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# Gender, Inclusion and Trade Thematic Brief

## Integrating Gender and Inclusion into Prosperity Fund Trade programmes

**WOW Helpdesk Query 20**

For Prosperity Fund

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## Acronyms List

G&I	Gender and Inclusion on appraisal
GEOAT	Gender Equality Organizational Assessment Tool
GLRTFP	Great Lakes Region Trade Facilitation Project
GRIP	Genetic Resources and Intellectual Property
GTP	Global Trade Programme
IP	Intellectual Property
ITC	International Trade Centre
MIC	Middle Income Country
NTB	Non-Tariff Barrier
NTM	Non-Tariff Measures
ODA	Overseas Development Assistance
P-IMA11	Prioritising SPS Investments for Market Access 11
PF	Prosperity Fund
SIDA	Swedish International Development Agency
SMART	Strategic, Multifunctional, Accountable, Responsive and Transparent
SME	Small- to Medium-sized Enterprise
SPS	Sanitary and Phytosanitary Measures
STDF	Standards and Trade Development Facility
STEM	Science, Technology, Engineering and Maths
TBT	Technical Barriers to Trade
TMEA	Trademark East Africa
TRIPS	Trade-Related Aspects of Intellectual Property Rights
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organisation
WOW	Work and Opportunities for Women
WTO	World Trade Organisation
VSS	Voluntary Sustainability Standards

# Executive Summary

This brief synthesises evidence on the linkages between gender, social inclusion and trade, highlighting women's different roles in trade in selected middle-income countries (MICs). It identifies key evidence gaps relevant to the Prosperity Fund's (PF) focus on Non-Tariff Barriers (NTBs) to trade in MICs. It also summarises promising practices from existing interventions and identifies good practice tools and approaches for integrating gender and social analysis and appraisal into trade programming to support gender equality, women's economic empowerment and inclusive growth.

## Key Trade, Poverty and Gender Linkages

Trade may bring advantages for different individuals and social groups, however at the same time may enhance disparities between and among them. The relationships between trade, growth, poverty reduction and development involve specific and multiple direct and indirect pathways. The *gendered* impact of trade is also context-specific, multi-dimensional and multidirectional with often conflicting ways in which gender inequality impacts on trade expansion and vice versa. Women are impacted by trade in their multiple roles as workers, traders/producers, unpaid household workers, consumers, tax payers and as users of public services. Women's disproportionate responsibility for unpaid work in the household limits their ability to take up paid work and access the opportunities offered by trade, because of their time poverty and mobility constraints.

For effective policy development and programme design, delivery and practice, it is therefore critical to understand the gendered structure of the economy to be able to assess how and where different groups of women and men and their businesses may be differently affected – the winners and the losers. Robust social and gender analysis and impact assessment of trade policy interventions can help to identify, monitor and mitigate risk and unintended consequences for women, and other poor and excluded groups. It can also identify the underlying institutional barriers, gender gaps and social norms which perpetuate gender inequality and social exclusion. Finally, it can help identify ways to increase access to economic opportunities, assets, resources and decision-making for women and other marginalised groups that can support their empowerment and support transformational change for inclusive growth and sustainable poverty reduction.

## Evidence on Gender and Trade in MICs

Evidence is mixed on the gender differentiated barriers, opportunities or implications of changes in non-tariff barriers. Most research relates to tariff changes, but non-tariff measures that affect small and medium-sized firms may be particularly burdensome for women-owned firms (which tend to be smaller, concentrated in particular sectors and grow less quickly). In MICs, trade liberalisation has helped create employment and incomes for women and other marginalised groups but has also contributed to increased inequality and created new patterns of vulnerability.

Technical Regulations: Women are particularly affected by rules that regulate different aspects of traded sector activities, given their multiple roles as traders, workers, unpaid household workers, community members and citizens. Technical regulations can entail barriers of time, cost and access to information that are more likely to affect smaller-scale trade operations, where women exporters tend to be concentrated.

Standards: Most literature on gender and standards relates to sanitary and phytosanitary measures (SPS) in agriculture and food industries, which tend to employ and impact many women. Women are often located within precarious, part-time or seasonal jobs within value chains, which affects their prospects for upward mobility and skills upgrading. They may be especially vulnerable to changes induced by requirements for the standards compliance process. Evidence highlights the need for

gender-responsive policies and standards as well as capacity-building and skills upgrading for women in affected value chains.

Trade Facilitation: There are multiple gender and social dimensions to initiatives that aim to improve customs and border management (trade facilitation). Much of the evidence focuses on capacity building and gender-sensitive border infrastructure aimed at supporting small scale women traders in Africa, due to the prominent and visible role that these traders play in West and East Africa in particular. Less is understood about the gender dynamics of small-scale cross-border trade in other global regions. There is also limited evidence about the most effective interventions to reduce gender-based violence at borders, as well as the specific issues women face in relation to trade logistics.

Intellectual Property: Debate remains about the most appropriate mix of policies that promote both innovation and equality, but important aspects involve supporting gender-equitable benefit-sharing and protection of women's rights in relation to food, medicine and indigenous knowledge in particular.

### **Good and Promising Practices**

General Trade reforms: the **United Nations Conference on Trade and Development (UNCTAD): Trade and Gender Toolbox** provides a broad framework to evaluate the likely impact of trade reforms on women and gender inequality, prior to implementation.

Technical regulations: the **Standards and Trade Development Facility (STDF) P-IMA11 framework** supports better decision-making in developing countries on how to choose between competing investments to build **SPS capacity** and boost agri-food exports, focusing on gender and social impact criteria to ensure that women are involved in decision making.

Standards: it is essential that **national standards bodies work to identify NTBs** which are most likely to raise gender issues. Combining delivery of both in-depth and longer-term **training and mentorship** for women with measures that **address the broader entrepreneurial ecosystem and macro-level constraints** are likely to have significant impact.

Trade facilitation: the **Gender Equality Organizational Assessment Tool (GEOAT)** can assist customs agencies to improve border operations and engagement with stakeholders.

Intellectual Property (IP): efforts to increase women's representation within Science, Technology, Engineering and Maths (STEM) occupational fields, compulsory licensing to produce basic medicines and provisions which prevent patenting of biological materials are seen as best promoting gender responsive IP.

### **Tools and Approaches for Analysis and Appraisal**

Several key gender and trade frameworks can help improve understanding of the links between micro-level, institutional and larger macroeconomic issues as well as women's different roles in the economy, which is a pre-requisite for gender sensitive trade policy and programming. Drawing on these, robust gender and social inclusion analysis is needed as part of policy and programme appraisal or ex-ante impact assessment. This analysis should feed into programme design, implementation, monitoring and evaluation. Where evidence is not available, case studies and stakeholder consultations can provide information to help generate hypotheses about the potential distributional, gender and social inclusion impacts of trade interventions. For appraisal, Williams' (2018) SMART approach asks programmers to assess whether an intervention is Strategic, Multifunctional, Accountable, Responsive, and Transparent according to gender related criteria. This SMART approach can be adapted to the existing PF Gender and Inclusion Framework. Key Questions can also provide a guide for assessing proposed PF research project appraisal and capacity building interventions.

# 1. Background

The primary purpose of the Prosperity Fund (PF) is to support poverty reduction and inclusive growth in emerging and developing economies. The promotion of free trade and open markets is a major focus of the PF, including through the £150M Global Trade Programme (GTP), which provides support to Overseas Development Assistance (ODA) eligible middle-income countries (MICs) to enable greater investment in and interaction with global value chains that can create jobs and prosperity for women and men. The PF GTP focuses primarily on reducing key Technical Barriers to Trade (TBTs) in the areas of good regulatory practice, international standards, trade facilitation and protection of Intellectual Property Rights (IPRs) through provision of technical assistance, as well as support to research and analysis. PF GTP target countries include Brazil, Colombia, China, Indonesia, Mexico, Nigeria, South Africa, Turkey and Vietnam.

