ETI) of the UK – a network of NGOs, unions, academics and MNCs created in 1997 to oversee the codes of conduct of supplier conditions put together by high street retailers.

Codes of conduct

- There is growing interest in codes of conduct to implement minimum labour standards.
- Many MNCs now pursue social auditing and engage with NGOs and ATOs on standards for workers in their supply chains.
- Supply chain verification and social audits are increasingly part of the local business mix, especially in South and South-East Asia, and Southern Africa.
- Voluntary codes extend labour standards across national boundaries/ jurisdictions, and along international corporate supply chains.
- However, some people are sceptical, particularly if there is no independent verification, and many codes leave out the principles of freedom of association and collective bargaining

Can progress be sustained?

Finally, if there is progress in enabling women to take advantage of trade liberalisation, is this sustainable? Some emerging issues:

- There is increased import competition for producers – e.g., the impact of the import of Chinese silk on Bangladesh and Indian markets.
- There may be flooding of niche markets – e.g., Brazilian melons did well in the UK one year, then the following year there was too much production in response. How to balance supply and demand?
- Non-tariff trade barriers are going up as tariffs come down. A good example is the Sanitary and Phytosanitary (SPS) Agreement (which deals with food safety and animal and plant health measures). When signed in 2001 few least-developed countries (LDCs) could comply. ATOs have helped several countries since then with technical assistance and advice.
- There is concern about a race to the bottom. How long can countries go on competing with each other to offer cheaper and cheaper women's labour – for example, in the garment sector? (see Case study 6.5 on women garment workers in Bangladesh).
- There is continued technological change – e.g., the impact on ICT employment in India (see Case study 6.6 on women call centre workers).



Women producers

Activity 6.5: Applying the case studies to your own context

Gaining market access

Look through the case studies in this unit. Identify three advantages and three drawbacks of the different strategies for gaining market access.

Fair trade

Advantages

- 1
- 2
- 3

Drawbacks

- 1
- 2
- 3

Organic trade

Advantages

- 1
- 2
- 3

Drawbacks

- 1
- 2
- 3

National mainstream export strategies

Advantages

- 1
- 2
- 3

Drawbacks

- 1
- 2
- 3

Note which advantages and drawbacks apply to a particular product/ industry in your country/ region.

Reminder: You may not have all the information you need. Bring in other knowledge and identify gaps where you need more information.

The next two activities consider how strategies can be applied in a more practical way.



Activity 6.6: Developing a fair trade (or organic) case study

Develop your own fair trade (or organic) case study based on an actual example (or one that might become an example).

Make notes and describe it under headings like:

What is the product?

Where is it made/ grown?

Who makes/ grows it?

How is it marketed?

What is its potential?

You could also do a PEST and SWOT analysis for the product (see Unit 7 Tools #4 for this).



Activity 6.7: Developing a gender and national export strategy

Develop your own case study of engendering a national export strategy.

Use the export promotion strategy guidelines (Unit 7 Tools #11) for this.

Show what changes are needed (indicating what, where, who, how, etc) to embed gender concerns into the strategy.

Base the activity on an actual national export strategy if available.



Women workers

Activity 6.8: Improving working conditions

Look through the case studies again. Identify three positive examples of ethical trade initiatives and codes of conduct and three examples where they have failed to have – or have not yet had – an impact.

Note which apply to a particular industry/ sector in your country.

Note opportunity points where the approaches of ethical trade and codes of conduct could have a positive impact.



- Choose a local case study and analyse it in relation to the benefits, obstacles and impacts from the beginning of this unit or to the questions raised about the shea butter case study (in Activity 6.2).
- With a group, get them to design and plan marketing for a local product. Use this to discuss the wider issues raised.
- With a group, do a 'consultant for a day' activity. Ask participants to draw up advice and guidelines for a local product/ initiative to include options for fair trade, organic trade and mainstream trade.
- Identify a tool from Unit 7 Tools (#9 Value chain analysis, #10 Star diagram or #12 Business appraisal questionnaire) and apply to a local example – e.g., carry out a value chain analysis of the tourist industry.
- Research local labour legislation and discuss the impacts in relation to the issues raised by this unit. Include differences between firms producing for export markets and domestic markets.



Key reading Unit 6 (on CD-ROM)

'Lessons learned' from Carr, M (ed) (2004) *Chains of Fortune: Linking Women Producers and Workers with Global Markets*, Commonwealth Secretariat, London, pp 197–215.

Unit review

Use this review of what has been covered to assess your progress. Look again at the unit objectives and check if you can now do them. Look through your answers to the activities and see if you want to add to them.

This unit has covered the following main points:

- case studies to show how women producers and workers in developing countries can take advantage of new economic opportunities
- strategies for women producers to gain access to global markets
- ways women workers can access better wages and working conditions within global value chains.

To recap, the learning objectives for the unit were to:

- identify ways women producers and workers can take advantage of trade liberalisation if enabled to do so
- learn from examples and case studies of initiatives, and relate them to your own context
- outline the pros and cons of different strategies for accessing markets (e.g., fair trade, organic trade, national export strategies) and gaining

better wages and working conditions (e.g., ethical trade, codes of conduct).

References

Begure, Z et al (1997) 'Local to Global: The international market for shea butter', unpublished paper, UNIFEM, New York.

Carr, M (ed) (2004) *Chains of Fortune: Linking Women Producers and Workers with Global Markets*, Commonwealth Secretariat, London.

Gereffi G (1994) 'The Organization of Buyer-Driven Global Commodity Chains: How US Retailers Shape Overseas Production Networks', in Gereffi G and M Korseniewicz (eds) *Commodity Chains and Global Capitalism*, Praeger, Westport, CT.

Page, S (2003) 'Towards a global programme on market access: opportunities and options, report prepared for IFAD', Overseas Development Institute, London. (See particularly Table 1 'How different initiatives affect the necessary conditions for market access'.)

7 Tools

Units 7, 8 and 9 are a resource for capacity building. They are designed to be used in conjunction with the briefing material in Units 2–6, not as stand-alone units.

Throughout the action guide there have been suggestions for activities and approaches to get gender onto the trade agenda and to enable women producers and workers to take advantage of trade liberalisation. This unit brings together 12 selected tools for these purposes, with short examples of how they might be used, particularly for training purposes.

These approaches are based on the Commonwealth Secretariat Gender Section's work on gender and the multilateral trading system and globalisation, and its experiences of organising regional workshops and capacity-building events. There are, of course, many other tools and many more possible uses available.

The unit will help you to:

- identify useful tools for particular purposes
- apply tools to activities in the action guide or to real situations.

In this unit

Overview
Influencing
Informing
Joining the global economy

Overview

The 12 tools are grouped under:

Influencing

- 1 Checklist: Trade policy development – bringing in gender issues
- 2 Checklist: Influencing trade negotiators
- 3 Forcefield analysis
- 4 PEST and SWOT analysis

Informing

- 5 Gender analytical framework 1: Harvard framework
- 6 Gender analytical framework 2: Longwe framework
- 7 Trade impact review
- 8 Developing a case study

Joining the global economy

- 9 Value chain analysis
- 10 Star diagram
- 11 Export promotion strategy guidelines
- 12 Producer organisation and small enterprise capacity appraisal

Influencing

1 Checklist – Trade policy development: bringing in gender issues

Example of use: as an exercise for officials, to help them clarify their task.

<p>Why? Why are you doing this? What do you hope to achieve in the end?</p>	
<p>What? What are your specific objectives? E.g.,</p> <ul style="list-style-type: none"> • policy changes • legal changes • favourable climate • more resources • improving competitiveness • improving livelihoods • poverty reduction <p>What are your priorities?</p> <p>What are your indicators of success?</p>	
<p>Where? Where are the entry points?</p> <ul style="list-style-type: none"> • regulatory and legal frameworks • labour legislation, International Labour Organization (ILO) core conventions • human rights legislation • gender agreements (the Convention on the Elimination of All Forms of Discrimination against Women – CEDAW, etc) • Millennium Development Goals (MDGs) • poverty reduction strategy papers (PRSPs) • trade and export promotion strategies • enterprise development • national sectoral policies (e.g., tourism, food processing) <p>What sector/agreements are you aiming at?</p> <p>What level are you aiming at?</p> <ul style="list-style-type: none"> • micro • national • regional • international 	

<p>When?</p> <p>How important is timing for your intervention? E.g., is there a</p> <ul style="list-style-type: none"> • trade negotiation cycle? • electoral cycle? • funding cycle? <p>What about</p> <ul style="list-style-type: none"> • practicalities of timing? • funding? • availability of staff? 	
<p>Who?</p> <p>Who are you targeting/ who are the policy makers?</p> <ul style="list-style-type: none"> • government • politicians • civil servants/ ministries • NGOs • international bodies • regional/ sub-regional trade institutions • export promotion boards • development agencies • WTO and EU <p>Who are the other stakeholders?</p> <ul style="list-style-type: none"> • civil society organisations/ NGOs • women's organisations • business organisations, including organisations of businesswomen and women producers/ exporters • academic institutions <p>Who should participate in policy-making?</p>	
<p>How?</p> <p>Identify your own next steps here</p>	

2 Checklist: Influencing trade negotiators

This checklist provides some key questions for a trade negotiator – what does a trade negotiator need to know in order to integrate gender issues into negotiations?

Example of use: as a checklist to prepare a briefing for a trade negotiator.

What is the negotiator's mandate and who provides it?	
How does gender fit into the legal/negotiating framework in which the negotiator is operating?	
How can negotiations incorporate gender needs and interests?	
What are the gender issues that need to be kept in mind when negotiating?	
How can trade and gender issues be made compatible?	
What are the specific objectives the negotiator is expected to achieve to get the best deal for the country – and how can a gender lens be applied to any trade offs?	
<p>What practical tools does the negotiator need? E.g.,</p> <ul style="list-style-type: none"> • reliable data about impacts • reliable predictions of future impacts • information about possible obstacles • arguments for making the case • identified opportunities • identified entry points 	

3 Forcefield analysis

Forcefield analysis is a helpful tool for weighing up the pros and cons of a proposed change or action. It also allows you to assess the implications of changing the forces for or against.

Example of use: to develop a clearer picture of possible support or opposition to plans to integrate gender analysis into trade negotiations.

Use the grid below to carry out a forcefield analysis, following these steps:

- 1 Describe your plan or proposed change in the middle.
- 2 List all the forces for this change in the column on the left and all the forces against it in the column on the right, under the headings Rules, Resources, People, Power.
- 3 Give each one a score from 1 (weak) to 5 (strong).
- 4 Total the scores.
- 5 You can then weigh up the forces for and against.
- 6 Decide if it is worth proceeding.
- 7 Think of ways to reduce the strength of the forces against or strengthen the forces for.

Forces FOR change	Score	CHANGE PROPOSAL	Forces AGAINST change	Score
<i>Rules</i>			<i>Rules</i>	
<i>Resources</i>			<i>Resources</i>	
<i>People</i>			<i>People</i>	
<i>Power</i>			<i>Power</i>	
Total score FOR			Total score AGAINST	

4 PEST and SWOT analysis

Two other helpful tools are PEST (political, economic, social, technological) analysis and SWOT (strengths, weaknesses, opportunities, threats) analysis. Both are useful in workshops or brainstorming sessions and are often done together. It is best to do the PEST analysis first, before the SWOT analysis.

