



**Asia-Pacific
Economic Cooperation**

**Gender Analysis, Concepts and Practice
Training Manual**

**For Gender Focal Point Network Workshop
Arequipa, Peru**

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APEC Workshop on Gender Analysis Training

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The Asia Pacific Women’s Information Network Center (APWINC), an educational and research institute at Sookmyung Women’s University coordinates the workshop in close cooperation with the GFPN and the APEC Secretariat.

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PROGRAM: APEC GENDER ANALYSIS TRAINING WORKSHOP

AREQUIPA, PERU - May 15-16, 2008

Day One

May 15	Program	Activity Type	Time
9:00-10:30	<i>Introductions and Context of the Workshop</i>		
	Official Welcome	APWINC - NEA GFPN Peru APEC Secretariat	30 minutes
	Introductions, Objectives and Design of the Workshop	APWINC	
	Opening Exercise; Appointment of Eye and Ear	Dana Peebles & Lisa Fancott	
	Gender Concepts and Gender Analysis Frameworks		
	What is Gender and Gender Analysis (Intro presentation)	Presentation	30 minutes
	Basic Gender Analysis Exercise – Values Tree	Small Group Exercise	45 minutes
10:30 – 10:45	Break		15 minutes
10:45 – 11:15	Empowerment Framework	Presentation	30 minutes
11:15 – 11:55	Empowerment Framework Case Study Analysis (to be developed using trade or budget related case)	Small Group Exercise	40 minutes
11:55 – 12:15	Debriefing of Empowerment Framework Case Study Exercise	Large group discussion	20 minutes
12:15 – 13:30	Lunch Break		1 hour, 15 minutes
13:30	Gender Analysis Frameworks Continued		
13:30 – 13:45	The Chocolate Challenge (Equity and Equality)	Interactive large group exercise	15 minutes
13:45 – 15:00	Women and Trade Issues in APEC Presentation and Discussion	Guest Speaker: Heather Gibb	1 15 minutes
15:00 - 15:15	BREAK		15 minutes
15:15 – 16:30	Gender and Trade: Tools to	Presentation and Exercise	1 hour, 15 minutes
16:30 – 16:45	Framework for the Integration of Women in APEC	Presentation	15 minutes
16:45 - 17:00 –	Clear and Muddy Feedback Exercise Report back from the Eye and Ear	Summary	15 minutes
17:00	FINISH		

Day Two

16 May	Program	Activity Type	Time
9.00-12:00			
9:00 – 9:15	Gender Concentration/Review Appointment of Eye and Ear	Review Game	15 minutes
9:15 -9:35	Practical Needs & Strategic Interests	Presentation and Large Group Exercise	20 minutes
9:35 – 10:00	APEC and other Gender Analysis Frameworks	Presentation & Discussion	25 minutes
10:00 - 10:30	Comparison of Gender Analysis Frameworks Exercise	Small Group Work	30 minutes
10:30 – 10:45	BREAK		15 minutes
10:45 – 11:15	Debriefing of Gender Analysis Frameworks Exercise	Large group discussion	30 minutes
11:15 – 12:00	Gender and Trade Policy Framework	Presentation & Large group discussion	45 minutes
12:00 – 13:15	LUNCH		1 hour, 15 minutes
	Gender Responsive Budgets		
13:15 – 14:00	Gender responsive budgets	Presentation and discussion	45 minutes
14:00 - 14:30	Gender-Responsive Budgets Case Study	Presentation	30 minutes
14:30 – 15:00	Advocacy Strategies and Action Points for Gender Budget Processes	Presentation & Brainstorming Exercise	30 minutes
15:00 - 15:15	BREAK		
15:15 – 15:45	Summary Report from Eye and Ear Evaluation		30 minutes
15.45 - 16.00	Closing Ceremony		15 minutes

Gender Analysis, Concepts and Practice

Training Manual

Program – Day Two, May 16, 2008

Workshop Objectives:

1. To familiarize participants with basic gender concepts and gender analysis tools.
2. To introduce participants to trade-related gender analysis tools.
3. To introduce participants to gender-based budget processes and issues.

Presentation: What is Gender and Gender Analysis?

(refer to powerpoint presentation section of manual)

Exercise: Values Tree - Gender Values, Attitudes & Practices

The exercise:

- Illustrates deep-rooted values and attitudes about gender and institutions or systems that perpetuate these values.
- Highlights the systemic nature of gender inequality.
- Points out that working towards gender equality may necessitate working at different levels in order to impact upon systemic or structural inequality.

KEY MESSAGES:

The key is to analyze how societies perpetuate values, attitudes and practices leading to gender discrimination, and to identify ways in which you can effectively support gender equality.

This analytical framework is also the first gender analysis tool to be introduced in this workshop and is a basic tool you can use with your colleagues in diverse settings.

INSTRUCTIONS:

Divide into small groups of approximately 5 to 6 people. The facilitator will give each group an issues statement representing either a value or practice. Your group is to draw a values and attitudes tree based on your issue which includes the following elements:

Roots: Values and attitudes concerning gender.

Trunk /Branches: Institutions that perpetuate values and attitudes about gender.

Leaves: Practices observed in society reflecting values and attitudes concerning gender perpetuated by institutions and systems.

Please note:

- Gender values and attitudes refer to those systemic features in society that enforce gender equality or inequality.
- Gender practices refer to the results of gender values and attitudes, and institutions that perpetuate these practices.

Participant Activity Work Sheet

Draw a tree with roots, a trunk, branches and leaves.

As a group, decide where to put the issue you have been given on the tree. Fill in the rest of the tree for your issue.

Remember:

Roots = Gender Values and Attitudes

Trunk/Branches = Institutions which perpetuate those values and attitudes

Leaves = Gender practices

You will have half an hour for your discussion and tree analysis.

Select someone in your group to report back in plenary on the discussion your group had in developing drawing.

Empowerment Framework¹

- Empowerment refers to a process that gives specific groups of men and women greater control and power over their lives.
- As such, it's underlying premise is that greater gender equality will be achieved by empowering women and men in different ways and at different levels.
- The Empowerment Framework examines changes in women and men's empowerment from five different perspectives.
- The five main categories of analysis are:
 - Welfare
 - Access
 - Critical Awareness
 - Participation
 - Control and Ownership

¹ Material adapted from: Dana Peebles. 2006. OAS Staff Gender Toolkit

Since the unequal power relations that exist between women have led to women having a subordinate status even within the same class, you may find that your analysis tends to focus primarily on women's situation. However, it is important to conduct any gender analysis from both a male and female perspective to understand how any given inputs will affect both sexes – both as separate groups and in relation to each other.

To use the Framework, you need to determine what the situation is for the specific groups of women and men concerned at each of the following empowerment levels.

Welfare: The welfare level refers to any action or input that increase women and men's material welfare (e.g., their nutritional status, security, health, income, etc.) and which increases their quality of life through the provision of basic needs.

Access: As in the Access and Control Framework, access refers to women and men's access to resources such as land, credit, labor, services and other factors of production. Empowerment at this level means increasing women and men's access to these resources and ensuring that both sexes have equitable access to them.

Critical Awareness: In the process of trying to improve their lives women and men face many obstacles. Gender discrimination is an important underlying cause of poverty. To be able to deal with this discrimination effectively, both women and men must first become aware that it exists. Therefore empowerment at this level means becoming sensitized to and rejecting the belief that women's lower socio-economic status is part of the natural order and that they have less value than men.

Policy, program or project activities at this level encourage people to analyze society critically and recognize discriminatory practices for what they are and not as something that is either acceptable or permanent. It involves developing a belief in equality between women and men people as a basic human right. It also means developing strategic inputs that will foster the creation of a more equal environment.

Participation: Refers to empowerment with regard to decision-making at all levels. The gender gap between women and men's participation in both formal and informal decision-making processes is a highly visible phenomena and one that is easily quantified. Increasing empowerment at this level means development policies, programs and projects have to work to foster increased representation in the public sphere and to put mechanisms in place that ensure that women and marginalized men are represented in the needs assessment, problem identification, project planning, management, implementation and evaluation processes.

Control and Ownership: The gender gap at this level is also due to unequal power relations between women and men. It is based on an imbalance between male and female ownership of the means of production and control over decisions regarding their allocation and use. To increase empowerment at this level implies finding innovative ways to foster increased ownership and control by the gender groups which currently do not have much control or ownership.

A policy, or project can work to increase women and men's empowerment at just one empowerment level or all five. The important thing is to determine where the greatest need is and to focus resources at those levels.

Gender Analysis & Planning Guideline: The Empowerment Framework

To conduct an Empowerment Framework gender analysis, you will need to ask collect data that will answer the following types of questions:

- **Welfare** (practical interests)
 - Which basic needs can your policy, program or project address effectively?
 - What are the main gender gaps with regard to women and men's welfare in this sector?
- **Access** (practical needs and strategic interests)
 - What are the key resources to which women and men need increased access?
 - What kind of inputs and activities can your policy, program or project put into place that will increase women and men's access these resources and make their access to resources more equitable?
- **Critical awareness** (strategic interests)
 - What is the relative position of women and men in this situation?
 - Are the specific groups of women and men you will be working with aware of why they are in a relatively disadvantaged position with regard to their access and control of resources and their participation in decision-making in their community or organization?
 - Are women and men aware of their position relative to the opposite sex?
 - What kinds of strategic measures can you put in place through your policy, program or project that will increase men and women's critical awareness of the key forms and causes of gender discrimination that are affecting them in this situation?
- **Participation** (strategic interests)
 - how much participation was there for women and men prior to the policy or project implementation? (quantitative data)
 - at what level did women and men participate prior to policy or project implementation? (qualitative data)
- **Control and ownership** (strategic interests)
 - which groups, organizations or individuals owned or controlled the key resources prior to the policy or project implementation?

- how were these groups, organizations or individuals differentiated by sex?

In some instances, you may decide that it is only possible or practical to try and effect changes in empowerment at two or three of these levels. You will also need to keep in mind that all five levels are closely interrelated. Therefore what occurs at one level potentially can have an impact on all the other levels.

Sustainable Tourism through Safety & Security Management Project Case Study²

An APEC economy has applied for funding to help implement a project designed to help them sustain tourism by managing safety and security.

The project involves a series of both preventative and law enforcement functions. These include the following:

1. The production of a series of pamphlets in multiple languages on different safety issues such as recommendations on what to do when leaving the airport; safe places to visit and to avoid; advice on security in hotels; and a code of ethics and behavior for foreign visitors
2. The establishment of a Municipal Tourist Police that will operate in the main tourist centers and locations, and on the roads leading to them.
3. The economy concerned is focusing on quality more than quantity and, therefore, has placed special emphasis and importance to training the agents to make up this force. Before selecting them, short courses will be given on subjects related to their job, the importance of tourism to the country, human relations, and a working knowledge of English.
4. Since it will be a municipal police force, it will be made up exclusively of persons coming from the relevant communities or cities. In this way, they will be certain to have an excellent knowledge of the tourist attractions in the area and satisfactory relations with the community.

Planning discussions related to this project have raised the need to take gender equality issues into account and to do a prior gender analysis. Some of the Ministry of Tourism officials and the municipal authorities do not understand what gender equality has to do with tourist-focused crimes and attribute the main problems to:

1. Direct robbery of persons in city streets or parks;
2. Attacks on vehicles between airports and hotels;
3. Attacks on tourist vehicles on roads and highways in the country;
4. Attacks on tourists visiting national parks;
5. Acts of corruption on the part of officials at the ports of entry;
6. Exploitation on the part of dishonest employees of transportation companies, who charge arbitrary rates.

² Adapted from OAS publication: Sustaining Tourism by Managing Safety and Security at the Destinations: Tourist Security and the Host Community, OAS website – under publications, August 16, 2002.

Instructions:

Divide into small groups of 5 to 6 people.

First

Discuss and analyze the following question:

1. What do you think are the main gender equality issues that the Ministry of Tourism and the municipal police authorities need to address in a gender analysis process prior to finalizing the project design?

Second:

Fill in the Empowerment Analysis table that follows based on the list of the four primary project activities outlined above to determine what kind of impact they could have on the five different levels of empowerment for the main groups of men and women concerned.

To fill in the empowerment matrix below for each empowerment level: answer the questions:

1. Which specific groups of men and women are supposed to benefit or will be most affected by this project/program activity? You can enter this information in the assumptions column.
2. Will this project activity lead to increased empowerment for women and men from these specific groups in any of the five empowerment categories? Write in yes or no for each sex for each empowerment category.
3. Based on your initial basic assessment, do you think this project is likely to lead to greater empowerment for men or women in any areas? If so, how and why?
4. Where your analysis shows that there are still gaps in empowerment between women and men at any of the levels, within the context of this project, what kinds of measures do you think this economy could put in place to reduce these gaps?

Empowerment Framework Matrix

Project Input or Activity	Welfare		Access to resources		Critical Awareness		Participation		Control & Ownership		Assumptions	
	F	M	F	M	F	M	F	M	F	M	F	M

The Chocolate Challenge³

Key Messages:

When planning policy or projects that are gender-integrated, it is important to keep the end target in mind. For this reason, it is important to focus on developing initiatives that will lead to equal results as opposed to simply providing equal opportunities. This is an important principle to establish in the gender budgeting process as well.

