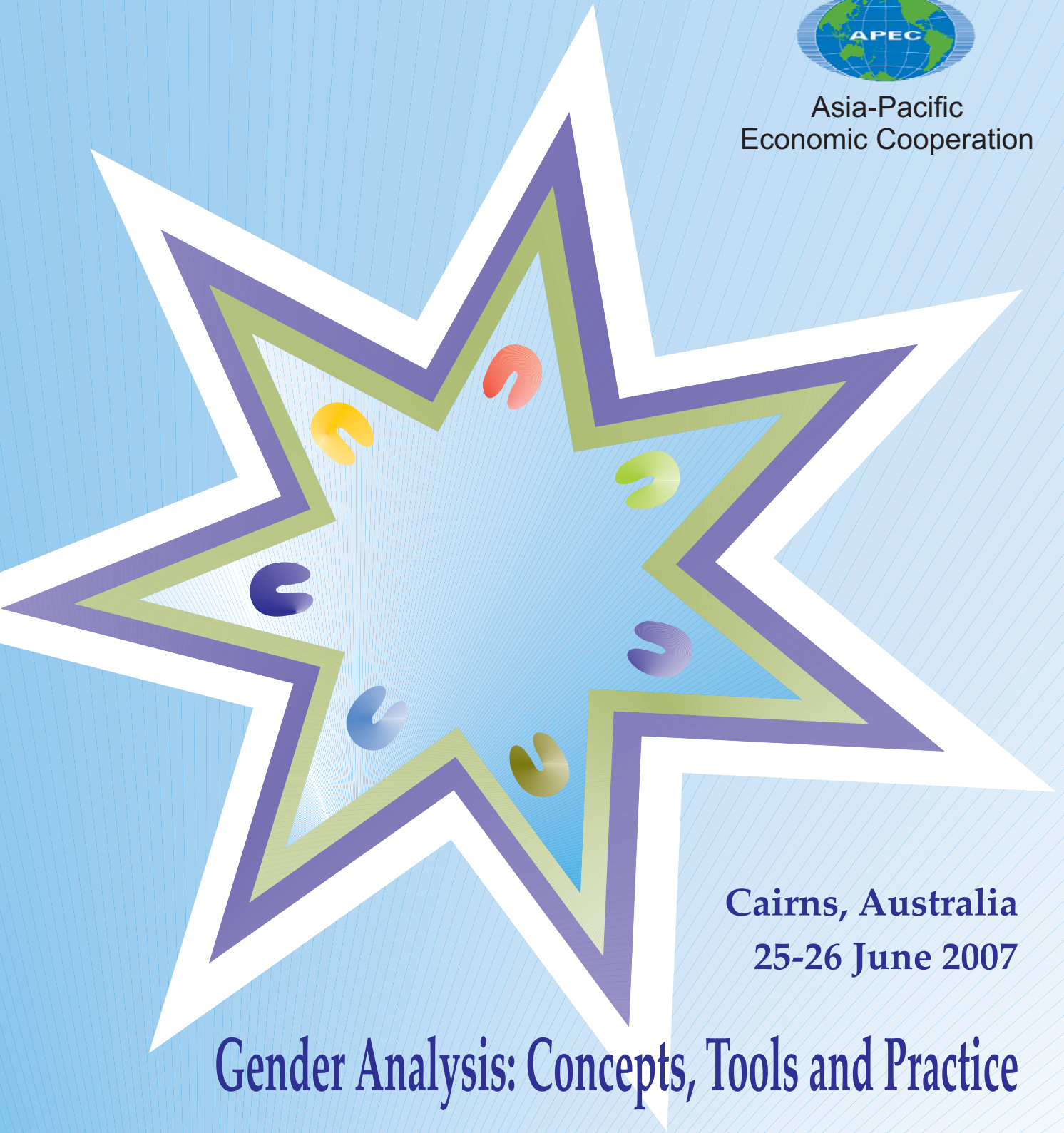




Asia-Pacific  
Economic Cooperation



Cairns, Australia  
25-26 June 2007

**Gender Analysis: Concepts, Tools and Practice**  
**Training Manual for APEC 2007**  
**Gender Focal Point Network Workshop**



**Susanne Schech**  
**Rhonda Sharp**





Asia-Pacific  
Economic Cooperation

**< Training Manual >**  
**APEC Workshop on Gender Analysis:**  
**Concepts, Tools & Practice**

**Cairns, Australia**  
**26-27 June 2007**

**APEC Gender Focal Point Network**  
**2007**

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## About the presenters

**Rhonda Sharp** is Professor of Economics at the Hawke Research Institute for Sustainable Societies at the University of South Australia. She has been a researcher and consultant on gender analysis with a particular focus on responsive budget initiatives for the governments of Australia, South Africa, Sri Lanka, Norway, the Basque Country of Spain, Barbados, Republic of the Marshall Islands, Samoa and the UK, as well UNIFEM, UNDP, the Commonwealth Secretariat, Asian Development Bank and AusAid.