Example of use: as part of research to develop an initiative to encourage women producers to access global markets.

A PEST analysis helps you to identify external factors that may affect a planned action or change.

Use the template below to identify factors of each type. If you wish, you can also rank them to assess their importance

Subject for PEST analysis:	
Political	Economic
Social	Technical

A SWOT analysis identifies some internal (strengths and weaknesses) and some external (opportunities and threats) factors for an organisation, team or group of stakeholders that may affect a proposed action or change.

Again, fill in the template below with factors identified.

Subject for SWOT analysis:	
Strengths	Weaknesses
Opportunities	Threats

Informing

As you have seen throughout this action guide, gender analysis is essential to provide sound data to influence policy makers and negotiators and as a basis for action.

Gender analysis asks questions systematically about differences between women and men in a given population. It examines their roles and activities, resources and constraints, benefits and incentives. It involves collecting sex-disaggregated data about the population in question.

Frameworks

Here we give examples of two frameworks that we find practical and easy to use: the Harvard framework and the Longwe framework. However, there are also a number of other frameworks (see for example the ILO/ SEAPAT online course: <http://www.ilo.org/public/english/region/asro/mdtmanila/training/unit1/whatmenu.htm>).

5 Gender analytical framework 1: Harvard framework

Example of use: to collect and organise information on gender issues.

The Harvard analytical framework is a diagnostic tool that asks the key questions:

- Who does what?
- Who has what? – land, resources, access
- Who has control? – of time, land, access – and who benefits?

It aims to:

- make an economic case for allocating resources to women as well as men
- help the design of more efficient projects.

The framework is designed as a matrix for collecting data at the micro level. It has four interrelated components:

- activity profile
- access and control profile (resources and benefits)
- constraints and opportunities profile (influencing factors)
- project cycle analysis.

The Harvard analytical framework is useful for collecting and organising information and for introducing discussions on gender issues. However, it is efficiency rather than equity oriented, and the analysis may be carried out in a non-participatory way.

Activity profile

Activities	Women/ girls	Men/ boys
<p>Production activities</p> <p>Agriculture: Activity 1 Activity 2, etc</p> <p>Income generating: Activity 1 Activity 2, etc</p> <p>Employment: Activity 1 Activity 2, etc</p> <p>Other:</p>		
<p>Reproductive activities</p> <p>Water related: Activity 1 Activity 2, etc</p> <p>Fuel related:</p> <p>Food preparation:</p> <p>Childcare:</p> <p>Health related:</p> <p>Cleaning and repair:</p> <p>Market related:</p> <p>Other:</p>		

Access and control profile

	Access: Women/ Men:	Control Women/ Men
Resources Land Equipment Labour Cash Education/ training, etc Other		
Benefits Outside income Asset ownership Basic needs (food, clothing, shelter, etc) Education Political power/ prestige Other		

Constraints and opportunities profile (influencing factors)

Description	Opportunity	Constraint
Economic/ demographic conditions		
Institutional arrangements		
Norms and values		
Political environment		
Legislation		
Training and education		
Other		

SOURCE: MARCH ET AL, 1999.

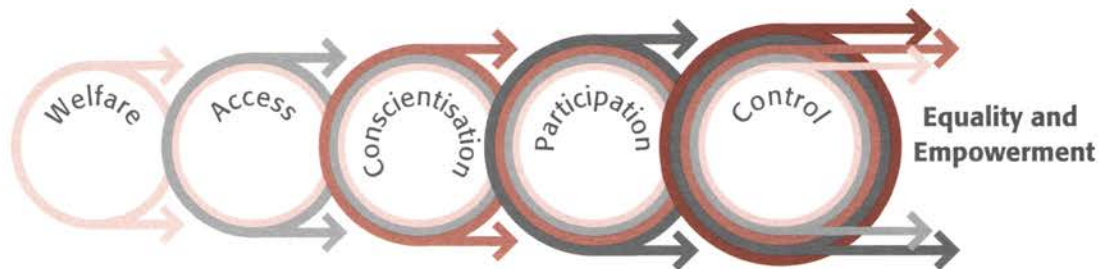
The **project cycle analysis** consists of a series of key questions to ask at each stage of the project cycle.

6 Gender analytical framework 2: Longwe framework

Example of use: to measure levels of equality in relation to women's empowerment.

This analytical framework aims to achieve women's empowerment by enabling women to achieve equal control over the factors of production and to participate equally in the development process. It introduces the idea of five levels of equality by which to assess the level of women's empowerment in any area of economic or social development.

Women's Equality and Empowerment Framework



SOURCE: UNDP, 2001.

Tool 1 measures the levels of equality.

Welfare – material welfare (income, food supply, health care)

Access – to factors of production such as land, credit, labour, training, marketing facilities, public services and benefits

Conscientisation – being aware of the difference between sex and gender, recognising that gender roles are cultural and can change

Participation – equal participation at all levels of decision-making, policy development, planning and administration, particularly in development projects

Control – over decision-making processes, to achieve balance of control between women and men over resources and benefits.

Tool 2 measures levels of recognition of 'women's issues' in project design. It includes three levels of recognition – negative, neutral and positive.

The women's empowerment framework develops the notion of practical and strategic gender needs into a progressive hierarchy. It shows that empowerment is an essential element of development and aims to change attitudes. But it ignores other forms of inequality and does not track how situations may change over time. It may give the impression that empowerment is a linear process.

Women’s empowerment framework for a country programme

Tool 1

Sector	Project	Level of concern with women’s development				
		Welfare	Access	Conscientisation	Participation	Control
Agriculture						
Education and training						
Commerce and industry						
Women’s projects						

Tool 2

Levels of recognition	Negative	Neutral	Positive
Levels of equality:			
Control			
Participation			
Conscientisation			
Access			
Welfare			

SOURCE: UNDP, 2001.

7 Trade impact review

Example of use: a trade impact review can be used as a tool to analyse the impact on women of a change in trade policy for a commodity (e.g., bananas).

- The first diagram illustrates links between changes of different kinds. For example, it shows the way a change in household income may have several causes and several effects.
- The second diagram is a flow chart of questions that can be used to carry out a gender assessment of trade agreements.

1 Trade impact review: links between different changes



SOURCE:
GAMMAGE ET AL,
2002.

2 A flow chart of key questions for a gender assessment of trade agreements



SOURCE: GAMMAGE ET AL, 2002.

8 Developing a case study

Case studies are an effective and interesting way of providing information to influence policy makers and negotiators. Here two approaches are described:

a) more formal case studies as a systematic method of qualitative research

Example of use: to demonstrate specific impacts of a change in policy on a particular industry (e.g., Mozambique sugar).

b) shorter case studies as illustrations for training or capacity building

Example of use: to provide a local example for a training session to make a more general issue come alive (e.g., local tourism in relation to GATS).

a) Formal case studies

A case study is a particular method of qualitative research. Case study methods involve an in-depth, longitudinal examination of a single instance or event: a case. They provide a systematic way of looking at events, collecting data, analysing information and reporting the results. Case studies lend themselves especially to generating (rather than testing) hypotheses.

Case studies can be used to:

- illustrate opportunities and challenges
- explore issues
- understand what works/ what doesn't
- explore practical examples of a process or theory
- explain concepts
- demonstrate a topic
- make material more accessible and illuminating.

Writing a case study

Step 1: Before you write: Understanding the issues involved

To write a good case study you will need time to understand the issues involved, the local context (i.e. cultural and historical aspects) and the people with whom you will be working. Early on explain to partners/ stakeholders your interest in writing a case study. Indicate the purpose of the case study and ask for their assistance as your work progresses. The more your partners view this exercise as an active learning opportunity rather than an evaluation of their work, the better.

Step 2: Laying out case study components

Discuss the development of the case study. You can use the outline of case-study components in this document as a basis for discussion with stakeholders or partners. Working through these case-study components together will generate ideas, lead to further reflection, identify information sources, and define and refine the focus of the case study.

Identifying the challenge

Identify the 'challenge' that needs to be addressed or the 'problem' that needs solving. Identify the economic, social, political and environmental costs and benefits involved.

The context

Identify historical data pertinent to understanding the case or events contributing to and/or resolving the 'challenge'. What organisational and personal factors contributed to the challenge at hand and/or its solution? What are the formal processes or informal norms, including cultural factors and gender relations that influence the decision-making processes and interpersonal or organisational behaviour?

Key decision makers

Who are the critical actors and what are their perspectives on the challenge or problem and the choices facing them? To which organisations do the key decision makers belong? What are the objectives of the organisations involved? Identify the target groups of the organisation. Who do they serve? What is expected of them?

Stakeholders

In addition to the decision makers, who else is involved or likely to be affected by the action to be taken? Do they hold opposing positions or interpretations on what the course of action should be?

Conclusion

What decision was made, course of action pursued or dilemma resolved? Not all case studies require a description of the outcome, but understanding how the challenge was addressed through the reform project will make a good conclusion to your case study.

Step 3: Organising your case study

After you map out the components of your case study and begin to collect your data, your next task will be to organise the information and present it in a compelling manner to capture the interest of the reader. A possible outline (adapted from Stake, 1995) is:

- Executive summary
- Opening vignette
- Identify purpose of the case, and origins and issues involved
- Develop an 'objective' picture of the challenge or problem
- Drill down on key issues and perspectives
- Outcome/ resolution
- Analysis of issues and lessons learned.

b) A case study for training

Two examples of ways you can use the case study method for training are:

- to help participants explore an issue
- to give participants practice in applying conceptual frameworks and tools to real-life situations – for instance, a description of an organisation could be used to give participants practice in developing a strategy.

Some points to remember:

- Ideally, a case should not be a work of fiction. It should be an account of an actual situation, preferably one that the trainer is familiar with. If you decide to use a fictional situation, make sure that it is as near as possible to real life.
- The amount of information to be included in the case depends on the purpose. While redundant information should be edited out, there should be enough detail to bring the situation to life.
- The write-up of the case should be brief and crisp, and the language used should be completely non-judgemental. Avoid or change names.
- Follow up the description of the situation by a few questions (two or three at most) that will form the task for the group.
- It is absolutely essential to test the case study before using it in a real training situation. You could ask another trainer to read it and answer the questions, or try it yourself. This will help you to refine the exercise, adding information and editing out unnecessary detail, fine-tuning and rewording the questions and getting an idea of the time necessary for the exercise.
- A case study need not always be a written document. Many trainers use films or film clips as case studies.

Joining the global economy

9 Value chain analysis

Example of use: to identify where low-income women fit in the chain as producers or workers and to improve conditions.

What is a global value chain?

As explained in Unit 6:

'A global value chain is the network that links the design, production and marketing processes that result in a commodity or product. Such chains link individual workers and enterprises, often operating under both formal and informal arrangements, spread across several countries and linked to one another within the global economy.' (GEREFFI, 1994)

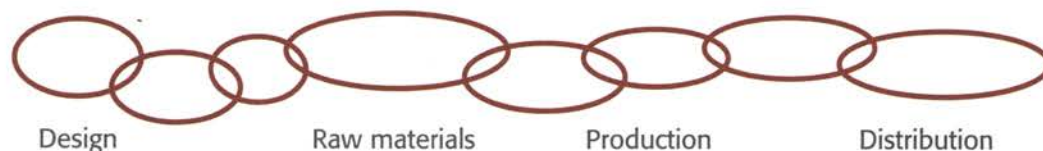
Two kinds of global value chains have been identified: buyer-driven chains (e.g., in footwear and garment sectors) in which retailers govern production; and producer-driven chains (e.g., in automobile and electronic sectors) in which large manufacturers govern the process. Powerful buyers or producers determine every link in the chain – from production of inputs to the sale of final products – which can reach all over the world.