Equal opportunity means treating women and men exactly the same.

Equity is the process of treating men and women fairly.

Increased equity for women and men leads to greater equality in their conditions and status.

Presentation: Gender and Trade: Tools to Measure, Tools to Integrate

(refer to powerpoint presentation section)

Presentation: Framework for the Integration of Women in APEC

(refer to powerpoint presentation section)

Closing Exercise: Clear and Muddy Points⁴

Objective

- To help participants critically reflect on your learning from Day 1 in relation to your own workplace context/s.

Explanation

The purpose of the exercise is to provide you with feedback on day 1, as well as inform the trainers of any points that still need clarification.

Muddy points are issues that you on which you require further clarification.

Clear points are something that you think you will be able to take from the workshop – something new a you have learned or seen in a new light that you think will assist you with your work.

Time: 15 minutes.

³ Adapted from: Kartini International. 2002. OAS Gender Mainstreaming Project: Gender Training Program.

⁴ Exercise adapted from: Susanne Schech and Rhonda Sharp. 2007 APEC Gender Analysis Workshop Training Manual.

Instructions

Write on the white card the most useful learning for your workplace/s, or you personally, from the training activities today. Write on the yellow card what is still unclear for you from today's workshop activities.

Trainer will collect and group the cards by categories, and overnight summarize the main points and clarify any outstanding areas of confusion at the beginning of the next day's workshop.

Homework:

Read over: Project Proposal: Best Practices to Support Micro and Small Entrepreneurs: Assessment and Recommendations for APEC Phases I – III (2006/BMC2/018 SME)

Program – Day Two, May 16, 2008

Presentation: Gender Analysis Tool - Practical Needs and Strategic Interests

(refer to powerpoint presentation section)

Background Materials: Practical Needs and Strategic Interests

Policies, programs and projects can focus on initiatives that address either women and men's practical needs or their strategic interests, or a combination of both. The main differences in programming approaches are summarized below. Depending upon what kind of gender equality result you are hoping to achieve, you can use this as a guideline to help determine what kinds of approaches you need to take in your area of work.

Comparison of Practical Needs and Strategic Interests

Practical Needs	Strategic Interests
<ul style="list-style-type: none"> • Are immediate and short term needs that focus on basic needs (food, shelter, etc.) 	<ul style="list-style-type: none"> • Contribute to long term structural change that foster increased gender equality
<ul style="list-style-type: none"> • Are unique to particular groups of women and men 	<ul style="list-style-type: none"> • Are common to all women and to specific groups of disadvantage men
<ul style="list-style-type: none"> • Are easily identifiable 	<ul style="list-style-type: none"> • Relate to women and men's disadvantaged position, their subordination to other groups, their lack of resources and education, their vulnerability and poverty and the impact of violence on their lives • Analyze the root causes of these disadvantages which are not always easily identifiable by the groups concerned
<ul style="list-style-type: none"> • Are addressed by providing specific inputs such as food, hand-pumps, clinics, credit, skills training, etc. 	<ul style="list-style-type: none"> • Are addressed through discussions and analysis, the promotion and strengthening of civil society organizations that target the issues in question and by lobbying for legal and policy changes
<ul style="list-style-type: none"> • Tend to involve women and men as beneficiaries and only sometimes as participants 	<ul style="list-style-type: none"> • Involve women and disadvantage men as key agents of change and actively seeks ways to enable them to become change agents
<ul style="list-style-type: none"> • Use inputs to improve the condition of women and men's lives 	<ul style="list-style-type: none"> • Can improve the position and status of women and men
<ul style="list-style-type: none"> • Focus on improving living conditions, but do not actively work to alter traditional gender roles and relationships 	<ul style="list-style-type: none"> • Can lead to a change in women and men's positions relative to each other as well as in their respective gender roles
<ul style="list-style-type: none"> • Can enable women & men to improve their condition in life 	<ul style="list-style-type: none"> • Can empower women and men to transform their relationships with each other

Gender Analysis and Planning Guideline: Strategic Interests and Practical Needs⁵

When you analyze a policy, program or project, you can determine whether it will be addressing women and men's strategic interests by asking if it will contribute to any of the following:

- ❑ Will women and men become agents of their own development? (strategic interest).
- ❑ Will there be a full consultation with – and involvement of – the women and men to be affected by the program, project or policy?
 - This includes their involvement as managers and planners, in education and training, and their long term access to resources and decision-making processes (strategic interests).
- ❑ Is there an explicit strategy to ensure that women and men's strategic interests will be taken into account, including the promotion of good governance policies that are inclusive of both women and men?
- ❑ Are you providing one time resources to a group of people (practical needs) or will it lead to sustainable and increased economic security, independence, options and opportunities for men and women? (The latter are strategic Interests since security and independence are longer term and involve more strategic decisions).
- ❑ Will it lead to increased shared responsibility for the reproductive work traditionally done by women with men and the state? (Strategic interests & practical needs)
- ❑ Will it foster the organization of groups to support networking, advocacy and action in the sector concerned? (Strategic interests)
- ❑ Will it help build linkages and alliances with mainstream advocacy and interest groups? (Strategic interests)
- ❑ Will it increase representation and access to political power for women and men, particularly at the lower income levels or for groups that are otherwise marginalized such as indigenous peoples? (Strategic interests).

⁵ Excerpt from: Dana Peebles. 2006. OAS Staff Staff Gender Toolkit

Exercise: Practical Needs-Strategic Interests - Large Group Discussion

Determine whether the following mini-case studies address women's practical needs or strategic interests by answering the following questions.

Questions:

- 1 Does this project address practical gender needs and/ or strategic gender interests?
- 2 Does this project have the potential to address strategic interests?
- 3 What changes would have to be made to the project?

DAYCARE ACTION, LIMA, PERU

A small group of dedicated women in Lima undertook a 3 year research project on the needs for childcare and its accessibility. As a result of their study, which carefully documented the fact that the majority of poor women have no access to safe, affordable childcare, they set up two pilot daycares as models to be studied and replicated.

Based on the findings of their study, the group has begun a campaign to lobby politicians for government support to daycare. A public education campaign on the issue of childcare is planned next year.

REVOLVING COW FUND, GUJARAT, INDIA

Landless women in rural India are given a milk calf and training in milk production, animal care and feeding, etc. In return for receiving the cow, the women must ensure that the cow is healthy and give the first two offspring of her cow back to the 'Revolving Fund'. These calves are then given to other women and so on.

BUSINESSWOMEN'S TRADE MISSIONS

Eleven years ago, in 1997, the Canadian government in partnership with the private sector, initiated a series of women-only trade missions, starting with a trade mission to Washington DC. They did this as women entrepreneurs, particularly those whose businesses were still relatively new found that their smaller businesses did not get that much attention when they participated in trade missions with larger, mainstream and well-established businesses. Some of the women entrepreneurs also expressed that they were more comfortable networking initially with other women's businesses. The first trade mission received considerable media attention and led to a higher number of business matches than usual for typical trade missions.

CASE STUDY: ZIMBABWE LEGAL ACTION PROGRAM

Since independence in 1980, the law has been changed to recognize women as legal 'majors'. Women over 18 years of age are now legally entitled to hold bank accounts in their own name, to enter into legal contracts, to inherit property and are entitled to half of the family property after a divorce.

Under the Legal Education Program, women are trained as community legal workers and travel to villages to meet with women and explain their rights to them.

Presentation: APEC Gender Framework and Checklist

Access and Control Framework

Gender analysis based on access and control issues is based on an analysis of the division of labor by sex in the reproductive, productive and community spheres, and of the differential access that women and men have to the resources and benefits involved in the development process.

Summary of Key Access and Control Framework Elements

<p>1. The sexual division of labor</p> <p>You need to determine what is the division of labor by sex in the productive sector as well as at the community and household levels as it can have a significant impact on policy, program or project results.</p>	<ul style="list-style-type: none"> ▪ Women and men’s responsibilities in any given sector vary from culture to culture and from community to community. ▪ This division of labor is dynamic and can change over time. ▪ It is often based on the perception that certain characteristics are inherently male or female and are unchangeable, when in fact they are shaped by ideological, historical, religious, ethnic, economic and cultural factors, all of which change over time.
<p>2. Types of work</p> <ul style="list-style-type: none"> • Productive • Reproductive • Community <p>You will need to determine which of the three levels of work your policy, program or project will affect and determine the division of labor by sex within each of these three levels of work.</p>	<p>Productive work: refers to any work related to the production of goods and services for consumption and trade</p> <p>Reproductive work: involves the care and maintenance of the household and its members (bearing and caring for children, food preparation, water and fuel collection, shopping for household support and consumption, housekeeping and family health care)</p> <p>Community work: involves the collective organization of social events and services, ceremonies, celebrations, community improvement activities, local political activities, etc. This can be voluntary or paid work.</p>
<p>Access to and Control over Resources and Benefits</p> <p>You will need to determine which sex has control over and access to the resources they need to support their activities in the productive, reproductive and community spheres and how this will affect the planning process and the results you need to achieve.</p>	<ul style="list-style-type: none"> ▪ Men and women traditionally have different levels of access to resources and control over the means of production and the right to obtain services, products or commodities in the private (household) or public spheres. ▪ Gender gaps in access to and control over resources are a major obstacle to development for women, girls and marginalized men.

Key Issues to Consider

The Access and Control Framework is essentially economic in nature. It’s underlying premise is that gender inequality is a form of economic inefficiency and

that policies, programs and projects will be more effective if they ensure more balanced gender equality.

Division of Labor by Sex:

Reproductive Labor

- Since women tend to have the main responsibility for reproductive labor, they work an average of two to five hours more per day than men in almost all countries, especially in the rural areas.
- Gender analyses of the sexual division of labor often shows that women's labor is actually over-utilized as opposed to under-utilized. Therefore it is critical to ensure that new policies, programs and projects do not increase women's workloads or work to decrease them.

Productive Labor

- Productive labor is divided fairly evenly between women and men, but most labor statistics show higher levels of male participation in the labor force since governments generally only measure participation in the formal sector and many women work in the informal sector.
- Within any given sector, women and men's labor tends to be sex differentiated but highly interdependent. For example, the men will fish and the women will dry and process the fish caught or, in the agricultural sector, the men will plow and the women will weed and hoe, or in urban areas, women may be responsible for cleaning community latrines and the men for their physical maintenance.

Some policy implications of the division of labor between women and men in the productive sector include:

- women and men's unpaid work is not taken into account in national statistics or resource allocation.
- women and men's labor in the informal sector is generally not taken into account in economic policy development.
- a policy that affects men's labor in a particular sector will have an impact on women's labor in the same sector and vice versa.

Community Labor

- Community (or social) labor generally does not confer power on the worker. However, it often can bring them increased social status.
- Political labor at the community or micro level:
 - can be either paid or unpaid.

- confers power and status on the person doing the work.
 - is predominantly done by men.
 - requires a public presence.
- Community work done by women is generally unpaid and is often ascribed a lower status than that done by men
 - Because the division of labor by sex differs greatly from community to community and from country to country, it is not safe to assume that a policy, program or project will have a uniform impact on women and men.

Access to and Control over Resources and Benefits

When developing new policies, programs or projects staff will need to identify the specific resources and benefits associated with women and men's different labor roles and determine if they have an equal or differential access to, and control over, these factors of production. These can include:

- land, capital, time, education, political power, external income, training
- technology, credit, networks, etc.

To conduct an Access and Control gender analysis staff would need to:

- Go to the actual communities involved or work with a sample community that is representative of the communities in the region.
- Identify the main groups of women and girls and men and boys in the community.
- Interview a representative sample of these groups to find out what the actual sexual division of labor is in the key sectors affected by the proposed OAS program, project or policy.
- Determine if there are any significant gender gaps in women and men's access to and control over the primary resources in the sector in which you are working.

If staff do not have the resources to conduct community-level interviews, they can conduct a literature review to see if there is existing research or statistics available that can provide them with this data. Civil society organizations, national statistics agencies and universities can be valuable sources of this information.

APEC Gender Framework Checklist follows.⁶

⁶ Original checklist excerpted from: Susanne Schech and Rhonda Sharp. 2007 APEC Gender Analysis Workshop Training Manual.

Framework 1: APEC gender framework and checklist

The APEC gender framework recognises gender as a cross-cutting theme in APEC. It encompasses three inter-related elements:

- gender analysis (a methodology for examining the differences in women's and men's lives, and the impacts of APEC strategies and projects on women and men)
- collection and use of gender-disaggregated data (to make gender analysis possible)
- involvement of women in APEC (to increase women's participation in APEC fora and decision-making).

Gender analysis aims, among other things, at increasing the effectiveness of APEC projects. These projects should recognise and support the role of women in achieving sustainable development' (Criteria for Assessment of APEC Projects, approved by SOM in October 1995, revised by BMC July 2000, October 2002).