**Susanne Schech** is Associate Professor in Geography and the Director of the Centre for Development Studies at Flinders University. Over the past seven years she has had a leading role in designing and conducting intensive gender training courses under the Indonesia Australia Specialised Training Project, both short courses in Indonesia, and longer courses in Australia. Gender has been integral in all of the university based topics Susanne has taught over the years in international development studies, and in 2007 she introduced a Graduate Certificate in Gender Mainstreaming and Analysis, the only such program offered in Australia.

## Acknowledgements

Dr Janette Hancock, Hawke Research Institute, University of South Australia provided valuable research assistance in developing this manual. Assistance was also provided by Paul Wallace, editor, Hawke research Institute, University of South Australia. The support of the Gender Focal Point Network (GFPN) of Asia Pacific Economic Cooperation (APEC) was important, particularly members, Professor Soon-Young Jung and Ms Hae-Young Pang, Asia Pacific Women's Information Network Centre (APWINC), Sookmyung Women's University, Republic of Korea and Ms Helen McDermott, Office for Women, Government of Australia, Australia. Ms Barbara Brougham, along with Michael Brougham, *The Write Word*, Adelaide, provided editing and design assistance.

## A glossary of gender terms

<b>sex</b>	<i>identifies the biological differences between men and women</i> Example: women can give birth, men provide sperm. Sex roles are universal.
<b>gender</b>	<i>identifies the social relations between men and women</i> It refers to the relationship between men and women, boys and girls, and how this is socially constructed. Gender roles are dynamic and change over time.
<b>gender analysis</b>	<i>the methodology for collecting and processing information about gender.</i> It provides disaggregated data by sex, and an understanding of the social construction of gender roles, how labour is divided and valued. Gender analysis is the process of analysing information in order to ensure development benefits and resources are effectively and equitably targeted to both women and men. It is also used to anticipate and avoid any negative impacts development may have on women or on gender relations. Gender analysis is conducted through a variety of tools and frameworks.
<b>gender awareness</b>	<i>an understanding that there are socially determined differences between women and men based on learned behaviour, which affect their ability to access and control resources.</i> This awareness needs to be applied through gender analysis into projects, programmes and policies.
<b>gender-disaggregated data (or sex-disaggregated-data)</b>	<i>data that show the differences between the situations of women and men, girls and boys.</i> Gender-disaggregated data are necessary for good gender analysis.
<b>gender division of labour</b>	<i>who (women or men, young or old) does what in terms of different types of work, such as productive work in factories, in offices, and on the land; reproductive work as in cooking, cleaning, and caring for family members; and community activities such as attending meetings.</i>
<b>gender equality</b>	<i>the result of the absence of discrimination on the basis of a person's sex in opportunities, in the allocation of resources or benefits, and in access to services.</i>
<b>gender equity</b>	<i>fairness and justice in the distribution and outcomes of benefits and responsibilities between women and men.</i> Women-specific programmes and policies are often required to correct existing inequalities.
<b>gender mainstreaming</b>	<i>the process of ensuring that women and men have equal access and control over resources, development benefits and decision-making, at all stages of the development process and in all government projects, programs and policy.</i>
<b>gender planning (or gender sensitive planning)</b>	<i>the process of planning development programs and projects that are gender sensitive and which take into account the impact of gender roles and gender needs of women and men in the target community or sector.</i>
<b>gender responsive budget</b>	<i>an application of gender mainstreaming in the budgetary process.</i> It means a gender-based assessment of budgets, incorporating a gender perspective at all levels of the budgetary process and restructuring revenues and expenditures in order to promote gender equality.
<b>gender roles</b>	<i>learned behaviours in a given society/community that condition which activities, tasks or responsibilities are perceived as male and female. Gender roles are changeable, and are affected by age, class, race, ethnicity, religion, and by the geographical, economic and political environment.</i> Both women and men play multiple roles in society. Women often have reproductive, productive and community managing roles. Men focus more on productive roles and community politics.
<b>gender-sensitive (or gender-responsive)</b>	<i>addressing the different situations, roles, needs, and interests of women, men, girls, and boys.</i>