Prosperity Fund programmes are required to consider potential gender equality impacts at a minimum to ensure no harm is done and inequality is not worsened. However, the level of ambition goes beyond this: to increasing women's economic empowerment; through to transformative change to tackle the underlying barriers, gender-gaps and address unequal power relations, in line with UK government policy and international commitments. The Prosperity Fund has commissioned the Work and Opportunities for Women (WOW) Helpdesk to produce this Thematic Brief on Gender, Inclusion and Trade, to assist PF staff and delivery partners working on trade in its global, regional and country level programmes to integrate the latest evidence and best practice on gender equality, Women's Economic Empowerment (WEE) into trade programming. More specifically, the brief is intended to guide thinking on priority gender topics for the GTP's Research and Analysis fund. The thematic brief addresses three key questions:<sup>1</sup>

- 1) **What do we know** about the gender differentiated barriers, opportunities or implications of changes in NTBs such as trade regulation, standards, trade facilitation (customs) and intellectual property provisions in MICs. What are the key evidence gaps on these issues that analysis supported by trade programming can address?
- 2) **What can be learned** from existing interventions that have sought to promote more gender equitable outcomes in the above areas, that can inform Prosperity Fund trade programming?
- 3) What **approaches and methods** can Prosperity Fund staff working on trade issues use to ensure that investment decisions are appraised taking gender and inclusion into account; and that provision of technical assistance to developing countries as well as financial and management support for trade capacity, is designed taking into account the barriers outlined in Q1 and best practices identified in Q2?

## Structure of the report

Section 2 (Evidence Brief) outlines the linkages between trade, economic growth, poverty reduction and gender equality, particularly for MICs highlighting the key dimensions to consider. It identifies evidence gaps on the relationship between trade and gender, divided into the Prosperity Fund focal areas. Section 3 (Practice Brief) summarises lessons learned from existing interventions that have aimed to promote gender equitable outcomes in trade programming and outlines different tools, approaches and frameworks which can be used to ensure consideration of how specific trade-related changes may affect gender outcomes.

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<sup>1</sup> Annex A outlines the methodology for this review and its limitations.

## 2. Evidence Brief

### 2.1. Gender Dimensions of Trade-Growth-Poverty Reduction Linkages

The relationships between trade, growth, poverty reduction and development are multi-dimensional, multi-directional and involve both direct and indirect pathways (Higgins and Prowse 2010). Trade liberalisation has different effects on poor households, depending on what trade policies are liberalized and how poor women and men and households earn their living (Winters and Martuscelli 2014). There are also gender differences in how women and men experience poverty and thus how they may be affected and able to respond to trade-related economic growth (Chant et al. 2016). The relationships between growth, poverty reduction and gender equality cannot be generalised but key factors for consideration include the pattern of growth, growth strategy, the policy regime and patterns of social relations and gender inequalities (Kabeer 2015).

**Whether changes to trade contribute to gender equality or exacerbate inequalities depends on existing inequalities in the distribution of resources, access to livelihood opportunities, participation in information and knowledge sharing networks, decision-making power, and legal, social, and political rights and norms** (Fontana and Rogers 2005, Henson 2018). For instance, trade liberalisation can generate increased exports and with them new jobs and income for women and men, but this is not automatic and different people will be affected differently. Trade openness also can also increase imports which can negatively affect sectors and women's and men's employment through increased competition, in some cases, leading to whole industries closing and mass retrenchment. It is therefore important to understand which sectors are "female-intensive" in different country contexts, and to systematically analyse the social and gender differentiated impact of trade reform from a gender and social inclusion perspective (see key analytical frameworks and tools in Section 3).

Most research on gender-trade linkages has focused on the role of tariffs and employment channels and the relationship between trade openness and job opportunities for women. In some countries including MICs), trade has led to a rise in manufacturing jobs in garments and electronics (e.g. Mexico, Vietnam) and jobs in non-traditional industrial agricultural exports (e.g. South Africa, Colombia) many of which went to women (Fontana 2009). However, a recent (2018) World Trade Organisation (WTO) conference paper emphasises the heterogeneity in the effects of increased trade on the gender employment gap across regions and countries with different levels of development (Zarrilli 2017).<sup>2</sup>

Moreover, **the expansion of women's trade-related employment does not automatically imply better job quality or increased earnings and thereby reduced gender wage gaps and increased gender equality**. Occupational segregation can result in a concentration of women in certain trade sectors due to their lower bargaining power, which in turn is a driver of the gender wage gap. The literature less frequently mentions the relationship between the expansion of trade-related employment for women and women's empowerment, which is also very context specific.<sup>3</sup>

**Across many developing countries, trade has offered some gains for women, while the broader economic policy context also introduced countervailing pressures**. Kabeer (2012) highlights that earlier import-substituting, state-led industrialization strategies tended to be male-biased in many locations, but that this changed as women gained access to jobs in export-oriented sectors. However, such gains happened while quality jobs for women were reduced, which were largely in the public sector, and while states were also reducing social services related to reducing women's household responsibilities (e.g. state funded childcare programmes). MICs face trade-growth challenges related

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<sup>2</sup> [https://www.wto.org/english/tratop\\_e/womenandtrade\\_e/tradegender18\\_e.htm](https://www.wto.org/english/tratop_e/womenandtrade_e/tradegender18_e.htm)

<sup>3</sup> van Steveran et al. 2007; Rai and Waylen 2014; UNCTAD 2017.

to upgrading their economies into high-wage activities and accessing new sources of competitiveness in international trade, in an environment where donor support is gradually being withdrawn.<sup>4</sup>

**In MICs there is evidence that inequalities can deepen with trade-led achievement of middle-income status, and that significant portions of populations continue to live in poverty.**<sup>5</sup> The gender aspects of this ‘middle-income trap’ means that a country may have made progress on horizontal employment inequalities (inequalities between groups) but that vertical inequalities between individuals remain stark, as was the case in many Asian countries.<sup>6</sup> Persistent inequalities in gender outcomes related to trade require complementary social and labour market policies, to help redistribute gains and losses (see Williams 2008 for more information). Because of women’s multiple roles in economies, these complementary policies are required to maximise the positive potential impacts of trade on gender equality and women’s economic empowerment.<sup>7</sup>

Overall, the evidence on gender and trade highlights that there are many channels of change, multiple dimensions of gender inequality and complexity of outcomes. While improved access to education, finance, services and technologies all can benefit women entrepreneurs and traders, **individual interventions cannot by themselves** enhance long-term growth prospects of women-owned businesses or address the multiple aspects of gender-trade linkages.<sup>8</sup> Because of persistent discrimination which affects multiple dimensions of women’s and marginalised people’s lives, changes in the broader enabling environment including social norm changes, are also needed.

Table 1 below summarizes areas where evidence is available as well as where there are gaps in research, methods and practice. Further research gaps are outline in Annex B. Key gaps highlighted relate to : (1) gender and trade linkages broadly and (2) the PF focus areas discussed in more detail in the following sections.

*Table 1: Summary of Key Evidence Areas and Gaps*

Area	Focus of Existing Research and Evidence	Gaps in Evidence
Gender and trade	<ul style="list-style-type: none"> <li>Impact of tariff changes and trade liberalisation on women’s employment</li> <li>Impact of price changes at household level</li> <li>Sectoral and economy-wide analyses</li> </ul>	<ul style="list-style-type: none"> <li>Gender impacts of changes in import prices</li> <li>Gender impacts of tariff cuts on government spending</li> <li>Gender impact of diverse trade-related changes on women’s unpaid work</li> <li>Micro-meso-macro studies of gender-trade at sectoral and country level</li> <li>Gender impact of services liberalisation</li> <li>In-depth analysis of what does not work well and common problems faced.</li> </ul>

<sup>4</sup> Le Mare et al. 2015, Helble and Shepherd 2017.

<sup>5</sup> De Haan 2017; UNCTAD 2015. On growth more broadly see also, Berik, G. (2008). Growth with gender inequity: Another look at East Asian development. *Social justice and gender equity: rethinking development strategies and macroeconomic policies*.

<sup>6</sup> Fontana 2009.

<sup>7</sup> For more on complementary policies, see for example, Çagatay, N. (2001). *Trade, gender and poverty*. New York: UNDP; Williams, M. (2003). *Gender Mainstreaming in the Multilateral Trading System: A handbook for policy-makers and other stakeholders*. Commonwealth Secretariat; Fontana, M. (2013). Gender in economy-wide modelling. In *New frontiers in feminist political economy* (pp. 170-190). Routledge.