Following is an edited version of the checklist that has been developed for the gender assessment of APEC project proposals. The checklist is informed by the Framework for the Integration of Women in APEC. Both are available on the APEC website:http://www.apec.org/apec/apec_groups/som_special_task_groups/gender_focal_point_network.html#

Checklist with questions	Your comments based on the project case study
Women will be consulted on the design and implementation of the project	
- Will women be consulted during the development of the project?	
- Will women's views be incorporated into the project?	
- Will the project identify relevant women's networks in the Linkages section?	
- Will women be consulted during the implementation of the project?	
- Are any elements of the project budget allocated to areas that are relevant or of interest to women?	
- Will women be consulted on the project budget?	
Sex-disaggregated data will be collected and used in the project	
- Will the project collect and use sex-disaggregated data or information?	
- Will the impact of the project on women and men be considered?	

Checklist with questions	Your comments based on the project case study
<p>The project will be beneficial for women</p>	
<ul style="list-style-type: none"> - Will the project focus on women? 	
<ul style="list-style-type: none"> - Will the project involve industries or areas of the labour market or community that are likely to benefit women? 	
<p>Efforts will be made to address potential adverse effects on women</p>	
<ul style="list-style-type: none"> - Will the impact of the project on women and men be considered? 	
<ul style="list-style-type: none"> - Can you identify any areas of the project that could have a potential negative impact on women? 	
<ul style="list-style-type: none"> - If so, are you able to modify the project to limit these effects? 	
<p>Women's involvement is assessed in the evaluation of the project</p>	
<ul style="list-style-type: none"> - Will the impact of the project on women and men be considered? 	
<p>Information on the project will be disseminated to women</p>	
<ul style="list-style-type: none"> - Will you consider ways to communicate the results of the project to women? 	

Exercise: Using Different Gender Analysis Frameworks to Review APEC Proposal

Objectives

- To provide practice applying different gender analysis frameworks to an APEC project proposal

Time: 40 Minutes

Instructions

1. Form into small groups of 5 -6 people.
2. Read the Case Study sample project proposal: Best Practices to Support Micro and Small Entrepreneurs: Assessment and Recommendations for APEC Phases I – III (2006/BMC2/018 SME) which follows these instructions
3. Analyze and discuss what progress has been achieved in integrating gender into the work of the APEC fisheries group using one of the gender analysis frameworks presented
 - Groups 1 & 2 – Use APEC Gender Framework
 - Group 3 – Use the Empowerment Framework
 - Group 4 & 5 – Use the Access and Control Framework

All groups assess if this project has used a practical needs or strategic interests approach to gender equality issues.

Gender analysis tools for this exercise follow after the case study materials.

5. Assess how useful the gender analysis framework your group used was for this assessment process (i.e., what worked well, what was missing, etc.)
6. Be prepared to present your assessments to the group.

Case Study for Exercise – Comparison of Gender Analysis Tools

Best Practices to Support Micro and Small Entrepreneurs: Assessment and Recommendations for APEC Phases I – III (2006/BMC2/018 SME)⁷

Project Objectives

1. *Describe briefly how this project directly responds to the priorities set by APEC Leaders and Ministers and/or the vision of the host economy. Please make reference to the relevant parts of APEC documents.*

At the 9th SME Ministerial Meeting in Acapulco, SME Ministers recognized that attention to micro-enterprises promotes progress towards APEC objectives in terms of gender equity, economic growth, poverty alleviation and the overarching goal of shared prosperity. The initial focus of the Sub-Group on Micro-Enterprises of the SME Working Group emphasized that micro-financing was crucial for the expansion of microenterprises. It also determined that ‘work programs and operational projects must be designed to address the unique policy issues facing microenterprises to facilitate their participation in the formal market system, enable them to develop on a sustainable basis, and become the groundwork of economic development in the region’ (Microenterprise Development Action Plan, Chiang Mai, 2003).

APEC data from 20001 indicated that there were about 49 million non-agricultural SMEs and MEs in the region, with half of them being in China and Indonesia. In the region as a whole, they made up about 95% of all enterprises and employ approximately 80% of the workforce. It is also of note that 35% of APEC’s SMEs are women-owned – and that this percentage is even higher in the microenterprise sector where the majority of enterprises are women-owned in most APEC economies. In both rural and urban areas, SMEs and microenterprises are the largest source of employment and net new jobs, especially for women and youth. Microenterprises are more numerous than SMES and make up approximately three-quarters of all enterprises in the APEC region. Microenterprises are also more important in terms of employment in the less-industrialized economies.

While most SMEs and microenterprises work within their own domestic markets and are unlikely to grow in size, a small proportion of SMEs and microenterprises are internationally oriented and have high growth potential. There is also another group of microenterprises that has the potential to become export oriented if they can access the right program supports or if their governments create an enabling policy environment. These include small scale producers with a wide range of products and services to offer, particularly in the handicraft and tourism sectors, and increasingly in the service sector. Many also have a good track record with regard to the generation of innovative technologies, products and services. A third group that has great potential for growth is domestically-based, but with the right supports could link up with a range of larger businesses already involved in export as suppliers of either products or

⁷ Adapted from APEC proposal prepared by Dana Peebles, Francine Whiteduck and Andrina Lever.

services. Their business growth thus would remain domestically-based but would be strengthened by the export connection along the supply chain.

2. *Describe the key objectives of the project – usually no more than three*

1. To increase APEC's knowledge and understanding of successful support strategies to support.
2. Growth for micro- and small-scale entrepreneurs in developing and developed economies with a particular emphasis on increased international trade linkages, to inform the development of future microenterprise support programming and policy.
3. To identify the most effective microenterprise policy and program support models that foster increased growth for microenterprises, increased international trade, and microenterprise network development which are the most effective in different economic contexts.
4. To provide APEC economies with a set of detailed guidelines (a 'tool box') for establishing microenterprise growth policies and programs based on the most successful models, with a particular emphasis on women's microenterprises, indigenous microenterprises and rural microenterprises.

3. *Describe precisely the expected project outputs. Describe how these outputs will benefit the targeted beneficiaries.*

Output 1. Report documenting seven different strategies to support micro-enterprise development through increased trade links drafted and distributed to relevant APEC bodies (SME Working Group, MESG, ABAC).

Benefits. Increased awareness of potential of microenterprises to successfully engage in international trade and of support approaches that can increase this potential among APEC bodies and member economies.

Output 2. Organization and delivery of a workshop to present the strategies and potential policy and program support models to representatives of the business community, women's associations and Ministries of Commerce, Trade and Trade Promotion Offices from developing economies of APEC immediately following the 2006 Women Leaders Network Meeting in Vietnam.

Benefits. Increased awareness of effective policy and program support models to support microenterprises successfully engage in international trade among businesswomen's organizations, women entrepreneurs, academics involved in international trade research, NGOs that support Microenterprises and women's ministries in APEC economies.

Output 3. Organization of a seminar to present the different microenterprise development strategies and policy and program support models to the MESG in Vietnam prior to the SME Ministerial Meeting.

Benefits. Increased awareness among MESG and SME Working Group of

effective policy and program support models to support microenterprises, particularly microenterprises run by women and indigenous people or those in rural areas to successfully engage in international trade.

Output 4. Feasibility studies on the three most relevant models selected through the workshop process that would include an assessment report on three existing programs in three APEC economies, the development of detailed guidelines on the different program and policy models, an outline of resources needed to establish them and a clear description of the methodology and approach used, and a pilot program proposal for each program model.

Benefits. Increased access of APEC bodies, governments, business associations, research institutions and businesses to guidelines, have been field tested, on how to establish policies and programs that will foster microenterprise growth through increased international trade links that.

Output 5. Dissemination of policy and program guidelines to support micro-enterprise development to APEC Ministries of Commerce, Trade, Trade Promotion Offices, and Women, businesswomen's associations, NGOs working with microenterprises and academic institutions involved in research on this sector. Project designers and officers will have access to a workbook that details the policy and program guidelines that have been field tested. They will be able to draw from these when developing their own support programs for micro-enterprises.

Benefits. Increased access of APEC bodies, governments, business associations, research institutions and businesses to specific information needed to establish policies and programs that will foster microenterprise growth through increased international trade links.

4. Linkages

Active Participation

Describe how the intended beneficiaries among APEC stakeholders –APEC fora, governments, private sector and civil society, men/women- will participate in the planning, implementation and evaluation of the project.

- Representatives of key stakeholders from women's ministries, ministries of commerce, ministries of trade, trade promotion offices, NGOs working with microenterprises, business and businesswomen's associations and academic institutions will be invited to participate in the feedback workshop held after the 2006 WLN Meeting or at the MESG in Vietnam to help select the most relevant support models. If they cannot participate in person, then they will be asked to provide written feedback on the models presented by email.
- WLN members will also circulate the paper to its members and ask them to gather further feedback in each APEC economy.
- The feasibility study will be assessing existing microenterprise support programs in three APEC economies. This will involve consultations with the primary stakeholders in these three economies.

5. Project Influence

Describe how this project might contribute to any current or completed projects or activities in APEC or elsewhere. Why is APEC the most appropriate institution to fund.

APEC is the most appropriate institution to fund the project as it is Asia-Pacific region that is covered by the feasibility studies, the WLN is closely associated with APEC and will be drawing upon APEC networks to document the best practices in the region and will be designing the feasibility studies and the related model guidelines to fit the specific needs of APEC economies. In addition, the project proposers have received considerable support from CIDA, Industry Canada for the first two phases of this project as well as over the past 10 years of WLN meetings.

6. Methodology

Describe the project's methodology. Break down the project implementation into discrete functional steps over time with the associated outputs clearly specified. Identify the principal risks involved in each step if any, and explain how they will be managed. Risks may include major delays and failures, expected cooperation not materializing, etc.

Time Line Summary of steps needed Funding required

Phase I: Jan – March 2006

- Report on seven different strategies to support microenterprise development through the strengthening of international trade links

Self –funded (CIDA grant)

Phase II: March – October, 2006

- Proposal revision based on feedback from MESH
- Workshop organization & delivery
- Selection of three specific policy and program support models to participate in the feasibility study

Self-funded (Industry Canada)

Phase III: November 2006 – December 2007

November - December 2006:

- Final assessment and selection of models from Phase II, development of criteria, outline and guidelines for feasibility study for three selected models

January - May, 2007:

- Researching and examining policy and programs support models in specific economies to be identified at the end of Phase II, travel to target economies, conducting in depth interviews with key participants

June - August, 2007:

- Developing the detailed guidelines outlining the policies, methodology and resources needed to establish support models elsewhere, review of guidelines by key stakeholders

September - December, 2007:

- Finalization of drafts, development of database of recipients, print and CD

versions finished, dissemination of the model practices, feasibility study report, support model guidelines to stakeholders
APEC funding requested

Phase IV: Jan 2008 – Dec 2011

- Pilot project to implement the three most effective policy and program support models in volunteer APEC economies

Funding for pilots to be sourced from participating economies

7. Dissemination of project output

Please include a plan for the publication and dissemination of the results of the project, including:

a. the nature of the target audience

- The target audience will include Ministries of Commerce, Ministries of Trade, Trade Promotion Offices, Ministries of Women, business associations, non governmental organizations working with microenterprises, women's and indigenous people's organizations, academic institutions conducting research on micro-enterprises and microenterprises with potential for developing international trade links.

b. the form and content

- The results will take the form of an overview paper on the best practices to support microenterprise growth through increased international trade and guidelines based on the feasibility studies that outline the policies, program methodology and resources needed to establish the three models identified as the most relevant to APEC economies.

c. format (e.g. hard copies, floppy discs, internet uploading)

- The best practices paper and the guidelines will be produced in hard copy for the specific meetings at which they will be presented and in electronic format (both CD-ROM and as email attachments) for distribution to the different stakeholders in each APEC economy.

d. number of copies for the publication

- 200 copies of the paper will be distributed at the WLN Meeting in September 2006.
- 100 copies of the paper will be distributed at the SME Meeting in Vietnam in September 2006
- 400 CD copies of the feasibility study and guidelines for distribution to the relevant stakeholders (Ministries of Commerce, Ministries of Trade, Trade Promotion Offices, WLN, Ministries of Women, Business associations, NGOs and academic institutions)

8. Gender concerns

Many projects have the potential to affect men and women differently because of their different roles and positions in many societies. What steps does this project take to ensure that it benefits both groups and in particular does not disadvantage women? (Common responses include: using gender analysis to design project methodologies and inputs (e.g. surveys); including women in the planning, management, allocation of resources and implementation of a project; taking steps to ensure equitable participation by men and women; making special efforts to disseminate project results to women; and using sex-disaggregated data for project assessment.)

- This project will include a gender analysis of each strategy, policy and support model proposed as well as examine them from the perspective of their utility to indigenous and rural peoples.
- Data will be disaggregated by sex and ethnic background as much as possible.
- Working through the Women Leaders Network will help ensure that women's voices and participation are explicitly included in the project.
- The best practices paper, feasibility study report and model guidelines will be distributed to women's ministries, businesswomen's associations and women's NGOs. They will also be distributed more generally to Ministries of Commerce, Ministries of Trade, Trade Promotion Offices, business associations, academic institutions and at the SME meeting to also ensure men's participation.
- The project management includes substantial female representation and each consultant is recognized as a leading gender advocate in her field.

Show how the objectives of the project provide benefits for women.