While originating in the manufacturing sector, global value chain analysis is increasingly being applied to horticultural and traditional primary products with similar results. In all applications, it represents an important tool to map out where low-income women fit into the chain, as either producers or workers, and how the balance of power, access and returns can be altered.

In this unit, this tool just outlines the basic principles of value chain analysis to develop a broad picture. This brief account is based McCormick and Schmitz, 2002. You should consult this manual if you want to plan a larger-scale analysis.

The diagram shows a typical value chain at its simplest. It includes all of a product's stages of development, from its design to its sourced raw materials and intermediate inputs, from its marketing to its distribution to the final consumer.

Chain of value-adding activities



SOURCE: MCCORMICK AND SCHMITZ, 2002.

Any value chain has a number of characteristics.

- 1 The input-output structure – the flow along the chain. There is also a flow of knowledge and expertise.
- 2 The geographic spread – some chains are truly global (like the Barbie doll chain illustrated in Unit 6); others involve just a few places.
- 3 Control and governance
There are four main types:
Market – firms deal with each other mainly in ‘arm’s length’ exchange transactions.
Balanced network – firms form networks in which no one firm or group of firms exercises undue control over the others. Firms prefer to deal with other members of their networks.
Directed network – firms form networks that tend to be controlled by certain lead firms. The lead firms specify what is to be produced by whom, and they monitor the performance of the producing firms.
Hierarchy – firms are vertically integrated so that they can directly control all or most of the activities of the chain.

The purpose of value chain analysis

- It shows how value is created at different stages and by different activities.
- It helps to explain the way trade takes place – for example, the amount of trade that occurs within trading networks.
- It is of practical use as a way to understand problems and find ways of improving the situation of those in the chain who are poorly paid and have little bargaining power.
- It can also increase understanding of
 - problems of market access
 - challenges and opportunities relating to production
 - the distribution of gains along the chain
 - leverage points for policy and organising initiatives
 - funnels for technical assistance.

Once the basic value chain has been mapped out, it becomes possible to examine different aspects such as gender issues.

Mapping the chain

Mapping a value chain means giving a visual representation of the different stages in the chain and the connections between actors in it. In its simplest form it is a flow diagram. A basic map can show many variables, e.g., number of workers, wage levels and gender-related data.

Before constructing a map, define your question. What is the overall question you are seeking to answer? What are the sub questions?

Stage 1: Collect information and draw an initial map that gives the basic structure or framework of the chain. This will show:

- the main activities carried out locally
- their connections to activities elsewhere
- the connections to the final market
- some indications of size and importance.

Stage 2: Add data to the map. For example:

- quantify key variables
- identify strategic and non-strategic activities
- show the gender composition in these activities
- identify leverage points for action.

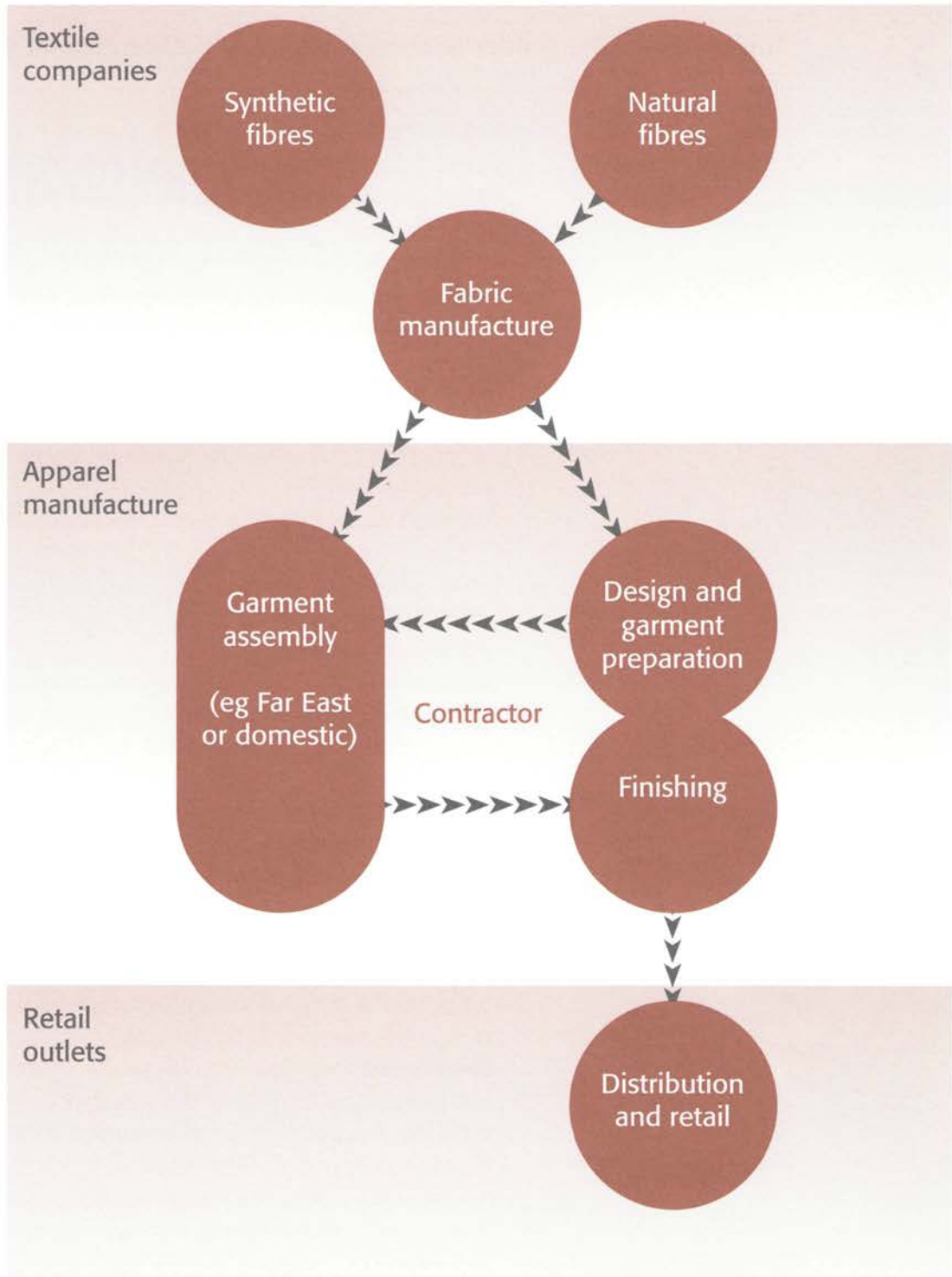
Don't overload one map with too much information. Start with broad categories and then provide separate sub-maps if needed. Try to grasp the broad picture as early as possible before you invest too much energy in any one part.

Here are two illustrations of simple value chains:

From bean to bar – the cocoa marketing chain



A fashion-oriented chain



Adding gender analysis to value chain analysis

This relates to the gender analysis approaches outlined earlier in this unit.

Step	Tasks
1 Basic information	Gather basic information about those you intend to study: <ul style="list-style-type: none">• demographic data (e.g., age, sex, marital status, education level, training)• labour force data (e.g., years in present job, previous experience, rate of pay, benefits, working conditions)• roles in household, community, industry.
2 Context	Gather comparative information: <ul style="list-style-type: none">• demographic and labour force data for country as a whole• demographic and labour force data for the industry in other producing countries• women's and men's roles in household, community, industry.
3 Enterprise assessment	Gather information about: <ul style="list-style-type: none">• rules: how things get done• activities: what is done• resources: what is used, what is produced• institutional patterns: who is in, who is out, who does what• power: who determines priorities and makes the rules.
4 Application	Use the results of the first three steps to answer questions such as the following: <ul style="list-style-type: none">• What is the burden of work for women and men in this segment of the industry?• Do women and men have the resources required to work in this segment of the industry? What is lacking and why?• What are the material rewards and costs for women and men in this segment of the industry?• What are the intangible rewards and/or costs for women and men in this segment of the industry?• What are the prospects for advancement for women and men in this segment of the industry?• To what extent do women and men determine the priorities and/or make the rules governing this segment of the industry?• How do the positions of women and men in this industry compare with their positions in industry in general in this country?• How do the positions of women and men in this industry compare with their positions in the industry in other countries?

10 Star diagram

Example of use: to reveal gaps between buyers' requirements and producers' performance.

A star diagram is a tool that can be used in value chain analysis and market research. It is also known as a radar chart.

It is used to compare sets of data – for example, to compare the views of buyers and producers or buyers' assessments of two competing regions. This tool is now available in the software program Microsoft Excel (go to Insert > chart > radar).

The information about this tool and the example is based on McCormick and Schmitz, 2002. The manual contains further guidance about using the technique.

This example describes the use of a star diagram to compare the views of global buyers and local producers.

Questions for producers

Use a table similar to the one below, with your questions down one side and the ratings, from 1 to 5, across the top. One is considered the least important rating and 5 the most important.

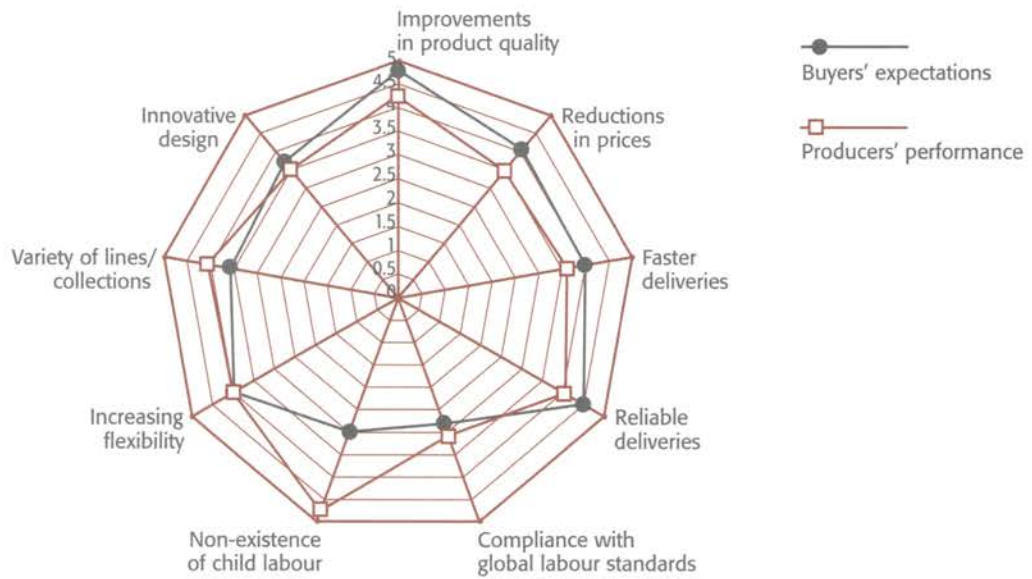
Ask your producer respondents to rate issues in terms of the importance placed on them by their main customers.