<sup>8</sup> de Haan 2017

Area	Focus of Existing Research and Evidence	Gaps in Evidence
<b>Trade (technical) Regulations</b>	<ul style="list-style-type: none"> <li>• Agricultural products and Sanitary and Phytosanitary Measures</li> <li>• Costs of compliance</li> <li>• Training and upgrading support</li> </ul>	<ul style="list-style-type: none"> <li>• Gender impact of other technical regulations related to a safety and quality issues besides SPS</li> <li>• Gender-sensitive methods for assessing procedural and regulatory barriers to trade</li> </ul>
<b>Standards</b>	<ul style="list-style-type: none"> <li>• Disproportionate costs of compliance on small producers, including women</li> <li>• Need to access training and upgrading support</li> <li>• Better economic position may not automatically lead to improved social position</li> </ul>	<ul style="list-style-type: none"> <li>• Constraints to women’s participation in the standard setting process</li> <li>• Best practices in gender and social accounting methodologies</li> <li>• Best practices for gender/social and economic upgrading in non-agricultural value chains</li> </ul>
<b>Trade Facilitation</b>	<ul style="list-style-type: none"> <li>• Women cross-border traders</li> <li>• Gender-sensitive integrated border management practices</li> <li>• Gendered impact of trade infrastructure (transport, employment in construction, displacement)</li> </ul>	<ul style="list-style-type: none"> <li>• The impact of border interventions in reducing gender inequalities and gender-based violence</li> <li>• The impact of information technology interventions on increasing women’s trade</li> <li>• Best practices for mainstreaming gender within National Trade Facilitation Committees</li> <li>• Gendered impact of intermediaries (e.g. customs brokers and freight forwarders.)</li> </ul>
<b>Intellectual property rights</b>	<ul style="list-style-type: none"> <li>• Women’s underrepresentation as IP rights holders</li> <li>• Gender impact of privatisation of medicines and biological material.</li> <li>• Promotion of women in STEM fields</li> </ul>	<ul style="list-style-type: none"> <li>• Gender impacts of changes to IP provisions</li> <li>• Best gender-responsive practices for inclusive IP benefit sharing</li> <li>• Policy mixes that promote both innovation and equality</li> </ul>

## 2.2 What We Know about Gender and NTBs: Evidence Gaps in the Four Practice Areas

Technical Barriers to Trade (TBTs)<sup>9</sup> are generally divided between tariff barriers and NTBs or Non-tariff measures (NTMs). NTBs include standards, sanitary and phytosanitary measures (SPS) and technical regulations (trade regulations), all of which can raise the cost and complexity involved in determining whether products or services meet a given country’s rules. Producers in MICs often struggle to apply standards, conform to trade regulations, face long trading times and challenges in enforcing IP rights. Each of these areas contain gender-specific aspects, explained more below.

Recent decades have seen a growth in research **focused on women’s roles as producers and traders and evidence on the gender-dimensions of some non-tariff measures** that relate in particular to the PF’s focus on standards, trade regulations and trade facilitation. Most research relates to:

<sup>9</sup> There is a vast array of different NTBs whose effects on trade are difficult to generalise, and the methods for assessing the impacts NTBs on trade are specific and less systemised than tariff/price simulations.

- 1) **Women's roles as producers of traded goods** in some low and middle income countries, their productive capacity constraints, opportunities for increasing competitiveness and upgrading within value chains;
- 2) **Women as cross-border traders** within low-income countries in sub-Saharan Africa and in MICs such as Nigeria and South Africa (Peberdy 2000, Peberdy and Rogerson 2000)<sup>10</sup>.

The research in area (1) highlights that non-tariff measures have grown in recent years,<sup>11</sup> especially in relation to agricultural products from developing countries, particularly sanitary and phytosanitary (SPS) measures and technical barriers to trade (TBT). Research suggests that TBTs may be especially burdensome to women, given that the sectors where they are highest are areas where women work. TBTs tend to affect Small- and Medium-sized Enterprises (SMEs) especially, where women are also concentrated. The International Trade Centre (ITC) has shown that **TBTs can be particularly burdensome for women-owned firms given the broader inequalities affecting women's access to education, training and literacy that would help them to navigate trade regulations** (ITC 2015). Related donor interventions have therefore focused on these **capacity issues, including compliance with standards and regulations**.

In contrast, for (2) **women cross-border traders, research emphasises the need to address inequalities in information and transparency around customs procedures**, informal or high payments and discriminatory behaviour at borders such as sexual harassment, exploitation and abuse (ITC 2018). These findings have led a number of donors to focus on **gender-sensitive trade facilitation interventions**, including the use of technology to reduce face-to-face interactions through single windows, electronic procedures and traders' rights-awareness raising (ITC 2018).

### 2.2.1 Trade (Technical) Regulations

Technical regulations refer to a wide range of standards and criteria that are seen as legally necessary to protect human health or safety, plant life and health, or the environment (CIDA 2003). These rules may relate to a specific product, process or production method, or mandate wider compliance, such as a law stating all product packaging must be recyclable (UNECE, 2013; UNCTAD 2003). Developing countries, including MICs, experience challenges in harmonising their trade regulations in ways that minimise costs for producers such that these kinds of technical requirements for the hygiene and safety of products have become one of the greatest barriers to trade for many producers (ITC 2010).

While technical regulations are often perceived as gender neutral, evidence has shown that the **costs of compliance with multiple technical regulations can be disproportionately high for SMEs, small producers and women** specifically (UNCTAD 2010). Technical trade regulations can most directly affect women in their roles as producers, where they may lose out because of the costs of compliance, lack of access to upgrading funds and to information (Williams 2003). As women are

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<sup>10</sup> For more evidence on gender issues in cross border trade see: Wrigley-Asante, C. (2018). Women in Ties: Informal Social Networks Among Women in Cross-Border Trading in Accra, Ghana. *Gender Issues*, 35(3), 202-219; ICTSD (2018) <https://www.ictsd.org/opinion/women-migration-and-cross-border-trade-in-africa>; Brenton, P., Bucekuderhwa, C. B., Hossein, C., Nagaki, S., & Ntagoma, J. B. (2011). Risky business: Poor women cross-border traders in the Great Lakes region of Africa. *Africa Trade Policy Note*, 11 and; Sereyath, P., Kusakabe, K., Suntornratana, U., & Sriputinibondh, N. (2008). Gendering border spaces: Impact of open border policy between Cambodia-Thailand on small-scale women fish traders. *African and Asian Studies*, 7(1), 1-17.

<sup>11</sup> See [https://unctad.org/en/PublicationsLibrary/ditctab2018d3\\_en.pdf](https://unctad.org/en/PublicationsLibrary/ditctab2018d3_en.pdf), <http://siteresources.worldbank.org/EXTPREMNET/Resources/EP128.pdf> and [https://www.wto.org/english/news\\_e/news18\\_e/trdev\\_11dec18\\_e.htm](https://www.wto.org/english/news_e/news18_e/trdev_11dec18_e.htm) The most recent WTO monitoring report shows that 137 new "trade-restrictive measures" were put in place by members during the review period, including tariffs increases, quantitative restrictions, import taxes and export duties (mid-October 2016 to mid-October 2017). At the same time, caution is needed when interpreting these figures as countries may have valid policy objectives for implementing trade policies and regulations.

disproportionately found among small-scale producers, they can also be edged out by food chain modernisation efforts (technical regulations) as in the case of the poultry and dairy industries in South Africa and West Africa, respectively.<sup>12</sup> However, technical regulations can also affect women's health and well-being as consumers, for example, if regulations are too lax and contaminated products enter the markets.<sup>13</sup> Since women often act as "risk managers" in food consumption, preparation, processing, selling and production, they may be particularly impacted by foodborne diseases. Gender analysis is thus important in designing interventions for improving food safety in informal markets in ways that support gender equality. **Most research on gender and trade regulations relates to agricultural products and Sanitary and Phytosanitary Measures (SPS)** (see Williams 2003 and Henson 2018). Donor assistance has largely focused on addressing the resource constraints faced during the compliance process, usually channelled through assistance to public standards institutions or by targeting key obstacles in global supply chains, especially in the area of SPS (Redden 2017).