APEC Ministers have indicated (Framework for the Integration of Women in APEC) that benefits might include:

- increasing the involvement of women in the economy and economic institutions; integrating women into the global economy; strengthening small and medium sized enterprises; and reducing gender inequalities, including through education and training.
- The project will:
 - increase the involvement of women's microenterprises in international trade networks
 - strengthen women's microenterprises
 - help integrate women's microenterprises in the global economy
 - increase awareness of the specific needs of women's microenterprises among Ministries of Commerce, Ministries of Trade, Trade Promotion Offices, business associations, NGOs and academic institutions.

Exercise: Gender Analysis Tools for Group Work

Groups 1 & 2 – Refer to APEC Gender Framework and Checklist in Powerpoint presentation package and answer the relevant questions on this checklist for the Women's ME Support Models project case study.

Group 3 – Use the blank Empowerment Matrix form used in the Empowerment Framework exercise to assess the Women's ME Support Models project.

Groups 4 & 5 – Use the Access and Control charts that follow to make your assessments.

Practical Needs and Strategic Interests Questions for all groups:

Questions:

1. Does this project address practical gender needs and/ or strategic gender interests?
2. Does this project have the potential to address strategic interests?
3. What changes would have to be made to the project?

Access and Control Profile

Fill in the chart below by answering the following questions:

1. What kinds of resources or benefits will this project bring for women and/or men?
2. In what ways will the project change women and/or men’s access to these resources or benefits?
3. In what ways will the project change women and/or men’s control over these resources or benefits?
4. What factors do you think will be the most significant in terms of influencing how widely the proposed guidelines for support programs and policies for women’s micro-enterprises will be used/adopted? How will these influencing factors affect women and/or men’s access to and control over the resources they need to grow their micro-enterprises into businesses that can trade either internationally or become suppliers to larger domestic companies that export their goods or services?
5. This project focuses primarily on women as a target group. Does that make it discriminatory in nature?

Access and Control Profile					
Resource/Benefit (List)	Access		Control		Influencing Factors
	Male	Female	Male	Female	

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Macro Level Gender Analysis Tools

KEY MESSAGES:

The following tool focuses on policy impact. It combines elements of the previous gender analysis tools and requires the participants to identify the specific target groups that the policy will affect and then to develop a checklist of sector-specific questions to support the analysis.

The main question they will need to keep in mind when carrying out gender analysis of the likely effects of the policy is: 'what is the policy's likely contribution to promoting gender equality?'

We have set up the Matrix outlined below as a guideline for analytical categories as opposed to an actual chart that they need to fill out.

Gender-Integrated Policy Matrix & Question Checklist

1	2	3	4		5		6
Policy & Sector	Purpose	Implementing Institutions	Analysis of Expected Impact on Different Groups		Possible Unintended Impact on different groups		Mitigating Actions Required
			Examples of Specific Groups		Examples of Specific Groups		
			Male	Female	Male	Female	
			Poor		Poor		
			Urban		Urban		
			Rural		Rural		
			Landless		Landless		
			Indigenous		Indigenous		
			Children		Children		
			Small business		Small business		
			Etc.		Etc.		

Asking Better Questions: How to Use a Gender Analysis Policy Matrix⁸

The key to successful gender analysis often lies in the questions that you ask.

The matrix above will help you structure your analysis by categorizing policies and their implementers, plus policy impact and implications for both women and men in a specific sector.

Policy (Column 1)

- Give a brief description of the proposed policy
- Identify the primary sector concerned

Purpose (Column 2)

- What is the purpose of the policy intervention?

Implementing Institution (Column 3)

- Which government bodies are responsible for implementing the proposed policy?
- Which non-governmental institutions in your economy will be responsible for policy implementation?

Analysis of Impact on Different Groups (Column 4)

- Identify the primary groups of women and men that will be affected by this policy.
- What do you think will be the anticipated effects of the policy on these specific groups within the sector concerned?
- Disaggregate your analysis by sex for each target group.
- Be explicit about the criteria that you are using to assess whether or not this impact is negative or positive.

Possible Unintended Impact on Different Groups (Column 5)

- Assess whether or not you think the proposed policy will be likely to have unintended impacts on any of the specific groups you have identified in their different spheres of responsibility.
- When conducting this analysis keep factors such as the sexual division of labor, access and control of resources and practical needs and strategic interests in mind.

Mitigating Actions Required (Column 6)

- Ask if the policy will contribute towards increased gender equality or equity.
- If not, outline alternative courses of action that the major stakeholders could take.
- If you have identified a potential negative or uneven impact to the policy, develop a mitigation strategy for the specific target groups affected.

Influencing Factors Within a Policy Context

Other influencing factors that you will need to keep in mind include:

- macro policy issues
- legal issues
- regulatory issues
- administrative issues

Macro Policy Issues

These include:

⁸ Excerpt adapted from: Kartini International. 2002. OAS Gender Mainstreaming Project: Gender Training Program Manual

- official declarations of principles, policy pronouncements
- national development plans
- related international conventions

Legal Issues

- These include issues that are written into law that might effect the anticipated impact of the policy for each of the target groups you have identified.
- Keep in mind that policy may be derived from law, or the law may be derived from policy or from customary practice.
- Regulatory Issues
- Regulatory issues are government regulations that apply to the firm or household.

Administrative Issues

- Administrative issues involve direct contacts between government agencies or official institutions and the firm or household, administrative impact on male-owned businesses.

Checklist of Questions to Support Policy Matrix Analysis

Develop a checklist of questions related to potential policy impact for women and men in their major roles in this sector.

Develop your checklist of questions based on:

- Women's and men's key roles in the sector
- Women's and men's roles in the productive, reproductive and community
- Ask if the policy will increase/decrease/maintain women's and men's decision-making in this sector
- Ask if it will increase/decrease/maintain women's/men's income and/or access to and control over resources in this sector (including time)
- Try to determine if this policy will have a differential impact on specific groups of women and men

Sample Question Checklist for Trade Sector

Women and Men As Consumers

1. Will this policy affect prices in this sector?
2. Do men or women make or influence the primary consumer decisions in this sector?
3. What impact do you think that an increase in primary consumer goods in this sector would have on individual and family finances? For example, is it likely to affect family nutrition levels or important consumer purchases and savings/debt ratios?
4. What impact would a decrease in primary consumer goods in this sector would have on individual and family finances?
5. What are women and men's priorities for consumption in this sector? Are they any different?
6. Will this policy affect women and men's consumer power?
7. Is this policy increase/decrease the time it takes women/men to purchase primary consumer items in this sector?

Women and Men As Family Caregivers

1. Will this policy lead to any kind of increase/decrease in the time that women and men have to spend on family care (includes child / elder care, meal preparation, family health care, child education and tutoring, recreation / athletic supervision, etc.)?
2. Will this policy lead to any kind of increase/ decrease in the amount of time that women and men have to spend on house care (includes house maintenance, cleaning, yard work, domestic garbage disposal, payment of utilities bills, rent or mortgage payments, etc.)?
3. Will this policy lead to changes in gender roles or the division of labour in the reproductive sphere between women and men?
4. Will this policy lead to women or men or both having more power over domestic decisions?

Women and Men As Workers

1. Will this policy lead to changes in the conditions of work or pay for women and men, e.g., full-time/part-time, job security, unionization, working hours, kinds and numbers of jobs available, etc.
2. Will this policy lead to a loss/increase in job opportunities for women and men in this sector?
3. Will this policy provide women or men or both with more control over the income that they earn?
4. Will this policy increase/decrease/maintain the level of women's and men's unpaid work in family businesses and farms?
5. Will this policy increase/decrease/maintain in the decision-making levels of male and female workers in this sector?

Women and Men As Business Owners

1. Will this policy lead to any changes in women-led and men-led businesses access to Credit, Technology, Market information, Education and Training, Finances?
 2. Will this policy lead to increases/increases in company sales for women or men?
 3. Will this policy lead to any increase/decrease in the amount of time it takes to operate the business for women or men?
 4. Will this policy lead to an increase/decrease in international trade opportunities for women-led/men-led businesses?
-

Exercise: Briefing Note for Labour Ministers

Briefing Note for Ministerial Meeting of APEC Ministers of Labour

The APEC Ministers of Labour will be meeting to discuss policy issues related to globalization which affect employment and labour dimensions in the Asia Pacific region. Your office has to prepare a briefing note for the Labour Minister from your economy. The APEC Labour Ministers are trying to build a consensus about facilitating migrant labour between APEC economies and instituting policies that will allow migrants from the different economies easier access to work permits in other economies.

Using the Trade Policy matrix format you can ask answer the following questions as part of the preparation process for the briefing note:

1. Which specific groups of women and men will be most affected by this proposed policy?
2. How do you think this policy will affect women and men's role in:
 - the productive sector (as workers)
 - reproductive sector (as family caregivers/providers)
 - community level (social and political support to the local community)
3. Is this proposed policy likely to affect specific groups of men and women as consumers? If so, in what ways?
4. What are the potential areas of negative impact this type of policy might create?
5. What are kinds of mitigating strategies could you suggest in the Briefing Note?

Presentation: Gender Responsive Budgets

(Refer to powerpoint presentations section of manual)

Advocacy Strategies for Gender Responsive Budgets

Within national government ministries:

- Promote change from line item budgets to programmatic and performance based budget process that integrate GRB principles.
- Promote efficient use of resources from a gender equality perspective and work to develop a different measure of efficiency.
- Develop joint proposals across ministries to develop gender sensitive performance indicators, sex-disaggregated data collection, and other strategies to support GRB processes.
- Promote proposals to develop time-use and other surveys that document women's unrecognized contribution to the economy.

In parliament:

- Amend the law governing budgets to include programmatic budgeting.
- Direct budget audits to analyze gender impact of all forms of expenditure: women-specific targeted expenditures, equal opportunity expenditures, and mainstream expenditures.
- Promote the institutionalization of gender responsive budgeting so that it is incorporated into regular government and parliamentary practice and receives sufficient human, technical, time and economic resources.
- At other levels of government: Promote the incorporation of gender-equality targets and sex-disaggregated data registries in all programmes, whether government-run or contracted out

In collaboration with NGOs & Other Interest Groups:

- Support research into how budgets affect gender equality, including surveys, opinion polls, and participatory action research.

Budget Amendments

- Introduce gender-related amendments at the final stages of budget planning, as well as in the implementation phase.
- Introduce and/or amend laws to include gender impact analysis during the audit and evaluation stages of the budget cycle as well as the beginning of the planning stage.
- Negotiate and lobby fellow parliamentarians and other leaders - in coordination across party lines and with civil society groups - to strengthen support for gender- responsive budget amendments.
- Promote multi-year frameworks for medium-term budget policy formulation, and not just on the year to year or annual budget process to increase the possibility of introducing a gender perspective at the outset of the budget planning process.

For Decentralized Budget Processes

- Promote the creation of effective mechanisms to audit whether local governments are spending the actual expenditures committed for gender equity and pro-poor efforts properly.

- Initiate methods or systems to foster popular participation in budgetary processes by
 - local communities. Find ways to ensure that diverse groups of women are included in the local participation process.
 - Create and collaborate with coalitions and networks to create an enabling environment for participation.
-
- Review what other decentralized budget processes have done to date.
 - Track and assess the different skills and capacities related to GRB of the governments to which budget authority has been devolved.
 - Collaborate with counterparts at the different levels of government responsible for
 - budget and economic policy design and implementation to help integrate GRB throughout all these systems.
 - Direct ministry staff and collaborate with central government officials to identify and target the changes in the budget and allocations process needed. Take regional and local differences into account in this process.
 - Monitor the impact of this shift of authority to local or regional level terms as differences between regions or localities will call for diverse intensities in the changes required.
 - Collaborate with civil society including parliamentary committees to contribute to gender-sensitive budget analysis in order to make fiscal policy at the local level more responsive to the needs of women.

Bios: Facilitators and Presenters

Φ Dana Peebles Φ

A versatile professional with 28 years experience in gender and development , adult basic education and skills training plus program and policy supports to women-owned microenterprises and SMEs. Ms. Peebles is the Director of Kartini International, a specialist consulting firm that she established in Toronto, Canada in 1996. She earned her Master's Degree from the Institute of Social Studies in the Hague where she specialized in International Labour Studies and Women in Development. Her BA is from the University of Guelph where she graduated with distinction with a degree in Political Science and Third World Development. Her professional work was recognized with the winning of the CIDA 2000 International Cooperation Award for Gender Equality Achievement.