	1	2	3	4	5
Improvements in product quality					
Reductions in prices					
Faster deliveries					
Reliable deliveries					
Compliance with global labour standards					
No child labour					
Increasing flexibility					
Variety of lines or collections					
Innovative design					

Next ask the same respondents to rate the same issues in terms of how successful they believe they are in meeting their customers' requirements.

The following star diagram shows the results of a survey of producers using the above questions. The authors note that 'you can see that producers feel that they are satisfying their buyers in most aspects and even exceeding their expectations in some instances' but that it is 'good to be suspicious' about radical results, as companies may be reluctant to reveal, for example, that they use child labour.

Requirements of buyers and performance by producers: Producers' point of view

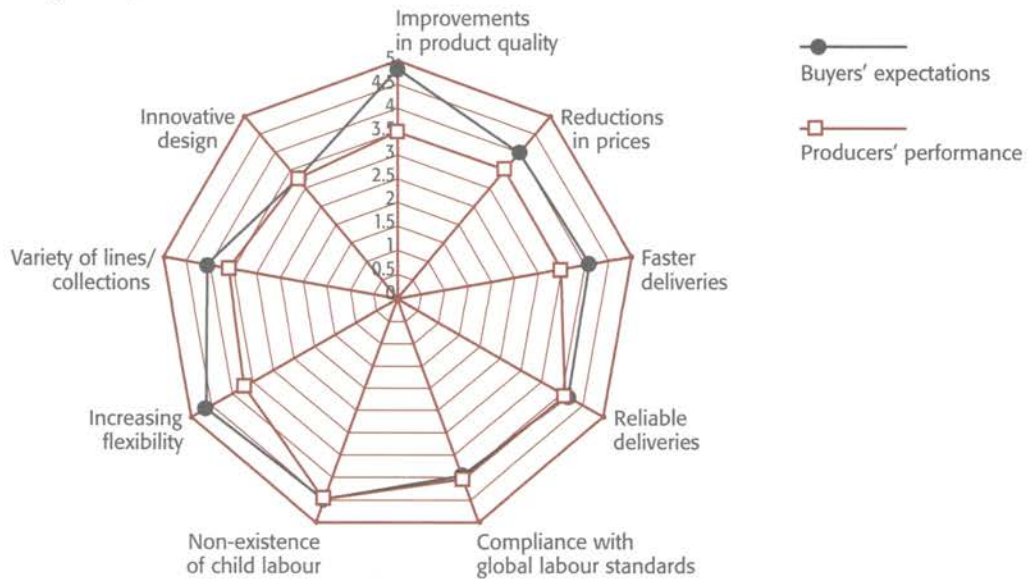


Questions for buyers

The next step is to ask buyers the same set of questions and compare them with the results obtained from the producers.

The second star diagram shows how different the perceptions may be from the point of view of the buyers.

Requirements of buyers and performance by producers: Buyers' point of view



This exercise can reveal the gaps between what producers and buyers require and the ways in which producers may fall short of buyers' requirements.

11 Export promotion strategy guidelines

Example of use: as a tool to identify the key steps to prepare a realistic export development strategy for a product or industry sector.

The strategy development process involves the completion of 13 steps.

Process Fundamentals	1	Ensure Private Sector Leadership and Public Sector Support	
	2	Ensure Comprehensive Scope	Border-In Border Border-Out Development
Analysis – Where are we now?	3	Start with a Thorough Assessment of the Sector	Benchmark the Sector's Business Environment Assess Competitors Review Main Markets, Current Performance and Capacity to Respond Evaluate Current Approach to Export Development
	4	Apply Value Chain Analysis, Identify Critical Success Factors and Assess Value Options to:	Acquire Greater Value Retain Greater Value Add Value Create Value Distribute Value
	5	Confirm Client Demands and Needs	Current Participants in the Value Chain Potential Participants in the Value Chains Aspiring Participants in the Value Chain
	6	Review Essential Trade Support Services	Competency Development Trade Information Trade Finance Export Quality Management Other Support
	7	Assess Available Resources within Public and Private Sectors	Finance Institutions Programmes People
	8	Prepare a SWOT Analysis	

Strategic Focus – Where do we want to be?	9	Create a Vision	
	10	Specify Priorities	
Formulation and Management – How do we get there?	11	Establish the Framework for Managing and Monitoring the Strategy	Confirm Strategic Considerations Determine Objectives Specify Performance Measures Set Targets
	12	Formulate a Plan of Action	Specify Initiatives Identify Responsible Organizations Allocate Resources Set the Implementation Schedule
	13	Maintain the Public-Private Partnership for Strategy Implementation	

SOURCE: INTERNATIONAL TRADE CENTRE, 2006.

The complete guidelines that cover each step in detail can be downloaded from: <http://www.intracen.org/execforum/ef2006/Strategy-Tools/Product-Sectors-En.pdf>.

12 Producer organisation and small enterprise capacity appraisal

Examples of use: a) as a guide/ checklist to help assess an enterprise's capacity with an enterprise's employees and to help structure discussions on development needs and priorities; b) as a guide for producer organisations to assess their own capacity.

(Note: This tool has been produced by Oxfam GB. It has not at date of publication of the action guide been checked by Oxfam for use with a wider publicising audience.)

This aim of this tool is to help Oxfam staff, partners and enterprises (Es) or producer organisations (POs) assess the organisational development needs of these Es and POs. Oxfam's *Producer Organisations: A Practical Guide to Developing Rural Enterprise* gives a more detailed analysis and potential solutions to issues raised in this assessment.

Assessing an E's capacity is not a matter of ticking boxes. While a simple checklist can help Oxfam, our partners and Es identify some areas of capacity, many others – such as grassroots ownership or business strategy – cannot be assessed meaningfully in this way. There is also a risk that use by Oxfam and partners of such checklists to conduct their assessment of the E may seem threatening to E employees and undermine their trust and openness. This trust and openness is essential because effective capacity development depends on the PO recognising where it needs to develop its capacity – it is not enough for Oxfam and partners to recognise the PO's weaknesses.

The appraisal tool is divided into nine sections. Each section starts with a summary of the core capacities that Es generally need to develop to become strong and sustainable businesses and organisations. Not all of these core capacities will be relevant, so please adapt the tool to your own context. These core capacities are followed by a set of questions to support further analysis.

1. Capacity of Grassroots Members/ Enterprise Staff	
<p>Core capacities</p> <ul style="list-style-type: none"> + E members/staff have basic understanding of the E and feel responsible for its success + Women and other marginalised groups are able to participate in decision-making of the E on an equal basis and are not constrained by limited confidence, time, capacity or other members' attitudes + PO's 'grassroots' members have the necessary knowledge, skills and confidence to participate in decision-making + PO's grassroots members see themselves as the owners of the organisation and feel responsible for its success. 	Score 1 – 5
<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Do women and men have the same opportunities in the E (skill-development, promotion, participation in decision-making, etc.)?</i> • <i>Are the E's vision and mission known and understood by most people in the E?</i> • <i>Do they have the literacy, numeracy and skills to understand the E's constitution, financial reports and business plans?</i> • <i>Do E staff have the necessary skills to carry out their duties or, if not, are adequate training plans in place?</i> • <i>Do grassroots members/ junior staff have the confidence to participate actively in management and organisational meetings or at the PO's AGM?</i> • <i>Are all categories of grassroots members (e.g. men and women, members of different social or ethnic groups) represented in the PO's leadership, at each level of the PO?</i> • <i>Do members make voluntary contributions to the PO that indicates ownership?</i> • <i>How easy is it for grassroots members, in particular women or members of other marginalised groups, to stand for election and become leaders?</i> 	
2. Organisational Governance and Management	
<p>Core capacities: governance rules and structure</p> <ul style="list-style-type: none"> + E's constitution or other written documents clearly define its purpose, governance rules, structure and duties/ responsibility of members, leaders and managers + E's leaders have defined terms in office/ contracts and understand the business + Members/ staff have trust and confidence in the leadership and managers + Leaders are able to respond to and manage internal and external change 	Score 1 – 5

<p>Further analysis</p> <p>Governance rules and structure</p> <ul style="list-style-type: none"> • <i>Does the E have a clear and non-discriminatory membership/ employment policy?</i> • <i>Do the E's leaders and members/ staff have a clear understanding of their individual roles, functions and responsibilities within the E?</i> <ul style="list-style-type: none"> - <i>Does the E have a written manual or constitution? (e.g. statutes or internal rules; written roles for staff or committee members)</i> - <i>Is there an up-to-date organigram? (i.e. a diagram showing how the E is organised)?</i> • <i>How effective is the E's governance structure in ensuring managers are accountable to members/ staff but also have sufficient freedom to run the business effectively?</i> • <i>Are the PO's governance structures fair and transparent, clearly defining the authority and responsibilities of members, leaders and managers?</i> • <i>Do plans exist to increase the capacity of marginalised members to participate in the PO's decision-making processes?</i> <p>Social capital</p> <ul style="list-style-type: none"> • <i>Do E owners or members see the E as their own idea and their own organisation? Do they talk about the E as an external initiative?</i> • <i>Are members/ staff committed to the E and willing to forego short-term benefits to secure long-term gains?</i> • <i>To what extent do grassroots members/ junior staff trust the leaders/ managers of the E?</i> • <i>Is communication effective within individual groups and between different levels of the PO?</i> <p>Leadership</p> <ul style="list-style-type: none"> • <i>Do the E's leaders have a clear vision for the E?</i> • <i>Do the E's leaders and managers have the necessary leadership and management skills to perform their tasks effectively or are training plans in place?</i> • <i>Does the PO have rules that prevent conflicts of interest between leaders' political engagements and representing members' interests?</i> 	
<p>3. Enterprise Structure</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + E's legal structure fits its business needs and organisational priorities + E's size, structure and growth plans are based on business needs defined in a business strategy + E's growth plans are sustainable and realistic in terms of existing level of business income, management capacity and social capital 	<p>Score 1 – 5</p>

<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Who owns the E and how are benefits distributed from E activities?</i> • <i>Is the E's legal structure the best fit within the existing legal framework of the country?</i> • <i>Is the E legally registered? Are taxes paid to the government? Does the E have title to land/ property?</i> • <i>How well does the organisational structure fit the business needs and the demands of the markets the E is operating in?</i> • <i>Does the E have a realistic growth strategy based on a business and market strategy?</i> • <i>Do accountability and communication systems for the E need to change to reflect any planned expansion in the future?</i> 	
<p>4. Marketing Capacity</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + E applies a market-oriented approach to all its activities and services + E has the capacity to conduct or manage market research and evaluate market opportunities + E has a strategy based on a market, production and members/ staff capacity assessment + E's marketing strategy takes into account potential risks 	<p>Score 1 – 5</p>
<p>Further analysis</p> <p>Market research capacity</p> <ul style="list-style-type: none"> • <i>Does the E have the resources to manage market research independently?</i> <ul style="list-style-type: none"> - <i>Have staff undertaken market visits or attended fairs to promote their products?</i> - <i>Does the E know who its competitors are in the target market(s)?</i> • <i>Can the E assess different market opportunities and select options?</i> <ul style="list-style-type: none"> - <i>What were the E's approximate sales (by % or in hard currency value) and costs last year and the number of buyers for each market: e.g. local markets, traders, export markets, processors?</i> • <i>Does the E have access to up-to-date market information?</i> <ul style="list-style-type: none"> - <i>From where is market information obtained on market demand, future trends, competition etc?</i> <p>Marketing strategy</p> <ul style="list-style-type: none"> • <i>Does the E's marketing strategy reflect its competitive advantage and reflect the capacity of members/ staff/ managers capacity?</i> <ul style="list-style-type: none"> - <i>Is there someone in charge of marketing and sales?</i> - <i>Can the E communicate in the language of target markets?</i> • <i>Does the E have a strategy for increasing the number of customers?</i> <ul style="list-style-type: none"> - <i>How does the E promote its business and communicate with customers and suppliers e.g. irregular meetings, planned meetings, letters, email, telephone, fax, catalogues, leaflets, website?</i> 	