**Research and policy interventions on gender and technical regulations are currently limited as this area was only recently acknowledged at the WTO. Methods for assessing procedural and regulatory barriers to trade also remain gender-blind** (UNECE 2013, WTO 2018). Governments tend to focus on a technical approach to standards, but it is important not to lose sight of the broader context for women's empowerment and the need to address underlying constraints (e.g. costs, upgrading and information) (Williams 2003). Upgrading within global value chains in response to trade-related SPS measures can offer opportunities for the economic empowerment of women. However, 'social upgrading' does not automatically follow economic upgrading reviewed in relation to the role of standards, given that key agreements promote the role of international standards in defining a country's individual regulations (Coe 2013, Smith et al. 2018).<sup>14</sup>

## 2.2.2 Standards

Standards refer to documents approved by a recognised standards' body, which sets criteria for the use, rules, guidelines and characteristics for a product or process. Unlike regulations they are voluntary rather than mandatory and may be set by a variety of organisations. Voluntary Sustainability Standards (VSS) may specify metrics such as "respect for basic human rights, worker health and safety, environmental impacts, community relations, land-use planning and others" (UNFSS 2012). VSS have proliferated over the last 20 years - the ITC has highlighted at least 247 different sustainability standards. The majority (138) include some focus on agriculture (Henson 2018). Only 40 percent of VSS address gender and social accounting methodology dimensions for assessing compliance.<sup>15</sup>

Research highlights that VSS have been associated with a range of positive impacts for at least some groups of women in global value chains, but that these impacts are context-specific, inconsistent and depend on the standard (Smith et al. 2018). Structural barriers that affect the role of standards in promoting gender equality include unequal power relations, disparities in income and resources, unequal social norms, gender-based violence and institutionalised discrimination, which undervalues women paid and unpaid work (Smith et al. 2018). This and other reviews also highlight the **gap in women's participation in the standard setting process** (e.g. IISD 2019).

Research on food safety standards **mainly focuses on smallholder participation in fresh produce value chains and food sectors** (Henson 2018). These studies emphasise that many women smallholders tend to be excluded as producers within international agricultural value chains and are often located in precarious, part-time or seasonal jobs with limited prospects for upward mobility

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<sup>12</sup> Roesel, K., & Grace, D. (2014). *Food safety and informal markets: Animal products in sub-Saharan Africa*. Routledge.

<sup>13</sup> See for example Grace, D. (2015). Food safety in low and middle income countries. *International journal of environmental research and public health*, 12(9), 10490-10507.

<sup>14</sup> [https://www.wto.org/english/thewto\\_e/whatis\\_e/tif\\_e/agrm4\\_e.htm](https://www.wto.org/english/thewto_e/whatis_e/tif_e/agrm4_e.htm)

<sup>15</sup> The Sustainability Map ([www.sustainabilitymap.org](http://www.sustainabilitymap.org)) is a public repository of information on voluntary sustainability standards, codes of conduct and international guidelines.

(Dolan 2001, Eaton and Shepherd 2001, Dolan 2004, Kabeer 2012). They may be especially vulnerable to changes induced by compliance to standards, as has been seen in the shrimp value chain in South Asia where women producers were not able to upgrade because of the cost and complexity of adhering to the new standards, and thus lost market access (Henson 2018). Involvement in food processing may provide greater benefits and more secure employment for women than in agriculture (Maertens and Swinnen 2012). With appropriate support women can play a critical role in ensuring sufficient yields and quality production, based on case studies of the gendered division of labour within cocoa value chains in Ghana and India (Barrientos 2013).

Overall, **women appear to face greater difficulties than men in accessing the resources required for complying with standards and upgrading**. Many women lack the basic literacy and numeracy skills required in the compliance process and are excluded from opportunities to develop job specific skills, often because they are segregated into activities which do not give them these opportunities (Fontana and Paciello 2010, Kaplinsky 2016, Kaplinsky and Morris 2017). Male-bias in training also means that, even when available, women may not be given the opportunity to receive standards or compliance training (Kabeer 2012). The location, design and timing of trainings do not necessarily take women's time and mobility constraints into account, due to unpaid care responsibilities or restrictive gender norms.<sup>16</sup>

### 2.2.3 Trade Facilitation

While the WTO Agreement on Trade Facilitation does not specifically consider gender, there are multiple initiatives that aim to address gender and social inclusion issues in improving customs and border management with emerging—if still limited—good practices in this area. Higgins (2012) has written one of the few **guides to gender and trade facilitation and logistics**, aimed at improving customs and border management, trade infrastructure, port efficiency, transport security, logistics and transport services, regional trade corridors and transit and multimodal transport. This and other evidence on gender and trade facilitation focuses primarily on small-scale women traders in Africa, highlighting the importance of literacy and numeracy training for informal traders, as well as of awareness raising on rights and the benefits of formalisation. However, a clear separation between 'formal' and 'informal' traders often does not exist or may be differently defined depending on what is meant by 'formal' (Higgins 2012).

Overall, the gender and trade facilitation literature highlights **the need to consider the gender and inclusion effects of new infrastructure (e.g. ports, roads) on employment and community displacement; the role of non-containerised trade for women and other small traders and; the impact of transport changes (including the development of feeder roads and public transport)**. The gendered impact of intermediaries such as customs brokers and freight forwarders requires further research, as this may raise costs but also increase efficiency (Higgins 2012). Further gaps remain at the policy level: a 2017 survey on National Trade Facilitation Committees revealed that there are gaps in women's representation and women traders within these bodies. Only 36% of members were women (out of a sample of 39 countries) and most (62%) were chaired by men (UNCTAD 2017, UNCTAD 2018).

**Improving the gender-sensitivity of border infrastructure** has involved some efforts to address gender-based violence through improved lighting and provision of sanitation, rest areas, and public safety measures. Other good practices include gender-training of customs personnel and increasing the number of women customs officials. Further research on the outcomes of these efforts is needed, drawing upon existing studies of behavioural change related to gender-based violence and violence against marginalised groups (see, for example, True and Svedberg 2019). In addition to gender-based violence and corruption, other human rights violations may occur at border controls, including

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<sup>16</sup> For example, gender norms may restrict women's mobility and participation in activities which involve socialising with unrelated men.

harassment/profiling on the basis of race, ethnicity, nationality and sexual orientation (McKay 2008, Higgins 2012). Thus, it is important to **ensure that women's rights and human rights are included within training related to integrated border management**, for both traders and officials.

#### 2.2.4 Intellectual Property Rights

Intellectual property rights have been a subject of much debate in relation to trade, development and indigenous peoples and women's rights. The WTO Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS) requires all members to apply uniform intellectual property rights and minimum standards on patents, copyrights, trademarks and trade secrets. Intellectual property (IP) protections raise numerous gender, social, legal and ethical questions from a development perspective, relating to the production of knowledge generally and the patenting of seeds, food and medicine in particular (UNCTAD 2007). IP and trade raises questions about who owns knowledge, especially traditional and indigenous knowledge or knowledge developed by marginalised groups; the ethics of patenting living organisms, and the gender and racial disparities which affect participation in science, technology, engineering and maths (STEM) fields; and industrial development and patenting (Williams 2003). The privatisation of biological materials and medicines can increase prices, particularly affecting indigenous groups, women and poorer consumers who are less able to afford increased costs (Tran-Nguyen and Zampetti 2004, UNDP 2007).

While **debate remains about the most appropriate mix of policies that promote both innovation and equality**, International Institute for Sustainable Development make the case that both ends of the spectrum are to be avoided: while lack of IP protections may discourage investment and innovation, IP provisions which are too strict also prevent innovation by raising prices, with particular impacts on women, poor and marginalised groups and developing countries. The gender implications of TRIPS relate to its provisions regarding agriculture and biodiversity, public health, traditional knowledge and technology transfer (Williams 2003, UNDP 2007). New trade and investment agreements often include IP provisions that reproduce or amend the Agreement on TRIPS.