Through Kartini International, Ms. Peebles has worked on diverse projects related to gender equality. Recent work includes:

- Sr. Gender Analyst, CIDA Afghanistan Trust Fund: 2008
- Gender Strategy, CIDA Pan Africa Program, 2008
- Institutional Gender Policy and Strategy, Caribbean Development Bank: 2008
- UN Gender Architecture Background Concept Paper, UN OSAGI: 2008
- Team Leader, Global Evaluation of Gender Policy Implementation for UNICEF: 2007
- Gender Budgets Advocacy and Gender-Based Violence Kits and other publications for Network of African Women Ministers and Parliamentarians and UNFPA: 2004-2006
- WTO and Gender Research, Status of Women Canada: 2002-2005
- Gender and Labour Analyst, CIDA Inc.: 2004 - present
- Team Leader - Gender Mainstreaming Project, Organization of American States; 2002 – 2006
- Technical Manager of the WLN component of the CIDA-funded Gender in APEC project: 1997-2001

Other international work includes serving as the Project Manager of the CIDA-funded Women's Support Project in Indonesia and as a Strategic Planner for Women and Vulnerable Groups for the Asian Development Bank in Cambodia. She has also worked as a Women's Program Officer for the UNDP in Bolivia and Peru and two years working in an isolated community in the Outer Eastern Islands of Indonesia as a Rural Development Advisor. Ms. Peebles has extensive experience as a researcher on gender equity and trade issues and has worked in the field of adult basic education and skills training for nine years. She has served on the Boards of Directors of the Canadian and African Business Women's Alliance and of the Canadian Association for Women Executives and Entrepreneurs and is currently on the Board of the Toronto School of Art where she is also working on a part-time Diploma in Fine Art.

Φ Lisa Fancott Φ

Lisa Fancott has worked as a Director and Consultant in International Trade and Development for over 10 years. Ms. Fancott has enjoyed assignments with UNIFEM, Oxfam, APEC and the International Trade Centre in Geneva.

Lisa's work in Asia included three years in Vietnam where she directed a bilateral project to develop women's entrepreneurship in three provinces. This included establishing businesswomen's associations, small industry clusters in handicrafts and tourism and assisting in the "birth" of the first national Women Entrepreneur's Council of Vietnam. Ms. Fancott has been involved with the Women Leaders' Network of APEC economies since its inception in 1996.

Throughout her work Lisa has actively promoted Corporate Social Responsibility and "Fair Trade", which encourage firms to adopt a "triple bottom line": profit, environmental sustainability and social justice. Lisa has expanded her gender expertise into the areas of HIV/AIDS prevention and violence prevention, which underline the importance of the service/health sector to maintain vibrant economies.

Ms. Fancott has served on the advisory boards of three programs at Vancouver's Capilano College, including the award-winning post-graduate Asia Pacific Management Co-Operative Program of which she is a graduate and active member of the alumni association. Ms. Fancott earned her undergraduate degree at McGill University in Modern Languages, she has studied twelve languages and is comfortable conversing in eight.

Lisa is currently preparing to publish stories for Western children on non-violent male "heroes" in Asian history. In addition she is strong advocate for women's leadership in faith traditions, which she believes is one of the pillars of a more balanced economic and social transformation in the world.

Φ Heather Gibb Φ

Heather Gibb is the Senior Researcher (Gender Equality and Workers' Rights) at The North-South Institute, an independent policy research institute based in Ottawa, Canada that addresses relations between industrialized and developing countries. Her research interests include temporary labour migration, gender and trade, and workers' rights. Her interest in gender, intellectual property rights and traditional medicinal knowledge derives from her work on gender mainstreaming, gender and trade, and promoting women exporters. She has contributed extensively to APEC's gender integration initiatives, and conducted an assessment of the APEC Ad Hoc Group on Gender Integration, the predecessor to the Gender Focal Point Network, in 2002. In 2004, she coordinated the first "gender" project of APEC's Committee on Trade and Investment, "Supporting Marginalized Women Exporters".

Ms Gibb's recent publications include *Gender Dimensions of Intellectual Property and Traditional Medicinal Knowledge* (UNDP Regional Centre in Colombo, 2007), *Farmworkers from Afar: Results from an International Study of Seasonal Farmworkers from Mexico and the Caribbean Working on Ontario Farms* (The North-South Institute, 2006), *Gender Integration in APEC: A Retrospective*, in *Gender and Trade: A Policy Research Dialogue on Mainstreaming Gender into Trade Policies* (Status of Women Canada, 2006), and *Engendering Labour Mobility Agreements: A Case Study of Labour Mobility in Trade Agreements*, with Chantal Blouin, Maire MacAdams and Ann Weston (Status of Women Canada, 2004).

Ms Gibb received her education from McGill University and the University of British Columbia, and is a member of the International Working Group on Gender, Macroeconomics and International Economics (GEM-IWG).

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What is Gender and Gender Analysis?

APEC Workshop
May 2008

From Women in Development to Gender Relations

1960's

- o Development planners and policy makers did not consider the impacts of programs or policies on women
- o Assumptions were made about the role of women (“homemakers”)
- o Women’s work—inside the home and outside was virtually “invisible”

“Women in Development” (WID) (1970s)

- o WID focussed on “women”
- o Supported separate women’s programs
- o Recognized that women have different needs and experiences
- o Emphasized: “Ask the women what they want”

Women in Development 1980’s

- o Resources were allocated to specific groups of women (income generating projects, scholarships, etc.)
- o Programs had limited impact on improving the lives of the majority of women
- o Focus on “women” implied that women were “the problem”

Gender and Development (GAD) early 1990's

- o Recognized that women could not be looked at separately from men.
- o Put “men” in the picture
- o Focussed on relations between men and women in a particular society or context

Gender and Development

- o Recognized that:
- o “Sex” is a biological category
- o “Gender” is a social category

Gender arises from the socialization process and consists of particular notions of Masculinity & Femininity

Socialization Process

Involves assumptions and expectations about appropriate:

- Behaviours
- Characteristics
- Capabilities and aptitudes

for boys & girls, men & women

These ideas change over time.

These Assumptions lead to :

- Different opportunities for women and men
- Different access to resources and benefits in the family and in society
- Different values being placed on males and females.

Gender Operates at Two Levels

Ideas + Behaviour
(Ideology) (Practices)

e.g., Idea is that men are the primary breadwinners for the family
Associated behaviors include decision to lay off women first from formal employment

Gender Analysis

- o Looks at relations BETWEEN different groups of men and women in a particular society
- o Examines other relations based on
 - o Age
 - o Ethnicity
 - o Race
 - o Religion
 - o Class, etc.

Gender Analysis examines...

- o Access to and Control over Resources & Benefits
- o Participation in Decision-Making
 - o Household, Community & Wider Society
- o Power relations between different categories of women and men
- o Factors that influence change over time

Gender Analysis Examines:

- o Who does what (the division of labour by sex)
 - Paid work (productive)
 - Household (reproductive)
 - Community
- o The value society places on different kinds of labor

Why Gender?

- Equity and equality are fairly universal values within APEC economy and these principles enshrined in economy constitutions.
- Governments of most APEC economies have made international commitments to:
 - CEDAW
 - Beijing Platform for Action
 - MDGs

Increased Development Effectiveness & Efficiency

- Strong link between achievement of all the MDGs and increased gender equality, not just MDG 3.
- Increased gender equality actively promotes sustainable development, e.g, education, health.
- Inequality can act as a constraint on economic growth, e.g., high fertility rates, low literacy rates

Increased Competitiveness

- Studies have shown that economies which achieve increased gender equality in the private sector are more productive.
- For example, a recent study showed that companies with more gender-balanced boards of directors 35% more profitable than those with male-dominated boards.
- Why? Because are able to tap different markets and benefit from having diverse perspectives on the boards.

Gender Analysis shows that:

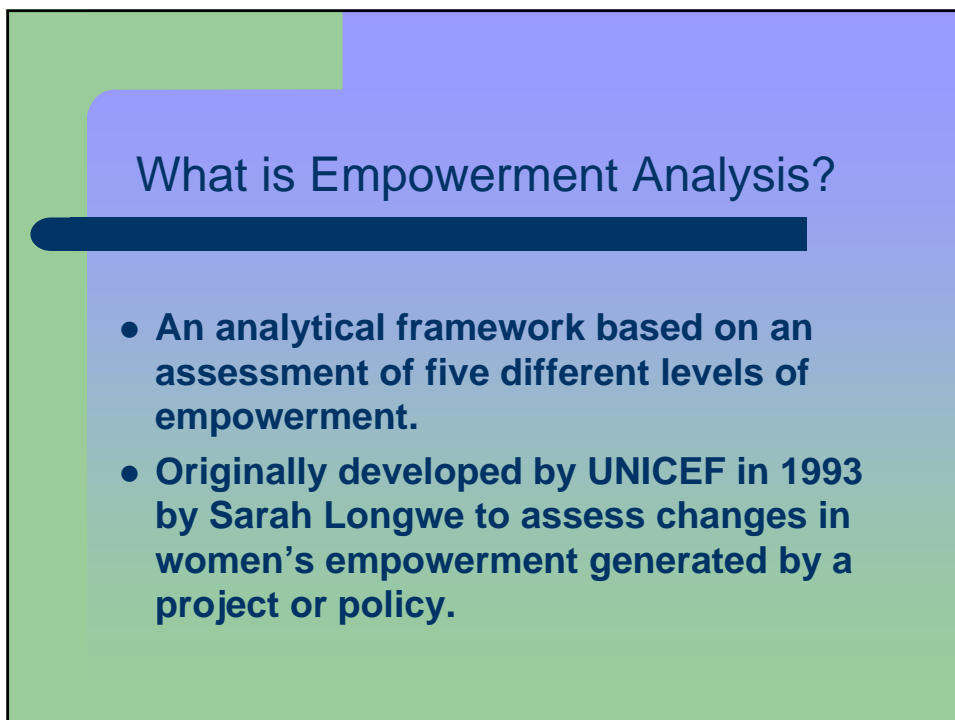
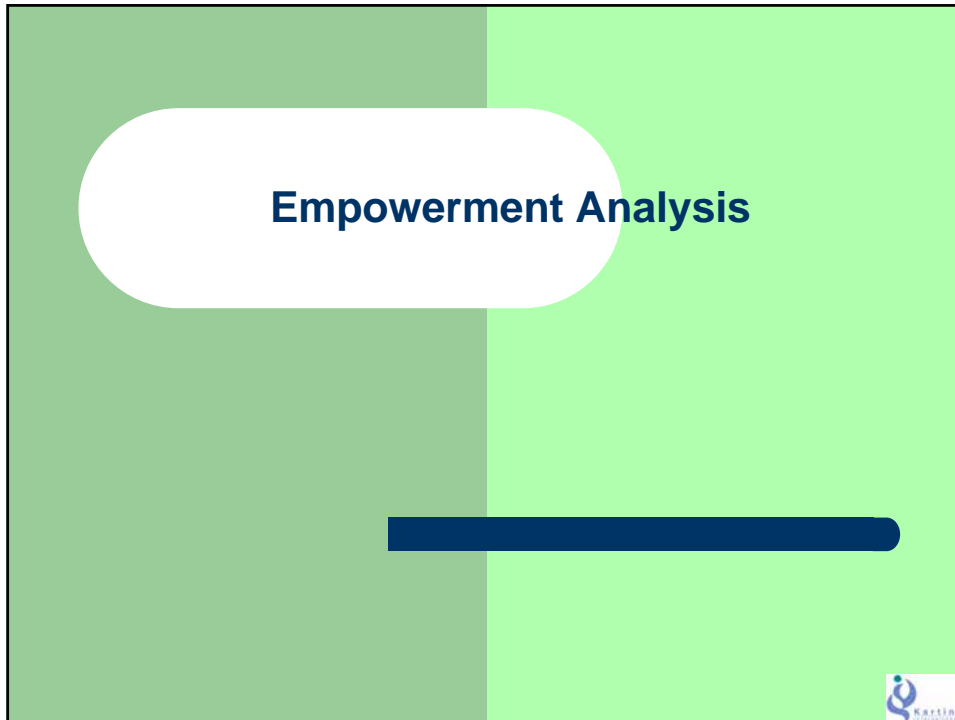
- Women strongly influence or make 70% of consumer decisions to purchase cars (Chrysler - Daimler study). For real estate purchases, this figure rises as high as 85%.
- In APEC region, 35% of SMEs owned or managed by women.
- Women's SMEs often have different growth and management characteristics than those owned or operated by men.

Gender Analysis shows that Women's SMEs:

- Have a strong commitment to their local community, particularly in terms of sourcing and employment.
- Perceive themselves to be at the centre of their business organization with teams and working groups emanating from that central position, rather than developing rigid hierarchical structures in which they are positioned at the top.
- Have a strong commitment to a vision, that encompasses their private and business lives. This means that they constantly strive to develop sustainable business with manageable growth rather than aiming for immediate high growth and overtrading.

Gender Analysis shows that Women's SMEs:

- Focus upon the personal relationship aspects of business contacts, which supports long-term ambitions, (which include high turnover and profitability).
- Develop contacts through active networking, which they perceive as a rich business resource.
- Grow their business through a range of relationship alliances that frequently enable the creation of more businesses and trade.



Definition of Empowerment

- Any process which gives specific groups of men and women greater control and power over the different aspects of their lives.
- The underlying premise of the framework is that specific groups of women and men experience unequal power relations that often lead to their subordination and a lower socio-economic status.

Levels of Empowerment

- Welfare
- Access
- Critical awareness
- Participation
- Control and ownership

You can use Empowerment Analysis to analyze where:

- There are significant gender and power gaps in the project's planned impact
- Gender or power imbalances will be created or maintained by a policy, program or project
- There may be a need for additional measures to redress these imbalances.