<ul style="list-style-type: none"> • <i>Does the E have the capacity to implement the marketing strategy successfully i.e. do members have sufficient production capacity and managers' marketing skill?</i> • <i>To what extent does the E's marketing strategy balance profitability and risk?</i> 	
<p>5. Business Management</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + E has clear and realistic business strategy set out in a business plan + E's business is able to cover its costs/ wages and pay suppliers/ members or a realistic plan to covers these costs within a defined time frame + E covers its business costs including costs currently funded by donors, and manage cash flow, that enables timely payment to members/staff and suppliers/ service providers + E has access to sustainable financing sources 	Score 1 – 5
<p>Further analysis</p> <p>Business planning</p> <ul style="list-style-type: none"> • <i>Does the E have a business plan written by managers/ leaders covering several years?</i> • <i>Do PO leaders/ managers have the capacity to develop business plans?</i> • <i>Is the E's strategy outlined in the business plan consistent with its current activities and finances?</i> • <i>What investments, e.g. new equipment, will the E require to achieve its business targets?</i> • <i>Do the leaders/ managers and members /staff see the PO as an independent business that has to become financially sustainable?</i> • <i>Do PO members value the services provided by the PO and is this reflected in stable membership numbers or rising membership over preceding years?</i> <p>Financial management</p> <ul style="list-style-type: none"> • <i>Are E managers able to assess the profitability of the business based on an assessment of actual and hidden costs?</i> • <i>Does the E have access to long-term affordable financing to fund operational and investment plans?</i> - <i>Has the E ever received a bank loan?</i> • <i>Does the E have an annual budget and does it produce regular financial reports?</i> • <i>Is the E's payment system to members/ staff transparent and understood by all members/ staff?</i> - <i>Are wages above legal minimum? Are women paid the same as men for work of equal value?</i> • <i>Does the E have an effective cash flow management system?</i> • <i>Does the E have an agreed transparent system for distributing</i> 	

<p><i>business profits to its members?</i></p> <p>Financial systems</p> <ul style="list-style-type: none"> • <i>Does the E have trained accounting staff and effective accounting systems?</i> • <i>Does an independent auditor audit the E's accounts?</i> • <i>Does the E have the equipment and resources to manage its finances efficiently and securely?</i> <p>Operational management</p> <ul style="list-style-type: none"> • <i>Does the E have adequate office facilities and communications infrastructure to conduct its business?</i> • <i>Is the E aware of any positive or negative impact it has on the environment?</i> • <i>Do the managers have the necessary experience and skills to manage the business effectively or are there training programmes in place?</i> <ul style="list-style-type: none"> - <i>Can the E react to buyers' requests in a timely manner?</i> <i>Give examples</i> • <i>Does the E need to develop the capacity of its staff in key areas and does it have the resources to fund these investments?</i> • <i>Are there mechanisms (group meetings, trade union representation etc.) for consulting members/ employees on business decisions?</i> 	
<p>6. Production Capacity</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + Leaders/ managers understand the quantity, quality and reliability demands of buyers and can keep in touch with changing demands + E has logistical systems to coordinate production to meet market demand + E has quality management and internal incentive systems to meet market demands + E's investments in quality management, productivity or certification will generate the income necessary to cover the ongoing costs of these investments 	<p>Score 1 – 5</p>
<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Do managers understand buyers' preferences and the standards demanded by target markets?</i> <ul style="list-style-type: none"> - <i>Does the E have specifications for its products?</i> - <i>Is the E aware of legal regulations concerning its products e.g. phytosanitary regulations?</i> - <i>Does the product require special packaging? If so, is this done by the E?</i> • <i>Does the E need to upgrade producers' skills or make investment in technology?</i> • <i>Do premises/ workplace have sufficient space, illumination, and ventilation? Are there health risks?</i> 	

<ul style="list-style-type: none"> • <i>Does the E have the systems and resources to gain independent certification of its products?</i> • <i>Do producers have the capacity to produce the quality and quantity of products demanded by buyers?</i> <ul style="list-style-type: none"> - <i>Is there a production plan and is the PO's production capacity known?</i> - <i>Does the E have sufficient equipment for production?</i> - <i>Where are the products stored?</i> • <i>Does the E have the necessary systems and resources to monitor and control production quality?</i> <ul style="list-style-type: none"> - <i>Does the E have an inventory of stocks and/or equipment, managed by someone?</i> - <i>Have problems that could/ do affect production been detected? (What are the major problems e.g. quality of raw materials, lack of credit or stocks etc.)?</i> • <i>Do members understand, support and trust the PO's quality management and related incentives system?</i> <ul style="list-style-type: none"> - <i>Are there records of rejected products, customer complaints, raw materials, productivity etc.?</i> - <i>What happens to rejected products? (Is there a system for rejecting sub-standard products and removing them from normal sales?)</i> 	
7. Market Linkages	
<p>Core capacities</p> <ul style="list-style-type: none"> + E has sufficient bargaining power to negotiate acceptable prices and good terms + Managers/ leaders/ staff have confidence to negotiate sales + E is able to assess market opportunities and up-to-date market information + E has a good reputation with buyers for quality and reliability 	Score 1 – 5
<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Do E staff have the experience, confidence and skills to negotiate business deals independently?</i> <ul style="list-style-type: none"> - <i>What local, national and international networks is the E a member of?</i> • <i>What competitive advantage does the E have in each marketing chain it operates within e.g. price, quality, scarcity of its product, its size, traditional design etc?</i> • <i>Can the E identify new market opportunities and select options?</i> <ul style="list-style-type: none"> - <i>How often does it meet or discuss business with current buyers?</i> - <i>Does the E keep a record of buyers and potential buyers?</i> • <i>Does the E have confidence that member producers or suppliers will honour advance contracts, even if other buyers offer them better prices?</i> 	

<ul style="list-style-type: none"> • <i>Does the E have experience of working with target traders e.g. local traders, processors, wholesalers, direct consumers, export agent?</i> • <i>Is the E's reputation in the market based on its business record or the involvement of another party, e.g. a specialist support agency?</i> 	
<p>8. Access to Business Services</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + E is able to access all necessary business and development support services + E has a long-term strategy to finance business services from business revenue + Leaders/ managers have the capacity to negotiate service contracts 	Score 1 – 5
<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Do leaders/ managers have the capacity to assess what business service the E needs e.g. transport, insurance, production training?</i> • <i>Can the E access and afford the business services it needs to conduct and develop its business?</i> • <i>Does the E have a strategy to access essential business services that are currently unavailable?</i> • <i>Will the E have the resources and capacity to access and afford independent business services once the FA withdraws its support?</i> 	
<p>9. Advocacy Capacity</p>	
<p>Core capacities</p> <ul style="list-style-type: none"> + E can defend and promote its own/ its member's interests in the market environment + E has the necessary skills, financing, structure and networks to conduct effective advocacy work (if it is a priority) + PO's advocacy priorities are driven by the needs and priorities of its members 	Score 1 – 5
<p>Further analysis</p> <ul style="list-style-type: none"> • <i>Do leaders/ managers have the time, confidence and skills to negotiate or meet with other representative organisations and policy makers?</i> • <i>Does the E have access to the research and policy resources and networks necessary to conduct effective advocacy work?</i> • <i>How are members/ staff compensated for giving up time to lobby external organisations or attend meetings.</i> • <i>If the E plans to or is already engaged in advocacy work, whose advocacy priorities and interests are driving this work?</i> • <i>Does the E have the financial resources to fund existing or planned advocacy activities and, if not, how will it fund these in the long run?</i> 	

- | | |
|---|--|
| <ul style="list-style-type: none"> • <i>What steps will the E take to ensure any existing or planned advocacy work does not divert essential resources away from the business?</i> | |
|---|--|

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8 Planning training

Throughout the action guide there have been training suggestions and further activities for people responsible for helping others learn about trade and gender.

This unit now offers a selection of training scenarios and ideas for capacity building. These approaches are based on the Commonwealth Secretariat Gender Section's work on gender and the multilateral trading system and globalisation, and its experience in organising regional workshops and capacity-building events.

The unit will help you to:

- plan a training or capacity-building programme fit for your purpose
- choose and adapt from the action guide to suit the needs of your programme and your learners.

In this unit

Planning your programme
Adapting the action guide
Training and capacity building examples

Planning your programme

This section of the unit outlines the main steps involved in planning a programme. These may be familiar to you, but you can use the steps as a checklist or reminder.

Step 1 Do a learning needs analysis

Even if you are not providing formal training, you should do a learning needs analysis to find out more about the participants and what they expect to get out of the programme. Use the action guide to give you ideas about content and activities.

A learning needs analysis means asking the key questions: Who? Why? What? When?

- Who has asked for this training (individuals? institution?)
- Who will be the participants?
- Why do they want the training? What is it for (e.g., in relation to wider institutional aims or individual participants' own objectives)?
- What do they hope to get out of the training; what is their motivation?
- What do they already know?
- What is their educational background/ skills level/ approach to learning?
- What do they want to learn? What are the main learning objectives?
- What kind of time do they have available?
- When do they want the training?

Perhaps you can give a questionnaire to the people involved (institutions, stakeholders, participants) or hold a discussion group to find out about the learning needs.

- Draw up a learning needs analysis, using the information you collect.

Step 2 Plan the programme

Planning answers to the other key question: How?

On the basis of the learning needs analysis, plan your programme, setting out:

Aim – a broad statement that sums up the purpose of the whole programme.

Objectives – what you want participants to know or be able to do by the end.

Outline timetable – work out whether objectives can be achieved in the time available.

Introduction and evaluation – allow time for these.

Pre-reading and follow up – plan these in.

- Do a rough plan of the programme.

Plan individual sessions. Bring together the learning needs analysis, aim and objectives, timing, choice of methods (e.g., group discussions, case studies, lectures or talks), choice of materials, teaching notes, teaching aids, handouts and so on.

- Complete the plan of the programme.

Adapting the action guide

The action guide has offered many activities and training suggestions. The next section outlines a number of possible training scenarios. Though you may not find an activity or programme that exactly matches your purpose, you can adapt them to your group and their needs.

Adapting the action guide materials involves the same steps as planning a programme or individual activity. To recap:

- start with a learning needs analysis
- define the aims and objectives
- outline the timing, allowing for all elements and any preparation
- plan the programme (or session, or activity).

Then see if any of the activities in the action guide or the training examples in the next section match your needs analysis and aims and objectives. Which units or resources are most relevant? If none of the activities or examples are exactly what you want, work out why. For example:

- Learning needs analysis – there's a different learner profile or motivation, different institutional context or requirements.
- Aim and objectives are different from the ones you have defined.
- Examples, case studies or handouts are not relevant for your participants.
- Methods/ exercises are not appropriate for your group – too formal or too informal.
- Level of difficulty or language level – may be pitched too high or too low for your group.
- Timing unsuitable – activity may be too long or comes at the wrong point of course/ programme.