Recently, the gender dimensions of IP have been recognised by the World Intellectual Property Organisation (WIPO), with new policy and with commitments for improving understanding of key gender issues (WIPO 2018). Recent data by WIPO show that only 30% of international patent applications included a women inventor (WIPO).<sup>17</sup> However, increasing the number of women obtaining patents is only one minimal aspect of gender-IP linkages. **Gender sensitive IP provisions should entail simple administrative processes to protect traditional knowledge and ensure that benefits are shared between women and men** (Williams 2003; UNDP 2007, Jaszi 2010, Jaszi 2015, Swanson 2015). This entails recognition of women farmers' roles, contributions and constraints in relation to the identification, maintenance and development of seeds and traditional varieties; forming a basis for valuing and protecting unwritten knowledge; provisions to ensure women have access to seeds, credit, technology and research results; efforts to improve women's access to research and development activities; licensing for essential food inputs and food security; rejection of the patenting of plant varieties, animal breed or other essentially biological processes and; rejection of UPOV 1991 as the model for *sui generis* systems (Williams 2003: 145).

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<sup>17</sup> <https://www.wipo.int/women-and-ip/en/>

### 3. Practice Brief: Learning from Existing Interventions and Tools for Good Practice

A pre-requisite to gender sensitive design of trade-related research or programmes is to understand the gender, inclusion and trade linkages and the potential mechanisms whereby trade reforms and interventions can impact on gender inequalities, either positively or negatively. **Overall best practice is to undertake robust, detailed and context-specific gender and social analysis as part of the appraisal or ex-ante impact assessment<sup>18</sup>.** This can inform policy and programme design, implementation, monitoring and evaluation. Where this is not possible or the required evidence is not available, analysis of case studies and stakeholder engagement can provide information to help generate hypotheses about the potential distributional and gender impacts of trade interventions.

#### 3.1. Approaches to analysing gendered impacts of trade interventions

A number of frameworks can inform understanding of how specific trade-related changes may shape gender equality and opportunities for more inclusive growth, including the World Bank’s (2007) Six Transmission Channels, Fontana and Roger’s Macro-Meso-Micro Linkages (2005) and UNCTAD’s Toolbox (2017).<sup>19</sup> These tools offer complementary approaches to obtaining a **gendered picture of the broader economy which is the first step to understanding gender-trade changes** and possible intervention strategies.

- **World Bank (2007)** helps to understand the ways in which gender and trade interact and the potential impact of trade policies through examining six key transmission channels from a gender and inclusion perspective: **Employment/wages; Prices; Access to goods and services; Assets and resources; Transfers and taxes; and Authority & decision-making power.**
- **Fontana and Roger’s (2005)** highlights relevant issues in the economy (macro), in institutions (meso) and at the individual and household level (micro) that can assist in identifying how gender and trade interact. Table 2 below provides a summary overview.

Table 2: Overview of Gender-Trade Macro-Meso-Micro Framework

Level	Macro-level (economy-wide)	Meso-level (institutional)	Micro-level (household, individual)
Key Issue	The gendered structure of the economy. Gender divisions of labour between the different productive market sectors and the reproductive/unpaid (care) sectors.	Institutions that help structure the distribution of resources and activities at the micro-level, e.g. gender biases in the rules of operation of labour and other markets.	Gender divisions of labour, resources and decision-making within households.

<sup>18</sup> Annex F contains key questions to inform research or programme appraisal/ design in the areas of trade facilitation, standards and intellectual property rights.

<sup>19</sup> <https://unctad.org/en/pages/PublicationWebflyer.aspx?publicationid=1877>;

[https://siteresources.worldbank.org/EXTTOPPSISOU/Resources/1424002-1185304794278/TIPs\\_Sourcebook\\_English.pdf](https://siteresources.worldbank.org/EXTTOPPSISOU/Resources/1424002-1185304794278/TIPs_Sourcebook_English.pdf);

<https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1467-7679.2005.00290.x>

Level	Macro-level (economy-wide)	Meso-level (institutional)	Micro-level (household, individual)
Examples of Change	If women-intensive sectors expand, gender gaps in market participation narrow.	Less government revenue might lead to reduction in public provision of social services, which affect women as service users.	Trade can destroy or create sources of independent income for women.

Source: Adapted from Fontana and Rogers (2005)

Once a gendered picture of the economy has been obtained, an impact assessment should be undertaken of the trade-related changes expected. Where possible, economy-wide modelling should map the gender composition of sectors of the economy including goods and services, public services and consumer impacts, the impact on informal and women's unpaid work, and the effects through taxes and women's welfare regimes (Fontana 2016). A gender and social lens should be systematically applied to policy analysis with the review of the six key transmission channels for trade reform, bringing together social, political and institutional analysis (World Bank 2007).

The UNCTAD: Trade and Gender Toolbox and the World Bank Source Book: Tools for Institutional Political and Social Analysis of Policy Reform can be used in ex-ante assessment of the impact of trade reforms on women and gender inequalities. The UNCTAD methodology is applied to a specific trade agreement and can be used to assess the gender impacts of trade agreements or reforms.

UNCTAD has undertaken integrated analyses of multiple gender-trade linkages such as the economy-wide analysis of Uruguay, a high-middle income country (UNCTAD 2015). This study found that **'trade-led economic and employment growth is not sufficient in itself to overcome gender gaps. Specific policy measures are required** to reduce women's segmentation in particular sectors of the economy and increase their access to more qualified positions in the services sector', which has been the main traded area of the economy (UNCTAD 2015).

In analysing both the opportunities for and potential barriers to gender equal or inclusive gains from trade it is important to:

- **Consider both the gender-specific or gender-intensified constraints that women experience in relation to trading opportunities.** A 'gender-specific' constraint is faced particularly by women, whereas a 'gender intensified' constraint, affects both women and men, but its impact on women is greater due to pre-existing conditions of gender inequality (UNCTAD 2017: 21-22). For example, women exporters face both heightened business-related challenges (e.g. limited access to export licenses because of lower literary or access to information) and gender-related obstacles (such as sexual harassment at borders) (see Frohman 2017).
- **Recognise women's multiple and specific roles within the economy and supply chains and how these are affected differently by trade changes.** Women also balance these roles with unpaid household responsibilities, which means they are time poor and have mobility constraints, reducing their capacity to respond to such changes:
  1. **Workers:** trade may shift the quantity and quality of jobs for women, the gender composition of the labour force and working conditions, earnings and labour market segmentation.
  2. **Producers/traders:** gendered constraints on the access and use of productive resources limits women's ability to respond to trade opportunities. Women producers may face competition from cheaper imported products or obtain higher incomes if input prices fall or if they are better able to export. It also depends on whether they are net producers or consumers of goods and services.

3. **Consumers:** Changes in prices of food, household items and services especially have a gendered impact. Women and girls' welfare may increase if cheaper goods are those that they consume but may be reduced if privatisation of basic services leads to new fees and higher costs.
4. **Taxpayers:** women and citizens on low incomes may be hard hit by new taxes used to compensate for revenue loss as a result of tariff cuts, by the removal of subsidies from key inputs such as fuel or transport, or by loss of social welfare or protection measures.
5. **Unpaid workers:** Changes to all of the areas above may have implications for women's time, unpaid work and the distribution of this work within households and society at large (government programs) (see Annex C for a detailed summary of Gender-Trade Changes Based on Women's Roles in the Economy).

### 3.2. Mainstreaming gender in the design of trade policies and programmes.

The **SMART Checklist for Trade and Gender Programming** (Williams 2018) is a useful general tool for programme managers to assess whether an intervention is Strategic, Multifunctional, Accountable, Responsive, and Transparent from a gender perspective. The checklist emphasizes the need to:

1. Align trade policies with national development and gender equality policies [Strategic];
2. Address trade as part of a balanced policy mix [Multifunctional];
3. Increase women's participation in policymaking [Accountable];
4. Ensure trade policies and programmes respond to women's priorities and needs [Responsive];
5. Clearly communicate policies and changes [Transparent].