You can use Empowerment Analysis to:

- Determine the optimum inputs needed to generate increased empowerment for specific groups of women and men
- Monitor program progress from a gender equality and empowerment perspective

Welfare Level

- Includes any actions which increase women's and men's material welfare (e.g., basic needs such as nutritional status, health, housing, physical security, clean water, etc.).
- Without basic material security at a survival level, it is difficult for women and men to move onto any other level of empowerment.
- e.g., Women who experience on-going domestic violence generally lack the confidence to participate as community leaders or to speak up in a public forum.

Access Level

- Refers to changes that give women and men more access to the resources they need to function effectively in each of the main three sphere of work (i.e., productive, reproductive and community).
- This can include resources such as land, credit, labour, service, time, political influence, etc.
- Empowerment at this level focuses on increasing women and men's equality of access and opportunities related to these resources.

Access Level

- **Critical first steps include:**
 - making people aware of the difference between the conditions of women and men in the different spheres of work
 - encouraging them to take action to ensure that both women and men gain equitable access to their share of the available resources.
- e.g., scheduling training on community-based conflict resolution at times when both women and men can attend.

Critical Awareness Level

- Actions to increase women and men's awareness of the different kinds of discrimination they face in obtaining equal access to or control over resources
- To do this, both women and men must first become aware that this discrimination exists and begin to understand the nature of the discrimination and its underlying causes.
- It requires rejecting the almost universal belief that women's lower socio-economic status is part of the natural order and that women have less value than men.

At the Critical Awareness Level

- Related actions encourage people to analyze their society and systems critically, to recognize discriminatory practices for what they are and not as something which is either acceptable or permanent.
- Involves developing a belief in equality between women and men as a basic human right.
- Focuses on advocacy and support for strategic change.

Participation Level

- Gender gaps in men and women's participation in decision-making (both formal and informal) at all levels are easily quantified
- Related actions need to explicitly ensure that women and specific groups of disadvantage men represented in the needs assessment, problem identification, and policy/project planning processes, as well as in program management, implementation and evaluation
- e.g., Ensuring that both women and men from different stakeholder groups are represented in trade policy dialogues.

Control and Ownership Level

- Gender gaps at this level are due to an imbalance between male and female ownership of the means of production and control over the decisions regarding their allocation and use.
- To change these power relations, there needs to be an increase in the participation of women in decision-making and in their ownership of land, capital, tools, technology and knowledge.
- e.g., Developing programs that confirm women's land and inheritance rights.

All Empowerment Levels Are Inter-related:

- What occurs at one level potentially has an impact on the other empowerment levels.
- e.g., Increasing women's participation in decision-making, can make both male and female program participants more aware of women's ability and right and increase their critical awareness of women's leadership capacity.
- Thus if your assessment only shows increased empowerment at one level, your program or policy may need to include additional strategies to increase empowerment at the other levels.

Empowerment in terms of rights:

Legal System:

Any measures that lead to the strengthened promotion and protection of the human rights of women, and girls in the law and the action of police, prosecutors, judges & courts). [*welfare, access & critical awareness*]

Public Awareness:

Any measures that lead to increased knowledge about and recognition by the general public and decision makers of the human rights of women and girls. [*critical awareness*]

Changes in Rights

- **Response to gender-specific rights:**

Any measures leading to improved services and mechanisms that respond to gender-specific constraints on rights or to rights violations

- e.g., Domestic violence, trafficking, gender-based violence in conflict zones) [*welfare, critical awareness, access*]

Changes in Participation

Capacity for Public Participation:

Any measures that lead to increased capacity of women & men's organizations for advocacy and for participation in public life and decision making. [*critical awareness, participation and control and ownership*]

Representation among decision makers:

Any measures that lead to increased representation of women in democratic processes and in decision making positions in partner institutions and communities, and in target sectors. [*critical awareness, participation and control and ownership*]

Changes in Participation

Household & individual decision making:

Any measures that lead to more equal power relations between women and men at the household level as well as the increased decision making capacity of individual women and marginalized men.

[*critical awareness, participation*]

Gender and Trade

Tools to Measure
Tools to Integrate

Research and Measuring the Impact of Trade Policy

- Impact Assessments
- Gender and Value Chain Analysis
- Checklists, Forcefield Analysis, PEST and SWOT

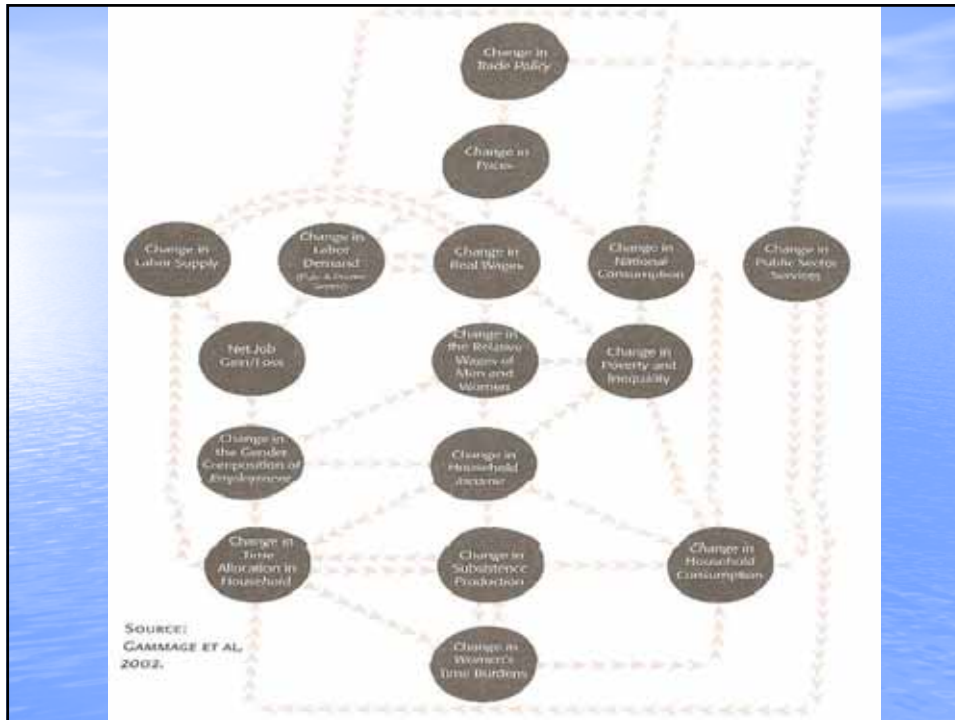
Impact Assessments

- Trade Impact Reviews
- Sustainability Impact Assessments
- UN Gender and Trade Impact Assessments
- Poverty and Social Impact Assessments
- Trade Policy Review Mechanism

Trade Impact Review

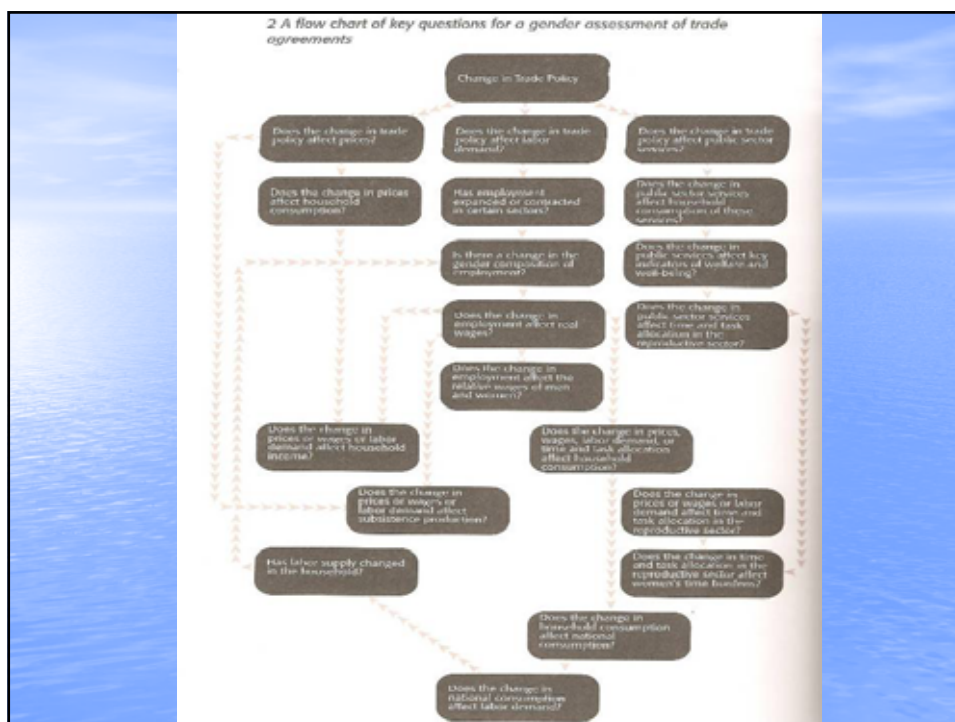
A Tool to Analyse the impact on women of a change in policy for a commodity

The first diagram illustrates links between changes



Trade Impact Review

The second diagram is a flow chart of questions that can be used to carry out a gender assessment of trade agreements



Gender Indicators

- Women's organizations have developed gender indicators for such assessments
- Please visit:

<http://www.wide-network.org>

Specifically: <http://www.wide-network.org/index.jsp?id=231>

Sustainability Impact Assessments

- Members of the EU have undertaken
 - Scheduled under Cotonou, and RTA between EU and ACP countries
- Impacts at macro- meso- and micro-levels
- Gender has been integrated, albeit marginally

UN Gender and Trade Impact Assessments

UN Task Force on Gender and Trade

Distinct from SIAs: Focus on the development of gender-aware assessment and modelling techniques for assessing the *ex ante* and *ex post* impacts of trade agreement provisions

Concerns around the sexual division of labour, labour market segmentation/discrimination, asymmetric rights and responsibilities, reproduction and motherhood, gendered social norms, time poverty and political, economic and social rights

Poverty and Social Impact Assessments

- Intended and unintended impacts
- Sequencing and Pace of implementation
- Complementary Measures

Case Study:

PSIA in Export Promotion
Strategies in Uganda

Trade Policy Review Mechanism

- Possible Entry Point for including gender analysis in the Trade Policy Review Process
- TPRs could deal with effects on women's employment patterns and income
- Main purpose is compliance with agreements and rules, therefore not necessarily the best entry point

Gender and Global Value Chain Analysis

Analytical framework for industries that span the globe

Maps out the inputs and outputs and the flows of knowledge and expertise

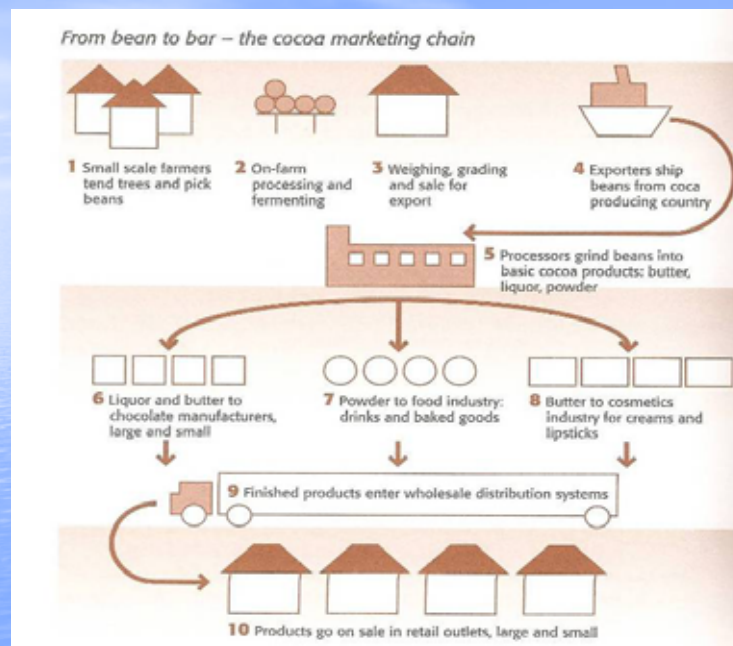
Shows how value is created at different stages by different activities

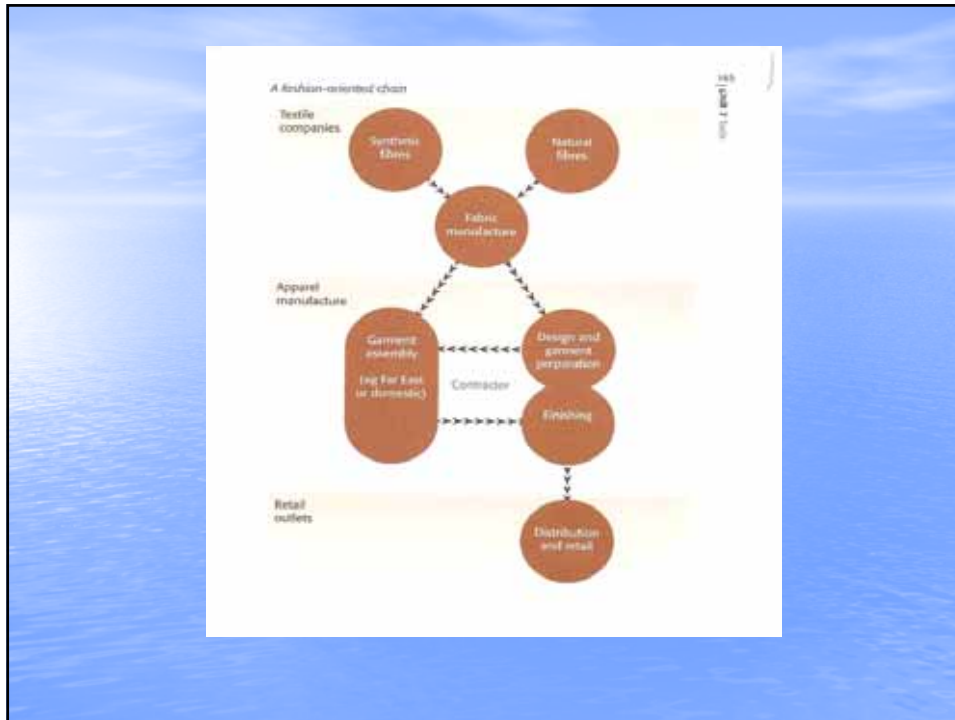
GVCA

Looks at the people along the chain (men and women workers, designers, suppliers, producers, domestic traders, exporters, buyers, distributors) and how they benefit or don't benefit from participating

Looks at who is in control (sometimes a lead firm, sometimes a network of firms) of the distribution of those benefits and how those who have the least bargaining power and poorest pay, can "move upwards"

Pinpoints specific blockages related to production, trade, market access





Adding Gender analysis to value chain analysis

1) Basic Information:

Demographic data, labour force data, roles in household and community

2) Context

Comparative info: demographic and labour force data for country as a whole, for the industry in *other* producing countries, women's and men's roles in the industry, household and community

3) Enterprise Assessment

Rules: how things get done; activities: what gets done; resources: what is used, what is produced; institutional patterns: who is in, who is out; power: who determines priorities and makes the rules

Questions to ask

What is the burden of work for women and men in this segment of the industry?