Note which parts could be rewritten or redesigned, so that they meet your group's needs. For example, you could adapt a section or unit by picking and mixing different activities from the action guide, or you could follow the general outline of an activity with a similar aim and objectives, but change parts of it.

- **Adapt content:** Find relevant material to use as examples, case studies and handouts – e.g., local material fitting a national, regional

or institutional context or a different sector. Sources could be higher education, NGOs, grey literature (i.e. documentary material that is not commercially published such as reports, working papers and conference proceedings), media, grass roots. Choose topical material.

- **Adapt process:** Adapt to your learners – their learning approach, education level, prior knowledge, e.g., participatory approach for learners from women’s NGOs, more formal for ministers, senior officials or academics. Rewrite handouts/ exercises in simpler language or alternatively make activities more challenging.

Finally draw up a new plan combining existing and new elements. If possible, test out your plan with another trainer or someone similar to your participants. Revise if necessary.

Training and capacity building examples

Here are six examples of trade and gender training and capacity-building activities, with outline programmes, showing how they might make use of the action guide.

- 1 a week-long regional capacity-building workshop, for middle managers from both trade and gender
- 2 a one-day workshop with a single country focus, for a combined audience of trade and gender specialists from the same country
- 3 a half-day high-level briefing for policy makers (e.g., permanent secretaries from ministries)
- 4 a one-day briefing for experienced gender and trade trainers
- 5 a team-building programme, for women producers and other stakeholders
- 6 supporting a self-study programme for individuals or groups of learners.

Read through the examples to get ideas of the possibilities.

1 A week-long regional capacity-building workshop

Participants: middle managers from both trade and gender

Aim: To build capacity to integrate gender analysis into trade policy and implementation, using a regional perspective

Objectives:

- define key concepts relating to gender and trade
- describe trade framework and environment
- identify key issues of the multilateral trading system in the region
- identify key issues of regional and bilateral trading systems in the region
- identify ways of enabling women producers and workers to take advantage of trade opportunities
- select and use tools you need to achieve your purpose
- plan appropriate ways to take action.

Draft programme

MONDAY	Morning	Welcome and introductions Explain purpose of workshop Concepts: shared learning on gender and trade (Unit 2)
	Afternoon	Introduction to trade policy environment (Units 2 and 3) Links between trade/ poverty/ gender Impacts Identify local issues and outline problems to solve; present project for the week Activity: emerging issues
TUESDAY	Morning	MTS – outline how it works and issues involved (Unit 4) Select a sector and work on a local case study/ or divide into groups and work on different sectors; identify information needs
	Afternoon	Exercise on influencing policy (Unit 7 Tools – influencing) Panel/ role play with speakers/ experts
WEDNESDAY	Morning	Regional and bilateral agreements (Unit 5) Apply to own region and do exercise on what to do to influence trade negotiations
	Afternoon	Review own local issues – present problems/ local cases. Consider team building/ networking approaches (Unit 7 Tools – informing)
THURSDAY	Morning	Joining the global economy (Unit 6) Introduction to relevant tools (Unit 7)
	Afternoon	Work on local examples – real or imaginary (Unit 7) Option: an outside visit to a local project to be analysed in terms of morning session
FRIDAY	Morning	Group work to prepare presentations on local issues or actions Groups present action plans: returning to topics of Monday
	Afternoon	Review and reflect
At end of each day		Resource team give short recap of what has been learned and look forward to next day; suggest any reading, thinking, discussion to be done overnight
Each morning		One local team gives short summary of previous day's content
Preparation		Some preparatory reading (e.g., the Bridge Pack)
Resource team		Workshop leader and trade and gender trainers.

2 A one-day workshop with a single-country focus

Participants: combined audience of trade and gender specialists from the same country

Aim: To provide briefing and update on latest trade negotiations and their implications

Objectives:

- shape understanding of basic concepts
- summarise essential information
- analyse how trade and gender affect one another in negotiations
- plan further joint action.

Draft programme

Morning

Introduction: current issues for country/ region
(e.g., state of play of EPAs negotiations)

Joint briefing exercise on gender and trade (Unit 2)

Identify local issues (Units 4/5)

Local sectoral case studies (Units 4/5)

Afternoon

Analyse implications/ role play
(e.g., participants take roles of policy maker, negotiator, NGO, etc; see, for example, Unit 7 Tools #1 and #2 on trade negotiations)

Do presentations about action required

Action planning

Preparation

A key reading and a preparatory exercise to identify local issues.

3 A half-day high-level briefing

Participants: policy makers (e.g., permanent secretaries from ministries)

Aim: To prepare participants to raise gender-related matters at trade negotiations (e.g., on RTAs, BTAs and multilateral trade negotiations)

Objectives:

- outline how gender issues affect RTAs, etc
- identify key issues to raise and trade offs
- rehearse key issues to raise.

Draft programme (time slots could be longer if policy makers have more time available)

Morning 10.00	Presentation: expert background briefing on gender implications for RTAs (etc) in region, including latest research and developments update (Unit 5)
	Discussion of background paper / summary
10.30	Presentation with visuals from women's organisations in region (Unit 5)
	Q and A/ discussion session
11.30	Develop memo of key points and how to tackle; discuss and agree.
Preparation	Participants to read background paper (or summary)
	Staff responsible for briefing should have already worked through the action guide or taken part in training based on it.

4 A one-day briefing for trainers

Participants: a team of experienced trainers with mixed trade and gender training experience who are to deliver the week-long regional workshop outlined above

Aim: To prepare the trainers to deliver the workshop

Objectives:

- identify key concepts and issues
- analyse needs of participants
- collect local information and examples
- plan the training programme.

Draft programme

Morning	
8.30	Work on activities from Unit 1 and 8 to identify and agree learning needs
10.00	Plan programme and activities and tools (relevant units)
11.30	Share local materials and agree resources to be used
Afternoon	
2.00	Work jointly to develop workshop activities (relevant units)
3.30	Agree on division of tasks Agree on and finalise programme
Preparation	Note: it is essential that the trainers work through the action guide before attending this briefing so that they all have the same basic knowledge of the issues. They need advance warning of this at least a month before Work through the action guide, and collect local materials and resources
During workshop	Review workshop and if necessary adjust programme and activities
At end of workshop	Evaluate and review Later follow up and networking

5 A team-building programme

Participants: mix of women producers and people from women's organisations, business organisations, enterprise units, ministries in a country

Aim: To set up a network with monthly meetings to enable women producers to take advantage of trade liberalisation

Objectives:

- clarify and agree on purpose of network
- evaluate local situation
- practise using business tools for analysis and planning
- take advantage of mutual support from networking.

Week 1

Team-building activity to clarify and agree on purpose of network

Week 2

Activities to explore local situation and place it in wider framework (e.g., from Unit 5 or 6); identify opportunities and barriers

Week 3

Practise using business tools for analysis and planning (Unit 7 Tools #9–12)

Week 4

Activities to plan and agree future of network and its organisation; schedule future meetings.

6 Supporting a self-study programme

Participants: a trainer (facilitator/ tutor/ mentor) working to support individual learners or groups of learners with different levels and objectives

Aim: To support learner(s) working through the action guide as self-study materials

The trainer has the role of mentoring and learner support. This could be provided at face-to-face sessions, online or by telephone.

Example: a trainer is supporting an individual learner who has a background in gender and development, but little knowledge about trade. She is in a new job role and wants to prepare for an international meeting in three weeks time when she must make a presentation.

Objectives

For trainer:

- help learner(s) learn effectively from their self-study programme.

For learner(s)

- clarify own learning objectives
- achieve own learning objectives.

Draft programme

Week 1	<p>Review Unit 1. Discuss learning needs, tasks and learning action plan. Decide which units to focus on and schedule timing</p> <p>Pinpoint any specific tasks with finish dates</p> <p>Help identify resources, sources of local information, people who can provide support</p>
Week 2	<p>Follow up</p> <p>Check progress (is learner up to date with agreed learning action plan?)</p> <p>Identify any problems, review objectives and timing</p>
Week 3	<p>Follow up</p> <p>Check progress (has learner completed what was agreed in the learning action plan by now?)</p> <p>Discuss plans for presentation</p> <p>Reflection and planning next steps (Unit 10)</p>
Preparation	<p>Learners work through Unit 1 before Week 1 session</p> <p>Trainer to get familiar with action guide.</p>

Activity

To end this unit, draw up a plan for the programme you wish to deliver.



Activity 8.1: Checklist

Learning needs analysis

Aim of programme

Objectives

Outline timetable

Individual session plans (if required)

Evaluation

Preparation or pre-reading

Follow up

Further reading

The *GMS Toolkit* (COMSEC, 2004) Action Guide Unit 8 Using the Trainers' Guide and the Trainers Guide itself provide many ideas about planning training, particularly gender training (COMSEC, 2004).

The Oxfam Gender Training Manual (Williams et al, 1995).

For ideas about materials, case studies and other further reading, see Unit 9 Resources.

References

COMSEC (2004) *GMS Toolkit: An Integrated Resource for Implementing the Gender Management System Series*, Commonwealth Secretariat, London and Commonwealth of Learning, Vancouver.

Williams, S with J Seed and A Mwau (1995) *The Oxford Gender Training Manual*, Oxfam Publishing, Oxford.

9 Resources

The action guide has brought you case studies, examples and key readings. Throughout you've been encouraged to find other resources suited to your context and purpose – local case studies, local briefings, relevant trade policy documents and plans, press coverage, data and online materials.

So what materials do you need for your task and how are you going to find them?

This unit will help you to

- decide what kind of resources you need
- plan how to find them.

The unit does not set out to provide a comprehensive list of everything you may need, but aims to help you in your search.

In this unit

What do you need?
Follow-up reading
Further suggestions
Regional resources
Finding further resources

What do you need?



Activity 9.1: Assessing your needs

What do you need? Think about your information and resource needs. Jot down notes on the following.

Why do you need more resources?

What kind of resources do you need?

Your reasons for needing more resources may include such things as:

- to be better informed
- to know more about general issues
- to inform and influence others
- to provide training or capacity building.

The kinds of resources you have thought of may include such things as:

- current research
- statistics
- hard evidence
- up-to-date academic thinking
- local examples
- model documents.

Look now through the sections that follow and note the resources – or kinds of resources – relevant to your needs.

Follow-up reading

If you want further reading to follow up the key readings in Units 2–6, your first option will be to read more of the recommended texts supplied on CD-ROM with this action guide. In turn, each of these contains extensive references and suggestions for further research and reading.

To recap, the recommended texts are:

Carr, M (ed) (2004) *Chains of Fortune: Linking Women Producers and Workers with Global Markets*, Commonwealth Secretariat, London.

Randriamaro, Z (2006) *Gender and Trade: Overview report*, A Cutting Edge Pack produced by Bridge, Institute of Development Studies at the University of Sussex.

Sever, C and L Narayanaswamy (2006) *Gender and Trade: Supporting resources collection*, A Cutting Edge Pack produced by Bridge, Institute of Development Studies at the University of Sussex.

Tran-Nguyen, A-N and A Beviglia Zampetti (2004) *Trade and Gender: Opportunities and Challenges for Developing Countries*, UNCTAD, Geneva.