Annex D maps this checklist against the PF's G&I framework – in terms of different levels of ambition from minimum standards (“do no harm”), to women's empowerment and social transformation toward greater gender equality and inclusion.

Table 3 below summarises more specific good practices and tools in the different areas relevant to PF programming, with examples of their applications, which are then explained in more detail in the following sections. Annex E also summarises some key questions relevant for appraising initiatives in the key focal areas (standards and technical regulations, trade facilitation and intellectual property).

*Table 3: Selected Good Practices, Tools and Approaches in Gender and Trade*

Area	Good Practices	Tools	Projects/Applications
Trade Policy	Obtaining a gendered picture of the economy; modelling the social impact of trade (impact assessment); holistic design to trade policies, including needs assessment and consultation mechanisms; ensuring women's involvement in trade negotiation to maximise women's gain from trade.	World Bank 2007; Macro-Meso-Micro (Fontana 2009); UNCTAD: Trade and Gender Toolbox (2017).	The APEC Policy Partnership on Women and the Economy (APEC 2018), which addresses gender issues in traded sectors, as well as broader enabling environment considerations. See also: APEC (2017) Gender Inclusion Guidelines; Advancing Inclusion through Enhancing Women and Girls' Digital Literacy and Skills in the Context of Industry 4.0 (Vietnam); Women as Prime Movers of Inclusive Business (Philippines) and Public-Private Strategies to Reduce the Costs of Gender Based Violence in APEC Economies (Peru).

Area	Good Practices	Tools	Projects/Applications
<b>Standards and Technical Regulations</b>	Enhancing the gender equity impact of trade-related capacity building on standards and technical regulations.	The STDF Market Access 11 (P-IMA11) framework.	STDF's work on SPS; UNIDO-Norad Trade Capacity Building programme in Zambia on National Quality Infrastructure; ITC's work on women entrepreneurs; ISO Clean cookstoves ( <a href="#">ISO 19867-1</a> ).
<b>Trade Facilitation</b>	Gender-responsive integrated border management and trade infrastructure, including by ensuring representation of women's organisations/associations on national trade facilitation committees (NTFCs) and border committees.	The Gender Equality Organizational Assessment Tool (GEOAT). This tool includes recommendations for Customs on how to improve border operations and engagement with women stakeholders <sup>20</sup> .	World Bank Great Lakes Region Trade Facilitation Project; TMEA's Women and Trade programme, Gender Mainstreaming at Mombasa Port, Kenya.
<b>Intellectual Property</b>	Addressing women's underrepresentation in intellectual property-intensive fields.	SIDA Genetic Resources and Intellectual Property (GRIP) curricula.	SIDA GRIP Training Programme, including a poverty, human rights and gender perspectives in its work.

### 3.2.1 Standards and Technical Regulation: Enhancing gender equity impact and capacity building.

Best practice highlights the need to **promote women's employment within national regulations and standards setting bodies, as well as address producers' concerns and ability to comply**, including the costs of compliance for small businesses. Most best practices refer to agricultural value chains and voluntary sustainability standards. The Standards and Trade Development Facility (STDF) has been active on gender-sensitive SPS capacity building but less has been done to understand other areas of standards and technical regulations, such as animal health (STDF 2015).

United Nations Industrial Development Organisation (UNIDO), as part of a Norad-funded Trade Capacity Building programme in Zambia, has tackled barriers to women's employment in standards and technical regulations' professions and relevant national bodies (e.g. weights and measures, metrology) (UNIDO 2016). The project undertook a simple diagnostic of these barriers, helped the government of Zambia to design a Gender Action Plan and supported a capacity building programme aimed at creating a more supportive environment for women's participation. As part of this work, the project helped local quality authorities recognise the gender gaps in national quality bodies, support the recruitment of women, as well as engage more effectively with women stakeholders.

<sup>20</sup> [http://www.wcoomd.org/~media/wco/public/global/pdf/media/newsroom/press/gender-equality-assessment-tool-\\_final.pdf?la=en](http://www.wcoomd.org/~media/wco/public/global/pdf/media/newsroom/press/gender-equality-assessment-tool-_final.pdf?la=en)

ITC's Women and Trade Programme and She Trades platform have also been working to build the capacity of trade support institutions to support business women as well as women entrepreneurs more broadly, including on compliance issues. In another area, STDF's Prioritising SPS Investments for Market Access 11 (P-IMA11) framework supports better decision-making in developing countries on how to choose between competing investments to build SPS capacity and boost agri-food exports. Countries can use P-IMA to work with public and private sector stakeholders to discuss SPS investment needs, apply decision criteria to prioritize investments and support SPS planning and resource allocation. By using social impact criteria focusing on vulnerable groups, in particular women, when looking at products and export markets, the tool helps to make sure that any impact on women is embedded in the discussion and decision-making process. Including evidence of the impact on women involved in agri-food products and exports can highlight the value of investing in SPS capacity building, improve SPS planning and decision-making and mobilize funds for SPS projects (STDF 2015).

In this area, emerging consensus is around working with national standards' bodies to identify NTBs that raise gender issues. A promising practice is in-depth **training and mentorship for women traders combined with measures addressing the broader business environment and macro-level constraints**, including access to mobile phones and other technologies and gender norms on 'appropriate occupations' (De Haan 2017).

### **3.2.2 Trade Facilitation: Gender-responsive integrated border management and trade infrastructure.**

Best practices in trade facilitation have focused on **gender-responsive border management and on minimising the negative impact of new trade infrastructure**. A number of World Bank and other donor funded projects have addressed these issues in sub-Saharan Africa such as the Great Lakes Region Trade Facilitation Project (GLRTP) and TMEA's Women and Trade programme.<sup>21</sup> What does not work well and problems faced also require further in-depth analysis.<sup>22</sup>

The GLRTP has worked with cross-border traders and integrated gender-sensitive border infrastructure and measures to prevent and mitigate the risk of gender-based violence (GBV) against traders. Projects such as the GLRTP have highlighted the need for: gender training for customs officials on women's rights and human rights; gender sensitive policies (e.g. codes of conduct and policies on sexual harassment and discrimination); that ministry and frontline staff better reflect the demographics of traders and surrounding society (in terms of sex, ethnicity, religion, language, etc.), including in senior positions; the involvement of women's organisations within border committees and within stakeholders consultations and; gender-disaggregated data collection at borders (which is also an issue in other regions). The **Gender Equality Organizational Assessment Tool (GEOAT)** includes recommendations on how to improve border operations and engagement with women stakeholders.<sup>23</sup> Questions from this tool can be found in Annex F.

While many of these practices are related to borders in Africa, they are also relevant for work in other geographical areas with significant cross-border trade, whether or not this is predominantly undertaken by women. Mainstreaming gender issues within trade infrastructure and ensuring safeguards in new projects is also a key and emerging practice relevant to MICs, as exemplified by TMEA's work at Mombasa Port (TMEA 2017).

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<sup>21</sup> <http://projects.worldbank.org/P151083?lang=en> and <https://www.trademarka.com/womenintrade/>

<sup>22</sup> UNCTAD have analysed some of the key problems facing gender and trade interventions here [https://unctad.org/en/PublicationsLibrary/ditc2014d3\\_en.pdf](https://unctad.org/en/PublicationsLibrary/ditc2014d3_en.pdf).

<sup>23</sup> <http://www.wcoomd.org/~media/wco/public/global/pdf/media/newsroom/press/gender-equality-assessment-tool-final.pdf?la=en>

### 3.2.3 Intellectual Property Rights: Addressing women's underrepresentation

Best practices have focused on addressing women's underrepresentation in intellectual property-intensive fields. These highlight a need for formal legislation and mandated quotas; techniques to increase fairness; organisational cultural change; and professional development to increase women's employment in STEM fields which are IP-intensive (Swanson 2016, Coe 2019). Other good practice highlights the need to ensure compulsory licensing to produce basic medicines (although this may not help countries without production capacity); utilising provisions which prevent patenting of biological materials which impose user fees, especially where plants or seeds are used by indigenous groups and poor women and men.