Do women and men have the resources required? 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 fro women and men in this segment of the industry?

GVCA

What are the prospects for advancement of women and men in this segment of the industry?

To what extent do men and women determine the priorities and/or make the rules in 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?

Case Studies: Value chains in Africa

- Cashew Nuts in Mozambique
- Shea Nut Butter in West Africa

Checklists, Forcefield Analysis, PEST and SWOT: Influencing

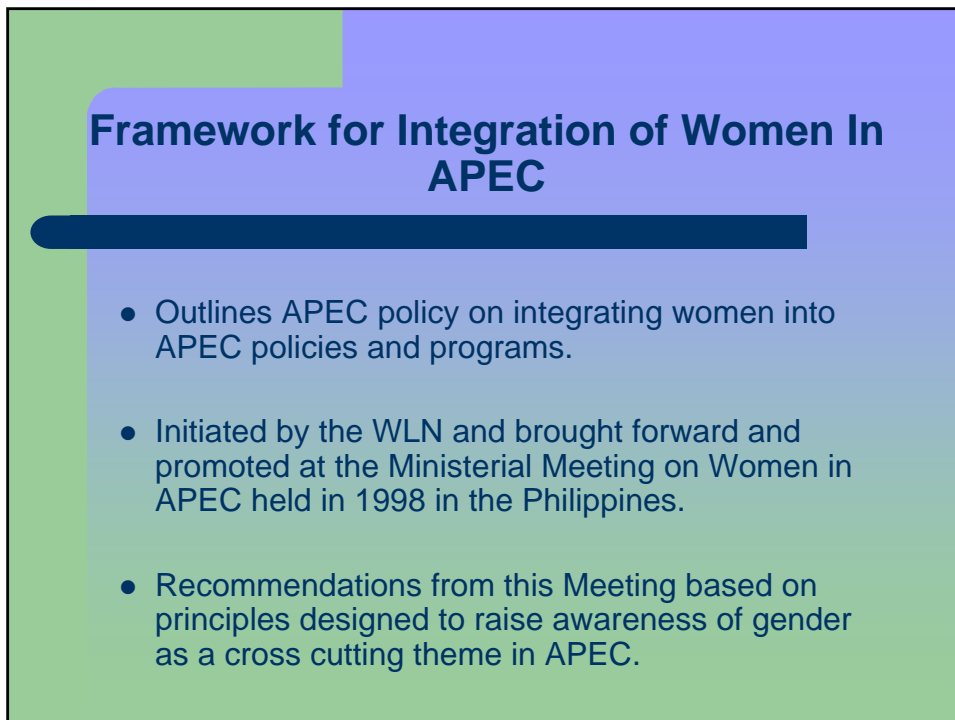
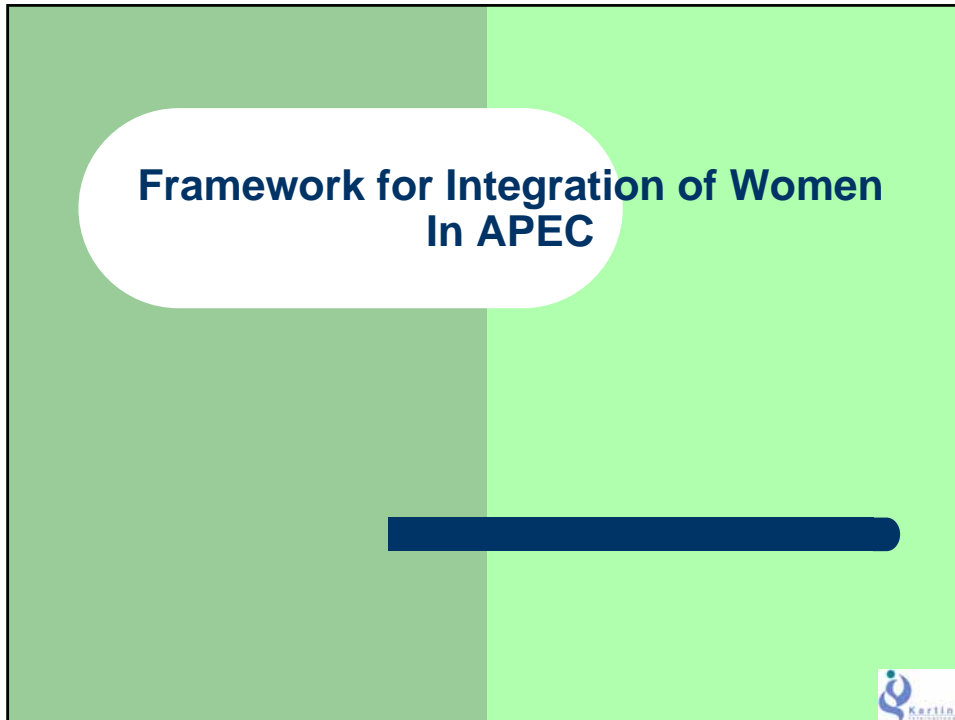
- Checklist for Officials
- Checklist for Trade Negotiators
- Forcefield Analysis: Support or Opposition to gender analysis in trade negotiations
- PEST: External Factors
- SWOT: Internal Factors

Gender and Trade Success Stories: International

- Kuapa Kokoo in Ghana
- Women Workers in Export Horticulture in South Africa
- Women in Tourism and Handicrafts in Vietnam

Gender and Trade Success Stories: National

- Cambodia's Ministry of Women's Affairs
- Gender Budgeting in South Africa
- Multi-stakeholder mechanisms in Kenya and Uganda
- UK Gender expert Group on trade



Women's 1998 Ministerial also noted:

- The major implications for women of the interconnectedness of APEC activities, including trade and investment liberalization and facilitation (TILF) and economic and technical cooperation (ECOTECH)
- Women's critical role in the attainment of sustainable economic development
- Women's unpaid work as a major contributor to the economy

Women's 1998 Ministerial also noted:

- Close relationship between other APEC fora and concerns affecting women in micro enterprises, SMEs, science and technology, HRD, finance, fisheries, tourism, transportation, telecommunications and other sectors
- Concerns and perspectives of women in the formulation and implementation of policies, programs and projects
- The empowerment and capacity building of women to respond to economic opportunity and challenges and the barriers that prevent their full participation within the economy.

1998 Women's Ministerial Results

- Ministers endorsed development of the *Framework for the Integration of Women in APEC*.
- Recommended that Senior Officials establish an ad hoc Task Force to develop the Framework.
- In 1999 the SOM Ad-Hoc Advisory Group on Gender Integration (AGGI) was formed to develop and help implement the Framework.

The Framework

- Developed to be practical and systematic approach to direct APEC in achieving integration of women in the mainstream of APEC processes and activities.
- Comprised of three inter-related elements:
 - Gender analysis
 - Collection and use of sex-disaggregated data.
 - Involvement of women in APEC: the increased participation of women in APEC fora.

The Framework

- Was accompanied by training for APEC officials and practical guides to support these three activities, including how to integrate gender into project proposals.
- Supposed to lead to:
 - increased awareness that human capital worth of women is directly linked to creating a “leading-edge workforce” that will be able to respond to economic opportunities generated by trade and investment liberalization and facilitation.
 - increase prosperity among APEC members, and enhance effectiveness of APEC policies and activities in APEC economies, thereby improving their overall “social and economic well-being”.

GFPN

- In 2002, the Framework mandate expired.
- Ministers at the 2002 Ministerial Meeting in Mexico reaffirmed their commitment to integrate gender into APEC processes and activities by endorsing the establishment of the Gender Focal Points Network (GFPN).
- GFPN developed as mechanism to promote issues that supported gender equality and incorporating gender issues and considerations into APEC activities.

GFPN to achieve this by:

1. Advancing the full and equal participation of women and men through policy advice on gender issues to APEC fora.
2. Assisting APEC fora to identify and address gender issues within their work.
3. Promoting and reporting on women's representation across APEC and within individual fora.
4. Assessing and reporting on the use of gender criteria in project proposals.

GFPN to achieve this by:

1. Collecting and sharing good practices in gender integration within individual fora and across APEC economies.
2. Facilitating provision of expert advice on gender.
3. Assisting in developing project proposals.
4. Proposing recommendations on advancing gender integration in APEC .

Gender Analysis: Practical Needs & Strategic Interests

Practical Needs Are:

- Immediate and short term needs that focus on basic needs (food, shelter, security, etc.)
- Unique to particular groups of women and men
- Easily identifiable
- Focus on improving living conditions, but do not actively work to alter traditional gender roles and relationships
- Same as welfare level of empowerment.

Strategic Interests :

- **Contribute to long term structural change that foster increased gender equality**
- **Are common to all women and to specific groups of marginalized men**
- **Relate to women and men's disadvantaged position, their subordination to other groups, their lack of resources and education, their vulnerability and poverty and the impact of violence on their lives**

Strategic Interests Relate to Women's:

- **Disadvantaged position**
- **Subordination to other groups**
- **Relative lack of resources and education**
- **Vulnerability and poverty**
- **The impact of violence on women's lives**

Strategic Interests :

- ❑ Analyze the root causes of these disadvantages which are not always easily identifiable by the groups concerned
- ❑ Are addressed through discussions and analysis, the promotion and strengthening of civil society organizations that target the issues in question and by lobbying for legal and policy changes (similar to critical awareness level of empowerment)
- ❑ Involve women and men as key agents of change and actively seeks ways to enable them to become change agents

Strategic Interests :

- ❑ Can improve women's position and status
- ❑ Can lead to a change in women and men's positions relative to each other, as well as in their respective gender roles
- ❑ Can empower women and men to transform their relationships with each other
- ❑ Are addressed through discussions and analysis, the promotion and strengthening of civil society organizations that target the issues in question and by lobbying for legal and policy changes

Summary of Differences :

- **Addressing practical needs will improve the lives of women (and/or men) in the short-term**

- **Addressing strategic interests improves the relation between different categories of women and men and is a longer term process**

APEC and Other Gender Analysis Frameworks



Gender Analysis



- Is about asking better questions.
- Many different models of gender analysis.
- This presentation reviews three:
 - APEC Gender Guidelines
 - Access and Control Framework
 - Practical Needs and Strategic Interests

Access & Control Framework



- Is based on an economic efficiency model developed by the Harvard School of Business
- Examines the value society places on the different kinds of labour done by men and women
- Assumes that the division of labour by sex is dynamic and can change over time.

APEC Gender Framework and Checklist



The APEC Gender Framework:

- Is project -focused
- Asks a series of questions using a checklist format
- Focuses on project impact on women.