Williams, M (2003) *Gender Mainstreaming in the Multilateral Trading System*, Commonwealth Secretariat, London.

Further suggestions

Unit 2 Concepts

Barrientos, S (2002) 'Gender, Business and Poverty', Resource Centre for Social Dimensions of Business Practice, Issue Paper No. 5, International Business Leaders Forum, London.

Cagatay, N (2001) 'Trade, Gender and Poverty', background paper for UNDP report on Trade and Sustainable Human Development.

Commonwealth Secretariat/ILO (2003) 'Trade Liberalisation Policy', Globalisation and Gender Briefs Series No 1, Commonwealth Secretariat, London and ILO, Geneva, <http://193.134.194.11/dyn/empent/docs/F2042326947/No%201%20Trade.pdf>.

Commonwealth Secretariat (2004) *The GMS Toolkit: An integrated resource for implementing the Gender Management System series*, Commonwealth Secretariat, London.

Evers, B (2002) 'Gender, International Trade and the Trade Policy Review Mechanism: Conceptual references points for UNCTAD', Paper for UNCTAD, <http://www.gapresearch.org/governance/BE%20evers%20unctad%20paper1.pdf>.

Fontana, M (2003) 'The Gender Effects of Trade Liberalisation in Developing Countries: A review of the literature', DP101 Discussion Papers in Economics, University of Sussex.

Reeves, H and S Baden (2000) 'Gender and Development: Concepts and definitions', report prepared for DFID for its gender mainstreaming intranet resource, Bridge, Institute of Development Studies at the University of Sussex.

Unit 3 The trade policy environment

Canadian International Development Agency (CIDA) (2003) 'Gender equality and Trade-Related Capacity Building: a resource tool for practitioners', [http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/GenderEquality2/\\$file/WEB-COVER-E.pdf](http://www.acdi-cida.gc.ca/INET/IMAGES.NSF/vLUIImages/GenderEquality2/$file/WEB-COVER-E.pdf).

International Trade Centre (ITC) (2001) 'Strategies and Approaches for Gender Mainstreaming in International Trade', ITC, Geneva, <http://www.intracen.org/UNCTADXI/genstrat.pdf>.

Keating, M (ed) (2004) *Gender, Development and Trade*, Oxfam, Oxford, UK, http://publications.oxfam.org.uk/oxfam/add_info_002.asp.

Staveren, I van, D Elson, N Cagatay and C Grown (due June 2007) *Feminist Economics of Trade*, Routledge, London.

Williams, M (2004) 'Gender, the Doha Development Agenda, and the Post-Cancun Trade Negotiations', in Keating (ed) above.

Unit 4 The multilateral trading system

Tran-Nguyen, A and A Beviglia Zampetti (eds) (2004) *Trade and Gender: Opportunities and Challenges for Developing Countries*, UNCTAD, Geneva.

- Peters, R, Chapter 4 'Multilateral negotiations on trade'.
- Hayashi, M et al, Chapter 5 'Gender related issues in textiles and clothing'.
- Puri, L, Chapter 7 'Trade in services, gender and development: A tale of two modes'.
- Teltscher, S and S Fondeur Gil, Chapter 14 'The role of IT in the promotion of gender equality'.

Commonwealth Secretariat/ILO (2003) 'WTO TRIPS Agreement', Globalisation and Gender Briefs Series No 2, Commonwealth Secretariat, London and ILO, Geneva, <http://www.ilo.org/dyn/empent/docs/F1599852333/No%2020-%20TRIPS.pdf>.

Unit 5 Regional and bilateral trade agreements

ECDPM. (2002) 'Cotonou Infokit', ECDPM, Maastricht, <http://www.ecdpm.org>.

Lebohang Pheko, L (2006) 'Gender review of the Economic Partnership Agreements', Brussels, http://www.igt.org/pdfs//460_Paper%20to%20the%20European%20Commission.pdf.

Oxfam (2006) 'The Vienna Summit: European Union-Latin American and Caribbean relations at the crossroads', http://www.maketradefair.com/en/index.php?file=reports_archives.htm.

Staveren, I van (2007) 'Gender Indicators for Monitoring Trade Agreements', WIDE briefing paper, <http://www.eurosur.org/wide/Staveren%20feb%202007.pdf>.

Stevens, C and J Kennan (2005). 'EU-ACP Economic Partnership Agreements: The effects of reciprocity'. Institute of Development Studies, Sussex, <http://www.thecommonwealth.org>.

WIDE (2001) '*Instruments for Gender Equality in Trade Agreements: European Union – MERCOSUR- Mexico*', WIDE.

Unit 6 Joining the global economy

Forstater, M, J MacDonald and P Raynard (2002) *Business and Poverty: Bridging the gap*, DFID/ Prince of Wales International Business Leaders Forum, London.

McCormick, D and H Schmitz (2002) 'Manual for Value Chain Research on Home Workers in the Garment Industry', Institute for Development Studies (IDS), UK, <http://www.ids.ac.uk/ids/global/pdfs/homeworkersllinkedforwebmarch.pdf>.

Page, S (2003) 'Towards a Global Programme on Market Access: Opportunities and options. International Fund for Agricultural Access', report prepared for IFAD, Overseas Development Institute, London, http://www.odi.org.uk/iedg/Meetings/market_access_report_IFAD.pdf.

Page, S and R Slater (2003) 'Small Producer Participation in Global Food Systems: Policy opportunities and constraints', *Development Policy Review*, 21(5-6) pp 641–654.

Redfern, A and P Snedker (2002) 'Creating Market Opportunities for Small Enterprises: Experiences of the Fair Trade Movement', SEED Working Paper No. 30, International Labour Office, Geneva, <http://www.ilo.org/dyn/empent/docs/F1057768373/WP30-2002.pdf>.

Schmitz, H (2005) 'Value Chain Analysis for Policy Makers and Practitioners', ILO, Geneva, http://www.ilo.org/dyn/empent/docs/F204969253/VCA_book_final.pdf.

Tallontire, Ann et al (2001) 'Ethical Consumers and Ethical Trade: A Review of Current Literature', Policy Series 12, Natural Resources Institute, University of Greenwich.

Regional resources

These are selected examples of regional resources, drawn from materials used at the COMSEC regional trade and gender workshops. This is not a comprehensive range, but illustrates the kind of documents that may be used in delivering training, capacity building and briefings on influencing and informing policy makers and trade negotiators.

Africa

Monson, K (2003) 'Responsible Business Practice: Lessons from Ghana, India and Trinidad and Tobago', International Business Leaders Forum, Tyler Consulting Ltd, Empretec Ghana Foundation, Business and Community Foundation.

Musonda, F and F Kessy (no date) 'Gender and Trade in East Africa', <http://www.esrftz.org/10/gender.pdf>.

Okello, B and ATPO UEPB(2005) 'Apiculture export strategy', Uganda Export Promotion Board and International Trade Centre

Stott, L and M Shunmugam (2002) 'Business and Gender Equality Lessons from South Africa', Prince of Wales International Business Leaders Forum, London.

Asia

Adhikari, R (2006) 'Bilateral Free Trade Agreements and Farmers' Livelihood: Issues for South Asian Countries, Policy Brief No. 13, South Asia Watch on Trade, Economics and Environment (SAWTEE).

Adhikari, R and Y Yamamoto (2006) 'Sewing Thoughts: How to realise human development gains in the post-quota world', Asia-Pacific Trade and Investment Initiative, UNDP regional centre, Colombo, http://www.undprcc.lk/Publications/Publications/TC_Tracking_Report_April_2006.pdf.

Carr, M, M Chen and R Jhabvala (1997) *Speaking Out: Economic Empowerment for Women in South Asia*, IT Publications, London and Sage, New Delhi.

Choudhary, B et al (2006) 'WTO and Gender Concerns in South Asia', Report UNIFEM-SOFCAR.

Jha, V (ed) (2003) *Trade, Globalization and Gender: Evidence from South Asia*, UNIFEM/ UNCTAD, New Delhi.

Monson, K (2003) 'Responsible Business Practice: Lessons from Ghana, India and Trinidad and Tobago', International Business Leaders Forum, Tyler Consulting Ltd, Empretec Ghana Foundation, Business and Community Foundation.

Montes, M and S Wagle (2006) 'Why Asia Needs to Trade Smarter', *Far Eastern Economic Review*, 169(5).

TIE Asia/ WWW (2003) 'Women working in the informal sector in Sri Lanka: Producing clothing and accessories for export', A Collaborative Action Research Project, Transnationals Information Exchange Asia/ Working Women Worldwide.

UNESCAP (2005) 'Women in International Trade and Migration: Examining the Globalized Provision of Care Services', Gender and Development Discussion Paper Series No. 16, UN Economic and Social Commission for Asia and the Pacific (UNESCAP), <http://www.unescap.org/esid/GAD/Publication/DiscussionPapers/16/Discussion%20Paper%2016.pdf>.

Caribbean

Banana Link (2001) 'Best of the Bunch: Fairtrade bananas from producer to consumer', <http://www.bananalink.org.uk/>.

CAFRA/ CPDC (2004) 'Gender Indicators on Trade', Caribbean Association for Feminist Research and Action/ Caribbean Policy Development Centre.

Davenport, M et al (2002) 'Caribbean Perspectives on Trade, Regional Integration and Strategic Global Repositioning', Final Report, ECORYS-NEI, for the European Commission

De Biolley, T et al (2005) 'Evaluation of the Commission's Regional Strategy for the Caribbean, Final Report, Volume 1, for the European Commission, <https://www.oecd.org/dataoecd/15/58/35120150.pdf>.

DFID (2004) 'Regional assistance plan for the Caribbean', DFID, London, <http://www.dfid.gov.uk/pubs/files/rapcaribbean.pdf>.

Dunn, L (1994) 'Education for Women Workers in Caribbean Export Processing Zones: Challenges and opportunities', ILO Labour Education.

ECLAC/CDCC (2000) 'Report of the Ad Hoc Expert Group Meeting on Gender and Macroeconomic Policies in the Caribbean', Economic Commission for Latin America and the Caribbean (ECLAC)/ Caribbean Development and Cooperation Committee (CDCC).

Monson, K (2003) 'Responsible Business Practice: Lessons from Ghana, India and Trinidad and Tobago', International Business Leaders Forum, Tyler Consulting Ltd, Empretec Ghana Foundation, Business and Community Foundation.

Price Waterhouse Coopers (2005) 'Sustainability Impact Assessment (SIA) of the EU-ACP Economic Partnership Agreements Phase 2 Final Report', Price Waterhouse Coopers Sustainable Business Solutions.

Spieldoch, Alexandra (2006) *Trade in the Americas: Women Central to the Debate*, Center of Concern, Washington, DC, <http://www.igtn.org/pdfs//TradeintheAmericas.pdf>.

Stuart, S (1997) 'The Gender Implications of Trade Policies in the Caribbean with Special Reference to NAFTA', study prepared for UNIFEM.

Tyler, G S and S D Tyler (2002) 'All Inclusive: Private-sector social and economic development initiatives in the Caribbean tourism industry', International Business Leaders Forum, International Hotels Environment Initiative and Tyler Consulting.

Wyss, B and M White (2004) *The Effects of Trade Liberalization on Jamaica's Poor: An analysis of agriculture and services*, Women's Edge Coalition, Washington, DC, http://www.igtn.org/pdfs//294_Jamaica%20Case%20Study.pdf.