In developing countries, the protection of traditional and indigenous knowledge, which women may have principally developed or safeguarded, is an important area of donor intervention (Gearhart-Sema 2009). A Swedish International Development Agency (SIDA) evaluation highlights the need to consider gender in IP-related capacity building by undertaking training in a gender-aware manner, and by **identifying the gender equality aspects in relation to intellectual property** (Ljungman et al. 2015). SIDA's Genetic Resources and Intellectual Property (GRIP) International Training Programme, operated with UNDP and WIPO, includes poverty, human rights and gender perspectives in its work. This training programme emphasises the need to develop a holistic approach to IP, including both copyright and industrial property, and includes a specific module on gender equality.

Efforts are needed to **increase women's representation within STEM occupational fields** (Swanson 2016); ensure compulsory licensing to produce basic medicines (for countries with production capacity); utilise provisions which prevent patenting of biological materials that impose user fees, especially where plants or seeds are used by indigenous groups and poor women and men.

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## Annex A: Methodology and limitations

The brief draws on existing frameworks, tools and approaches for understanding potential trade, gender, inclusion and poverty linkages, as well as existing empirical research and programme evidence. It is based on a review of known literature, new Google Scholar searches and searches of relevant journals (e.g. Feminist Economics, Development and Change) on the specific brief topics as well as online searches for evaluations (e.g. 3ie) and donor initiatives (e.g. DevTracker). Programme-related information has been drawn from previous work and evaluations (e.g. WOW Helpdesk Query on Gender Mainstreaming in Trade Mark East Africa (TMEA), gender and social advisory work at the UK TAF2+ Fund). The search focused on the broader gender, trade and development literature and includes evidence from PF MICs where this was relevant and available. Even though the focus is predominantly on gender, wider inclusion issues are also highlighted.

There are some limitations to this brief. The academic and donor literature on gender-trade linkages relates mainly to low-income countries, and to those MICs where the growth in trade-related employment has been female-intensive (e.g. manufacturing in Mexico, electronics in Vietnam) and/or where there have been focused efforts on collecting gender-disaggregated employment data (e.g. Brazil, Argentina, Indonesia). Whilst gender-trade linkages are relevant at all national income levels because they relate to women's and men's roles within economies, the role of the sectoral composition of economies, for example, represents an important difference between low and middle-income countries. For instance, women in middle-income countries are less likely to be employed in agriculture than women in low-income countries. This is relevant to the brief because, for example, the gender and trade related evidence on standards comes mainly from low-income contexts where agriculture is a larger share of the economy. In another example, with regard to the trade facilitation literature, the gender related literature is focused on women informal cross-border traders in Africa, rather than say, occupational segregation within the field of trade logistics, which may be more relevant to MICs.

As one of the main development issues within MICs relates to the persistence of poverty and the deepening of inequality – in incomes and wages but also understood in broader terms - it may be that literature from high-income countries is of greater relevance in some areas. This review has not drawn extensively on literature from high-income countries, but some challenges in MICs reflect similar issues in high-income countries (e.g. gender and racial disparities in IP and STEM fields). The geographic relevance of these different issues is outlined as they arise in the brief.

## Annex B: Data Availability and Gaps

Data	Gender Aware Trade Frameworks	Women as workers	Women as producers /traders	Women as consumers	Women as Unpaid workers
<b>Available</b>	<ul style="list-style-type: none"> <li>- Gender equality elasticities (van Staveren, 2007, UNCTAD )</li> <li>- social accounting matrices (Bussolo and de Hoyos, 2009 )</li> <li>-general equilibrium models with gender variables (Fontana 2004; Azar et al., 2007) <sup>24</sup></li> <li>-gender audits, ex ante and ex post assessments of trade agreements that include gender variables (Bandeled 2016, GIZ, 2014)</li> </ul>	<ul style="list-style-type: none"> <li>-Firm- or individual-level data on labour market outcomes combined with:</li> <li>- Firm- or sector-level data on trade measures</li> <li>- case studies</li> </ul>	<ul style="list-style-type: none"> <li>-Household- or firm-level data on farmer/producer characteristics and economic outcomes combined with: - Firm- or sector-level data on trade measures</li> <li>- case studies</li> </ul>	<ul style="list-style-type: none"> <li>- individual and Household-level data on the share of different goods and services in total household consumption, the gender of the household head combined with:</li> <li>- Price data on traded goods and services</li> <li>- case studies</li> </ul>	<ul style="list-style-type: none"> <li>-individual and Household time-use-surveys</li> <li>- case studies</li> </ul>
<b>Needed</b>	<ol style="list-style-type: none"> <li>1. Gender value chain analysis for key export sectors to develop specific accompanying measures - Monitoring indicators on trade-focused measures of gender equality</li> <li>2. GTAP CGE model: - estimated impact on production, export/import volumes and prices by sector &amp; female ownership of exporting firms by sector, top consumption goods by gender (UNCTAD)</li> </ol> <ul style="list-style-type: none"> <li>- comparable international data on women's export entrepreneurship</li> </ul> <p>Gender Applications of Existing Trade Databases</p> <ul style="list-style-type: none"> <li>- WITS databased can be analysed for NTMs affecting products women are likely to produce</li> <li>- ITC SME competitiveness outlook</li> </ul>	<p>Linked employee-employer survey that contains:</p> <ul style="list-style-type: none"> <li>- detailed trade statistics at a high level of disaggregation by employers and</li> <li>- detailed data on work characteristics by employees</li> <li>- Lack of enough reliable and comparable data on the informal sectors, which provide income to many people in countries in the Global South (ILO and WIEGO)</li> </ul>	<p>Household or enterprise surveys that collect:</p> <ul style="list-style-type: none"> <li>- detailed data on trade made by farmers/firms and</li> <li>- detailed statistics on supply-side constraints (based on both quantitative and qualitative data) and economic outcomes of farmers/firms.</li> </ul>	<p>Household surveys that collect:</p> <ul style="list-style-type: none"> <li>- detailed information on goods and services (including public services) consumed by women themselves and by household members.</li> </ul>	<p>Comparable Intra-Household Time Use Surveys to measure the time individuals in a household spent on specific tasks. - case studies or small-scale qualitative research</p>

<sup>24</sup> UNCTAD are also planning to develop a Gender and Trade index and a “Global gendered CGE model: to disaggregate all activities by gender and introduce unpaid work and intra-household allocation in the modelling framework”. It is not clear if they are drawing on the existing frameworks in this area.

# Annex C: Gender-Trade Changes Based on Women's Roles in the Economy

Women's Economic Roles	Channels and theories of change	Possible Effects
<p><b>1. Workers</b></p> <p>Trade leads to some sectors expanding and some other sectors contracting. It is important to know if the expanding/contracting sectors are women-intensive. In order to assess changes, it is thus important to know the gender composition of the labour force and to know about working conditions, earnings and labour market segmentation. Trade may affect both job quantity and quality.</p>	<p>(1a) Standard theory (HOSS): prices of low skilled goods in developing countries rise as a result of trade.</p> <p>(1b) Standard theory (Becker): international competition makes it costly to hire men when it is cheaper to employ women.</p> <p>(2) Heterodox theory: the competition drives firms to use existing inequality to reduce unit costs.</p>	<p>Employment and Wages</p> <p>(1a) Demand for female labour rises as women are considered low skilled. Demand for male labour rises as they are considered more highly skilled. Women's wages rise, men's wages fall and the gender wage gap decreases.</p> <p>(1b) Demand for female labour rises due to competition demand for male labour. It is relatively more costly to hire men. Women's wages rise, men's wages fall, and the gender wage gap decreases.</p> <p>(2) demand for cheaper female labour arises due to gender wage gap. Women's wages may or may not rise depending on labour supply. The gender wage gap may increase or decrease.</p>
<p><b>2. Producers and Traders</b></p> <p>Access and control over resources such as land, credit and inputs shapes whether people can take up new trading opportunities. Gender intensified constraints on the use of productive resources limits women's ability to respond to economic opportunities and generally weakens output growth.</p>	<p>(1) Increase competition from imported products.</p> <p>(2) Lower import prices as a result of tariff cuts.</p> <p>(3) Higher prices for export goods.</p>	<p>Livelihoods</p> <p>Lower income for women producers who face competition from cheaper imported products (Unless they produce for own consumption).</p> <p>Low income for women who are petty traders of locally produced goods due to higher competition; higher income for trading cheaper imported goods on the domestic market.</p> <p>Higher income for women producers and traders if they are able to export.</p>
<p><b>3. Consumers</b></p> <p>Trade leads to some goods becoming cheaper relative to other goods. Different groups differently affected because of different consumption patterns. Changes in prices of food and household items especially affect women in their role as home managers.</p>	<p>Lower import prices of consumption good as a result of tariff cuts.</p> <p>Higher prices of basic services as a result of trade in services liberalisation.</p> <p>Lower government spending (social expenditure) as a result of tariff cuts.</p>	<p>Welfare</p> <p>Increase in poor and women-headed households' welfare if cheaper goods are those they consume.</p> <p>Reduction in women's access to basic services due to higher prices.</p> <p>Public services</p> <p>Reduction in the supply of public and social services. Women are often the main users of social services and often employed in the public sector.</p>