Access & Control Framework



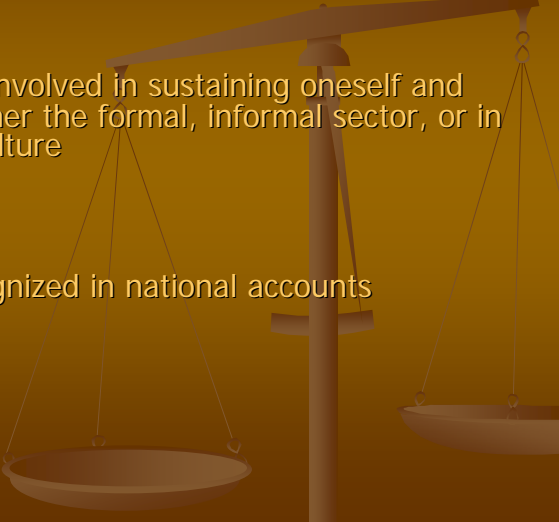
- Has 3 main categories of analysis:
 - Differences in women & men's access to and control over the resources they need to sustain themselves
 - Division of labour between men & women
 - Different factors influencing these differences

The Framework :



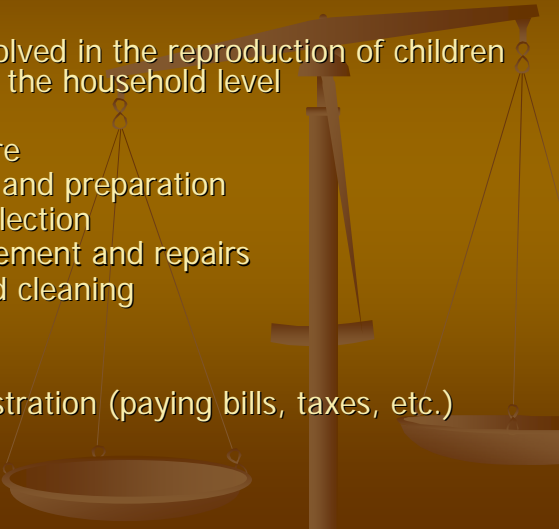
- Examines who does what (the division of labour by sex)
 - Paid work (productive)
 - Household (reproductive)
 - Community (social/political)
- Assesses the value assigned to different types of work done by women and men.

Productive Labour is:

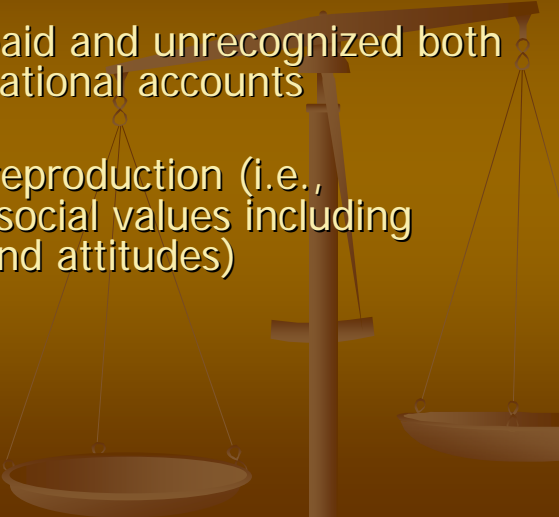
- Any kind of work involved in sustaining oneself and one's family in either the formal, informal sector, or in subsistence agriculture
 - Generally paid
 - Counted and recognized in national accounts
- 

Reproductive Labour :

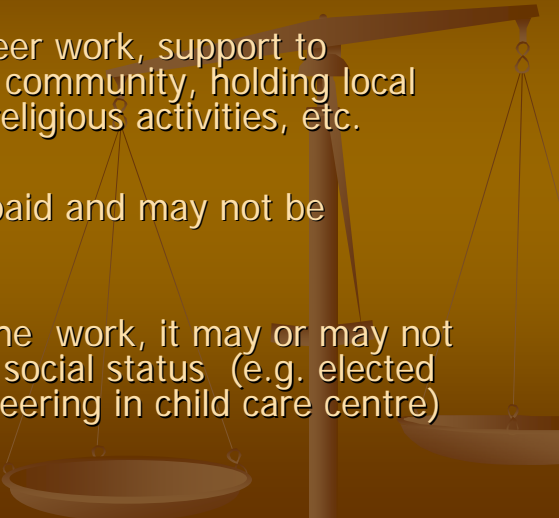
Any type of work involved in the reproduction of children or the labour force at the household level

- Child and elder care
 - Food preservation and preparation
 - Fuel and water collection
 - Household management and repairs
 - Clothing repair and cleaning
 - Cleaning
 - Waste disposal
 - Household administration (paying bills, taxes, etc.)
- 

Reproductive Labour:

- Is generally unpaid and unrecognized both socially and in national accounts
 - Includes social reproduction (i.e., transmission of social values including gender values and attitudes)
- 

Community labour

- Includes volunteer work, support to neighbours and community, holding local political office, religious activities, etc.
 - Is generally unpaid and may not be recognized.
 - Depending on the work, it may or may not confer power & social status (e.g. elected office vs. volunteering in child care centre)
- 

Community labour

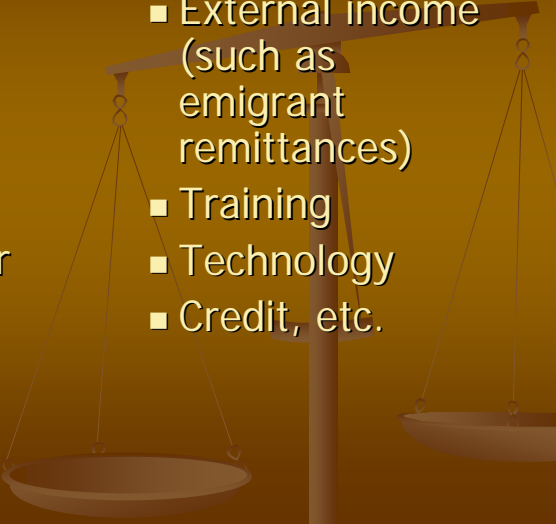
Questions to ask:

- Who does this work?
- Who has the time?
- What is the social and personal cost of this work?
- Who benefits from this work?

Access & Control Analysis

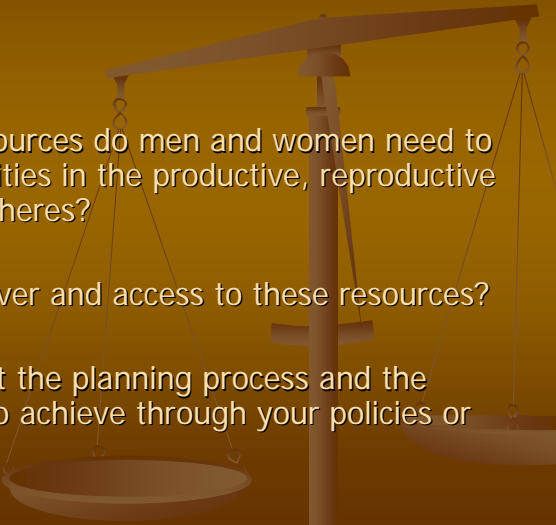
- Men and women have different access to resources and control over:
 - the means of production
 - the right to obtain services, products or commodities in the private (household) and public spheres.

Resources Include:

- Land
 - Capital
 - Time
 - Education
 - Political power
 - Networks
 - External income (such as emigrant remittances)
 - Training
 - Technology
 - Credit, etc.
- 

Access & Control

Questions to ask:

- Which specific resources do men and women need to support their activities in the productive, reproductive and community spheres?
 - Who has control over and access to these resources?
 - How this will affect the planning process and the results you need to achieve through your policies or programs?
- 

Influencing Factors

Factors that can affect the division of labour by sex and women and men's access to and control over resources include:

- Cultural beliefs regarding women and men's roles and behaviour
- Economic trends (e.g., recession, rapid economic growth)
- Politics (changes in policy)
- Religious beliefs, etc.

Access & Control Analysis Questions:

- Who are the main groups of women/ girls and men/ boys in the community/institution?
- What is the division of labour between them in areas of work concerned?
- Who makes the decisions regarding women and men's access to resources and/or controls/owns the means of production?
- Are there any significant gender gaps in women and men's access to and control over the primary resources in this community?
- How can or will your policy or program change this?

Gender Budget Processes

**APEC Gender Analysis Workshop,
Arequipa, Peru
May 15-16, 2008**

Terminology

- Gender responsive budgets
- Gender budget initiatives (GBIs)
- Gender budgeting
- Gender sensitive budgets
- Women's budgets

Terms tend to be used interchangeably.

N.B.- Gender budgets are not a separate budget for women or men.

Gender Responsive Budgeting

- Is a gender mainstreaming strategy with the government budget as the entry point.
- The National Budget is the best entry point for integrating gender into macro-economic policy because it is the policy document that reflects the highest level of political commitment and socio-economic development policies of a government.

Why Gender-Responsive Budgets?

- Are a method for governments to implement gender-related international commitments (e.g, CEDAW, *Beijing Platform for Action*).
- Monitor progress in government's commitment to gender equality by focusing attention on government outputs and the impact of government expenditure.
- Facilitate reporting on progress with the government's commitment to gender equity and equality.

Why Gender Budgets?

- Are tools to ensure there is no gap between national policy development on the advancement of women and budget appropriations.
- Prevent losses to the economy that can occur from failing to consider the gender implication of public expenditures and revenues.
- Can be instrumental for improving accountability and achieving effective policy implementation.

Why is there a need to look at both women and men's experiences in planning budgets?

- Budgets the means by which citizens' access to goods, resources and services is determined.
- Most public expenditures not specifically targeted to either men or women, but budget planning and implementation impact not gender-neutral.
- Specific taxes and allocation of public expenditures affect the lives of women and men differently because they play different economic roles, both as contributors to economic growth and recipients of benefits from public expenditure.
- e.g., government implemented budget cuts or funding increases in certain areas such as health care, child care, education and public transportation tend to disproportionately affect women.

Assumptions Made

- Budgets often set up to serve the 'public interest' and the needs of the 'average citizen'.
- From a macro-economic perspective, women typically assumed to be economic dependents rather than major contributors to the economy.
- Also need to look at intersection between gender and other diverse factors such as race, age, poverty, etc. during preliminary assessment of any policy or budget issue.

Entry Points to Budget Cycle

- Planning and formulating the budget
- Adoption or execution of the budget by parliament
- Implementing the policies and programs
- Monitoring, evaluation and audit
- Each phase involves different people, knowledge and political processes.

Line item budgeting:

- Line items record how much money each government unit will be allowed to be spend and and focuses on spending limits or budget lines.
- Public expenditures for the coming fiscal year are listed as line items.
- These budgets do not provide information on government programme objectives, efficiency or effectiveness.
- Therefore it is more difficult to integrate a GRB approach into this type of budget process.

Performance budgeting:

- Establishes a clear relationship between what the government does and how much it costs.
- Focuses more on efficiency than on effectiveness and measures performance through indicators.
- You can readily use this latter characteristic to introduce gender concerns and specific indicators to measure overall budget impact on gender equality.
- Requires that financial and other leaders understand and accept that increased gender equality has to be a core performance issue to measure as a part of national budget efficiency standards.

Programme budgeting:

- Enhances planning, output efficiency and effectiveness.
- Focuses more on the effectiveness of spending and establishes clear link between programme costs and programme results.
- Needs to have government-wide gender mainstreaming policy in place to ensure that programme objectives in all sectors will include the promotion of increased GE.
- Also need awareness of the strong link between programme effectiveness and increased gender equality among leaders and civil service officials than currently exists in many countries.

Zero-Based budgeting:

- There is no automatic annual budget allocation for set programmes. Instead, budgets are set to zero at the start of each fiscal year and each ministry has to justify its projected expenditures.
- Requires clear identification of programmes and the ranking and justification for each programme in line with objectives and goals of each department or agency.
- Higher ranked programmes are more likely to be financed than those at the bottom and often gender-related programming has low priority.

Steps Involved:

Step 1: Gather Relevant Data

- Describe the situation of women and men, girls and boys (and different subgroups, such rural/urban, age-based, etc) in the sector. Conduct environmental scan.

Step Two: Relate data to policy/program

- Assess the policy, programs, and projects proposed in terms of its gender sensitivity, i.e., whether its addresses the situation described in Step 1.

Steps Involved:

Step 3: Review Inputs

- Assess whether adequate financial (budgetary) and other resources (e.g. staff) are allocated to implement the gender sensitive policy of Step 2 effectively.

Step 4: Review Outputs

- Monitor whether expenditure allocated in Step 3 was spent as planned.

Step 5: Determine Results

Assess whether the policy, along with associated expenditure, has promoted gender equality/equity as intended, and if it has changed the situation described in Step 4.

Defining Objectives:

- Budgets are a means to achieve objectives.
- Therefore, the first task in drawing up budgets is to determine objectives and the policies that are likely to achieve those objectives.
- Budgets should follow policy, rather than vice versa.
- Main objective of engendering a national budget is to improve the analysis of the budget impact, attain more effective targeting of government expenditure and offset any undesirable gender-specific consequences of previous budgetary measures.
- Can build on action points related to gender in other commitments.

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Defining Outcomes:

- Ask who for whom the program is being developed.
- Find out what outcomes other stakeholders expect from this program/policy.
- You may wish to indicate a set number of initiatives and corrective measures that address the differential gender impacts of components of budgetary allocation.

Determining Indicators:

- Indicators are the types of results that the program wants to achieve.
- You need to use measures that are observable and/or quantifiable for each indicator.
- Need data on how women and men socially and economically placed in an economy.
- If employing a performance budget system, you can use indicators to measure the overall budget impact on gender equality

APEC economies that have undertaken gender budgeting initiatives at the national or sub-national levels :2004

- Australia
- Canada
- Chile
- Indonesia
- Malaysia
- Mexico
- Peru
- Philippines
- Thailand
- Vietnam
- United States (local govt only)