Finding further resources

This section is intended to help you identify sources of further information.

Likely sources

Remember all the likely sources you could use – such as libraries and directories, electronic databases and the internet, journals, books, grey literature (official publications and documents, conference proceedings, dissertations and theses) or international, national or local press.

In addition, each of the recommended texts and many of the key readings contain extensive references and web links for relevant organisations and resources.

A starting point

The best place to start is with one of the recommended texts supplied on CD-ROM with this action guide:

Sever, C and L Narayanaswamy, L (2006) *Gender and Trade: Supporting resources collection*, A Cutting Edge Pack produced by Bridge, Institute of Development Studies at the University of Sussex.

This includes summaries of texts about gender and trade that provide overviews, case studies, tools, guidelines and other materials. Details of how to obtain copies or download the full texts are provided with each summary. There is a final section with a list of full contact details for organisations featured.

Selected websites

The following shortlist provides website details for selected organisations, many already referred to in the action guide, which may be useful for following up your work on the action guide.

APRODEV

<http://www.aprodev.net/trade/gender.htm>

Asia Gender and Trade Network (AGTN)

<http://www.igtn.org/page/391>

Bilaterals.org

<http://www.bilaterals.org>

BRIDGE Institute of Development Studies University of Sussex

<http://www.bridge.ids.ac.uk/>

Business for Social Responsibility

<http://www.bsr.org>

Canadian International Development Agency (CIDA)

<http://www.acdi-cida.gc.ca/equality>

- Caribbean Association for Feminist Research and Action (CAFRA)
<http://www.cafra.org>
- Commonwealth Secretariat
<http://www.thecommonwealth.org>
- Department for International Development (DFID) International Trade Department
<http://www.dfid.gov.uk/aboutdfid/organisation/intertradedept.asp>
- Development Alternatives with Women for a New Era (DAWN)
<http://www.dawn.org.fj>
- ELDIS Gender Resource Guide
<http://www.eldis.org/gender/index.htm>
- EPA Watch
<http://www.epawatch.net>
- Gender and Economic Reforms in Africa Programme (GERA)
<http://www.twnafrica.org/gera.asp>
- Gender Electronic Database of gender statistics and indicators (World Bank)
<http://genderstats.worldbank.org/>
- GenderNet
<http://www.worldbank.org/gender/>
- Global Fund for Women
<http://www.globalfundforwomen.org/>
- International Association for Feminist Economics (IAFFE)
<http://www.iaffe.org>
- International Finance Corporation (IFC) Gender Entrepreneurship Markets (GEM) Programme
<http://www.ifc.org/menagem>
- International Gender and Trade Network (IGTN)
<http://www.igtan.org/>
- International Labour Organization (ILO) Bureau for Gender Equality
<http://www.ilo.org/dyn/gender/gender.home>
- International Trade Centre (ITC)
<http://www.intracen.org>, <http://www.tradeforum.org>
- Natural Resources and Ethical Trade (NRET) programme, Natural Resources Institute
<http://www.nri.org/NRET/nret1.htm>
- One World Action
<http://www.oneworldaction.org>
- Organisation of Women in International Trade (OWIT)
<http://www.owit.org/officers.asp>
- Overseas Development Institute
<http://www.odi.org.uk>
- Oxfam: Gender and Development Journal
http://www.oxfam.org.uk/what_we_do/issues/gender/gad/
- Resource Centre for Responsible Business Practice (RCRBP)
<http://resource-centre.org>
- Siyanda (on-line database of gender and development materials)
<http://www.siyanda.org>
- UN Conference on Trade and Development (UNCTAD)
<http://www.unctad.org>

- UN Development Fund for Women (UNIFEM)
http://www.unifem.org/gender_issues/women_poverty_economics/
- UN Development Programme (UNDP) Gender in Development Programme
<http://www.undp.org>
- UN Division for the Advancement of Women (UNDAW)
<http://www.un.org/womenwatch/daw>
- Wikipedia
http://en.wikipedia.org/wiki/Main_Page
- Womankind Worldwide
<http://www.womankind.org.uk/>
- Women in Development Europe (WIDE)
<http://www.wide-network.org>
- Women in Informal Employment: Globalizing and Organizing (WIEGO)
<http://www.wiego.org>
- Women Working Worldwide (WWW)
<http://www.poptel.org.uk/women-ww/>
- Women's Edge Coalition (WEC)
<http://www.womensedge.org>
- Women's Entrepreneurship Development and Gender Equality (WEDGE)
http://www.ilo.org/dyn/empent/empent.portal?p_lang=EN&p_prog=S&p_subprog=WE
- Women's Environment & Development Organization (WEDO)
<http://www.wedo.org/>
- Women'sNet
<http://www.womensnet.org.za/>
- Womenwatch
<http://www.un.org/womenwatch>
- World Bank Economic Policy and Gender: Trade and Competitiveness programme
<http://web.worldbank.org/WBSITE/EXTERNAL/TOPICS/EXTGENDER/0,,contentMDK:20631274~menuPK:489451~pagePK:148956~piPK:216618~theSitePK:336868,00.html>
- World Bank Poverty Calculator
<http://iresearch.worldbank.org/PovcalNet/jsp/index.jsp>
- World Business Council for Sustainable Development
<http://www.wbcsd.org>
- World Trade Organization
<http://www.wto.org>



Activity 9.2: Next steps

Now you've looked through this unit, what resources – or kinds of resources – of interest to you have you noted?

Which are the three resources you need to find first?

What are the next steps you need to take in order to find them?

Unit review

This unit has covered the following main points:

- further reading to follow up the key readings in Units 2–6
- examples of regional resources, drawn from materials used at the COMSEC regional trade and gender workshops
- guidance on finding further resources – tools, literature reviews and contact lists.

To recap, the learning objectives for the unit were to:

- decide what kind of resources you need
- plan how to find them.

10 Planning action

The aim of this action guide has been to provide practical material to help people understand the links between trade and gender, poverty and development, and then to take action. It has aimed to make trade policy makers aware of the implications of gender issues; to integrate gender analysis into policy formulation; to sensitise export promotion officials to the need to integrate gender in all strategies; and to present options on ways in which women producers and workers can take advantage of new economic opportunities on more favourable terms.

In Unit 1 Getting started you defined your objectives and drew up a plan for working through the action guide. By now you should have added to your knowledge and understanding, related what you have learned to your own context and developed some practical tools. This unit will bring together what you have learned in an action plan that will help you move forward. It will help you to:

- develop an action plan
- plan reviews of your progress
- *reflect on your learning from the action guide.*

In this unit

Developing an action plan
Reviewing progress
Reflection

Developing an action plan

This activity asks you to apply the action guide learning to your main task in relation to trade and gender, as identified in Unit 1 Getting started. It reviews your planning in the light of what you have learned since. Look back at the first activity in the action guide (Activity 1.1: Defining the task) and refine and revise what you wrote there.

Activity 10.1: Planning for action



Your task What is your task in relation to trade and gender?

Purpose Why are you doing this? What do you plan to achieve?

Steps What steps can you break the task down into? What are your priorities?

Timeframe How long have you got?

Completion date?

Time (in hours/ working days) for task?

Who else is involved? E.g.,

- manager
- colleagues/ team
- staff
- client group/ audience
- networks

What are the gaps? What do you need in order to do the task that you don't yet have? E.g.,

- people
- information
- equipment/ resources
- skills
- other

How will you get them?

How will you know if you have succeeded in your task?

Next steps you will take over the next month to get started on the task?

Reviewing progress

To follow up your action plan, think of ways in which you can monitor your progress and evaluate and review your work. Questions to consider:

- Why will you review your work? (e.g., to report back, to check progress, to improve)
- When do you need to review progress? (e.g., after 1, 3, 6 and 12 months)
- What will you review? (e.g., what are the interim steps and how will you measure what you have achieved?)
- Who else will be involved? (e.g., self-evaluation, team effort, peer review, manager, formal human resources/ managerial appraisal systems)
- How will you carry out the review? (e.g., personal reflection, more formal evaluation following organisational monitoring/ evaluation systems)
- What kind of action do you expect to take as a result of the review? (e.g., revise plan, decide whether or not to continue).



Activity 10.2: Reviewing the plan

Why?
When?
What?
Who involved?
How?
Diary dates: write the review dates in your diary now.
Action?

Reflection

Finally, here is a chance to reflect on your learning from the action guide and how you can apply it to your task. Look back at Unit 1 Getting started and review your learning action plan at the end of that unit.

Activity 10.3: Reflecting on learning



What happened?

- What did you hope to get from the action guide?
- Which units did you work through?
- What did you learn?
- Did you meet your objectives?

How did you feel?

- What went well with your learning?
- What went less well?
- How did it compare with your expectations?

What could you have done differently?

- Approached the learning or task in a different way?
- Organised the timing differently?

What will you do differently another time?

And finally:

What will you do next to follow up on your learning?

Things you could do next

- Do further work following on from the action guide (e.g., further activities, work-based research or investigation, talking to colleagues); look back at the units and see if there are things you intended to do; work through units you left out first time round.
- Do more reading and research; look back and see if there are resources you identified.
- Do further training and development; do you plan more professional development?
- Fill in the feedback sheet to complete your reflection.



- Use the activities in this unit for collective reflection and planning. Agree who will do what and set dates for follow up.
- Ask participants to complete feedback sheet as part of this reflection and planning.

Unit review

Here is a final end-of-unit review for you to assess whether you have met the learning objectives. This unit has covered the following main points:

- reviewing your planning in the light of what you have learned since Unit 1
- building in plans for self-monitoring, evaluation and review
- a process for reflection.

To recap, the learning objectives for the unit were to:

- develop an action plan for what you hope to achieve in relation to trade and gender
- plan reviews of your progress
- reflect on your learning from the action guide.

Now you have come to the end of the action guide, we hope you will be able to move forward with greater confidence to fulfil your aims in relation to trade and gender.

TRADE AND GENDER ACTION GUIDE

Feedback sheet

Your name and organisation (optional)

What were your objectives in using the action guide?

How well did the action guide meet your objectives?

How do you intend to put what you have learned into practice?

Which parts of the action guide did you use?

Which parts did you find most useful?

Which parts (if any) were not useful?

Suggestions for improving the action guide

Any other comments

Thank you for your feedback.

Please photocopy and return this sheet to Advisor, Gender, Poverty Eradication and Economic Empowerment Programmes, Gender Section, STPD, Commonwealth Secretariat, Marlborough House, Pall Mall, London SW1 5HX, United Kingdom.

The links between gender, trade and development are increasingly being recognised. Developed out of a series of regional workshops, this *Action Guide* explores the different impacts of trade on women and men; provides practical tools on how to take advantage of the opportunities trade can offer to further development, alleviate poverty and promote gender equality; and suggests ways to get gender onto the international trade agenda.

The *Action Guide* is flexible and can be used by trainers or for self-study. It includes case studies, activities, training suggestions and recommended readings provided on CD-ROM and can be used as a basic introduction or as a resource to develop capacity building for others. It will enable people to take action and apply what is learned to their own context and requirements.

Aimed at a broad spectrum of people coming at the issues from many different angles of trade or gender – government officers in relevant trade sectors, gender specialists, NGOs, regional trade policy advisers and more – it is intended particularly for people who are responsible for capacity building and bringing about change, for example through training, briefing or lobbying.