<p><b>4. Taxpayers</b></p> <p><b>Regressive tax structures mean that women and low-income people may be hit especially hard by new taxes.</b></p>	<p>Governments raise taxes to compensate for loss and revenues as a result of tariff cuts.</p>	<p>Income and Employment</p> <p>(1) Higher direct and indirect tax incidence.</p> <p>(2) Women fall out of and/or are discouraged from entering the labour market.</p>
<p><b>5. Unpaid Workers</b></p> <p><b>Women's disproportionate responsibility for unpaid work in the household limits their ability to take up paid work and full-time employment.</b></p>	<p>Women may experience time poverty or 'triple burden' which limits their labour market activities. Unpaid work plays a key supporting role in enabling the economy but is not traditionally recognised as 'economic.'</p>	<p>Welfare and Labour Force Participation</p> <p>Changes to all of the other areas above – employment, social expenditure, production of goods for own consumption etc. – may have implications for women's time, unpaid work and the distribution of this work within households and within society at large (government programs).</p>

Source: Adapted from UNCTAD 2017: 53-54.

## Annex D: A SMART Checklist for Trade & Gender Programming (Williams 2018)

Prosperity Fund G&I Framework Objective	Prosperity Fund Intervention	Applications in Focus areas (from P Gender & Inclusion Framework)	SMART Guide
<b>Minimum Standards: Do no harm and do not exacerbate gender inequalities within national economies due to changes in the pattern of trade.</b>	Trade Programmes that address due diligence, risks, practical needs and vulnerabilities of women and marginalised groups.	<ul style="list-style-type: none"> <li>- assessment of intervention impacts (benefits &amp; losses) on women &amp; men, including whether gender-related risks have been identified, along with risk mitigation measures.</li> <li>- stakeholder consultation</li> <li>-Identifies risks &amp; unintended negative consequences to avoid, mitigate &amp; monitor</li> </ul>	<p>Accountable (responds to trade stakeholder needs)</p> <p>+</p> <p>Transparent (clear process for policymaking is communicated)(AT)</p>
<b>Empowerment: widen opportunities for women and men to participate equally in the economy.</b>	Trade Programmes that build assets, capabilities and opportunities for women and marginalised groups.	<ul style="list-style-type: none"> <li>-Recognise and take women’s care and household responsibilities into account as a major constraint to women’s economic participation</li> <li>- increase women’s productive employment opportunities;</li> <li>- improve size/ profitability of women-owned enterprises</li> <li>-increase access &amp; control over economic assets</li> <li>-increase women’s individual agency &amp; decision-making power with choices, knowledge &amp; info</li> <li>-Women and excluded groups are active participants in design &amp; implementation of programme; with regular beneficiary feedback</li> <li>-Supported by gender mainstreaming with institutional change</li> </ul>	<p>Accountable, Transparent</p> <p>+</p> <p>Responsive (to defined women’s rights, needs and empowerment priorities)</p> <p>+</p> <p>Strategic (linked to national development plans). (STAR)</p>
<b>Transformative: working toward sustainable, more inclusive economies and export development and transform existing patterns of inequalities.</b>	Trade Programmes that address unequal power relations and seek systemic institutional and societal changes.	<ul style="list-style-type: none"> <li>-Programme challenges social norms around women’s econ participation &amp; ability to access resources &amp; employment</li> <li>-Recognise, redistribute &amp; reduce household &amp; caring responsibilities/ unpaid labour</li> <li>-Programme amplifies women’s collective voice &amp; action around economic empowerment &amp; rights e.g. provide support/ training to build &amp; grow orgs to collectively bargain for improved public services</li> <li>-Supports protective legal &amp; policy frameworkssocial norm change</li> <li>- Accountability mechanisms</li> </ul>	<p>Accountable, Transparent,</p> <p>Responsive, Strategic,</p> <p>+</p> <p>Multifunctional (trade policies combined with social policies) (SMART)</p>

# Annex E: Key questions for the Prosperity Fund focus areas

The following questions can be used to inform research and programme design:

## 1. Key Questions in Standards and Technical Regulations

- How effective is the existing regulation or standard at integrating gender considerations in its standard certification criteria?
- What are the gender outcomes from applying the regulation or standard design through specific activities and interventions by certifying bodies, producers as individuals and groups, and the organizations that work with and assist them? What are the risks and mitigation measures for these?
- How are women/men involved in particular value chains of relevance to the project? For example, as producers, farmers, traders, workers in food business operations.
- What constraints do they face and how could they be addressed to take advantage of new opportunities? How are women/men expected to benefit from the project?

## 2. Key Questions in Trade Facilitation

- Have customs and border management personnel, as well as National Trade Facilitation Committees, received accurate information and adequate and appropriate training on gender issues?
- Are border personnel adequately prepared to uphold women's and human rights?
- Are gender-responsive policies in place, such as codes of conduct and policies on sexual harassment and discrimination?
- Are employment opportunities generated through new infrastructure gender-balanced? (e.g. construction). Have the gender-related risks and risk mitigation measures been taken into account?
- Do border personnel reflect the society in terms of sex, ethnicity, religion, language, etc.?
- Are women and men equally employed at all levels of customs and border management institutions?
- Are key stakeholders from government ministries and civil society, including women's organisations, involved in assessment, planning, decision-making, and monitoring and evaluation processes for border management?
- Have customs procedures and processes been reviewed from a gender perspective?
- Have centralised registers for information gathering and exchange been created at border crossings? Is all data disaggregated by sex, age, and other relevant factors?

## 3. Key Questions in Intellectual Property Rights

- What are the mechanisms for recognizing, protecting and rewarding men's and women's knowledge, innovation and practices?
- Are systematic processes established that identify women's contribution to this body of knowledge?
- Are there accessible mechanisms in place for capacity-building and awareness-raising/training for women to understand and access the IPR system?

# Annex F: Gender and Social Assessment questions

## Gender and Social Assessment Questions

1. **What is the gendered picture of the economy and likely impacts?** Economy-wide **modelling** should map the gender composition of sectors of the economy including goods and services, public services and consumer impacts, the impact on informal and unpaid work, and the effects through taxes and women's welfare regimes.<sup>25</sup>
2. Does this picture include an **intersected, distributional analysis** across a variety of groups, workers and households, intersecting groups of women, by income quintile, ethnicity, rural/urban, disability, age etc. This will involve focusing on different groups of women and not only women exporters.
3. Have **gender-disaggregated statistics** been used consistently throughout? Have they compared numbers for both men and women, where available?
4. **What relevant gender-sensitive ex-ante and ex-post impact assessments exist for this relevant context and intervention?** What disaggregated data and/or case studies are available?
5. **Have gender-sensitive indicators been included that track the multiple impacts on women?** These would include impacts on women as consumers, workers, trader, public service users and unpaid workers and aim to assess the impact on women's human rights, capabilities and vulnerabilities, such as violence against women, precarious working conditions and a possible increasing work burden on women.
6. **How are poor, marginalised and women stakeholders being meaningfully engaged and how is the information they provide used and fed back?**

Source: adapted from Fontana (2016) and Amos (2018)

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<sup>25</sup> Fontana 2016: 36-37.