<b>productive roles</b>	<i>activities carried out by men and women in order to produce goods and services for sale, exchange, or to meet the subsistence needs of the family. For example, in agriculture, productive activities include planting, weeding, animal husbandry.</i>
<b>reproductive roles</b>	<i>activities needed to ensure the reproduction of the society's labour force. This includes child bearing, child rearing, care for family members such as elderly, children, and workers. These tasks are unpaid and mostly done by women.</i>
<b>community managing roles</b>	<i>activities undertaken at the community level to ensure the provision and maintenance of scarce resources such as water, health care and education. This work is usually unpaid and is mostly done by women.</i>
<b>community politics roles</b>	<i>activities at the community level, organising at the formal political level, often within the framework of national politics. This work is usually done by men, and is either paid directly (money) or indirectly (increased power and status).</i>
<b>triple burden</b>	<i>refers to the fact that women tend to work longer and more fragmented days than men as they are usually involved in three different gender roles reproductive, productive and community work.</i>

## **SOURCES**

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Introductory Gender Analysis and Gender Planning Training Module for UNDP Staff

<http://www.undp.org/gender/docs/GenderAnalysisTrainModule.pdf>

World Health Organisation (2001) Transforming health systems: gender rights in reproductive health. WHO, Geneva.

Council of Europe (2005) Gender budgeting: Final report of the Group of specialists on gender budgeting (EG-S-GB), Directorate General of Human Rights Strasbourg.



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## **Introduction**

## **‘Gender: A cross-cutting theme in APEC’**

### **The framework for the integration of women in APEC**

#### **1998 MINISTERIAL MEETING ON WOMEN IN ECONOMIC DEVELOPMENT AND COOPERATION IN APEC**

The first Ministerial Meeting on Women in APEC was held in 1998 in Manila, Philippines. The purpose of the meeting was to question and assess the integration of women in the economic development of APEC activities and practices with the understanding that women played a ‘crucial role’ as participants and decision-makers in the economic advancement and progress of the APEC region. Acknowledging the importance of integrating women into the ‘mainstream of APEC activities’, several Ministerial recommendations were made based on a series of principles designed to raise awareness of:

- gender as a cross cutting theme in APEC
- the interconnectedness of APEC activities, including trade and investment liberalisation and facilitation (TILF) and economic and technical cooperation (ECOTECH), that have major implications for women
- women’s critical role in the attainment of sustainable economic development
- women’s unpaid work as a major contributor to the economy
- the close relationship between other APEC fora and the concerns affecting women in micro, small and medium enterprises, science and technology, human resources development, finance, fisheries, tourism, transportation, telecommunications and other sectors
- the 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.

To hasten the progress of integrating women into the mainstream of APEC activities and reinforcing the importance of women’s role in economic development, Ministers endorsed the development of the *Framework for the Integration of Women in APEC* and 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 FOR THE INTEGRATION OF WOMEN IN APEC AT A GLANCE**

The *Framework* is seen as a ‘practical and systematic approach’ to direct APEC in achieving the integration of women in the ‘mainstream of APEC processes and activities’. It is comprised of three inter-related elements that include:

- **gender analysis** – a methodology for examining the differences in women’s and men’s lives
- **collection and use of sex-disaggregated data** – data classified by sex and presented separately for women and men
- **involvement of women in APEC** – the increased participation of women in APEC fora.

Practical guides for gender analysis, the collection and use of sex-disaggregated data and the involvement of women in APEC have additionally been developed as ‘tools to complement the *Framework*’ and assist with its implementation.

### **IMPACT AND OUTCOMES**

Identifying the human capital worth of women was thus directly linked to creating a ‘leading-edge workforce’ that would successfully respond to multifarious economic opportunities facilitated by trade and investment liberalisation and facilitation. It was noted that successful implementation of the *Framework* would increase prosperity among APEC members and enhance the effectiveness of APEC policies and activities in APEC economies, thereby improving their overall ‘social and economic well-being’.

### **GENDER FOCAL POINT NETWORK**

In 2002 the mandate for the *Framework* expired. Ministers at the 2002 Ministerial Meeting in Los Cabos, Mexico reaffirmed their ‘commitment to integrate gender into APEC processes and activities’ by endorsing the establishment of the Gender Focal Points Network (GFPN). Aimed at providing a mechanism for incorporating gender issues and considerations into APEC activities, the GFPN was developed to promote issues that supported gender equality. It was to achieve this by:

- advancing the full and equal participation of women and men through policy advice on gender issues to APEC fora
- assisting APEC fora to identify and address gender issues within their work;
- promoting and reporting on women’s representation across APEC and within individual fora
- assessing and reporting on the use of gender criteria in project proposals;
- collecting and sharing good practices in gender integration within individual fora and across APEC economies
- facilitating the provision of expert advice on gender
- assisting in developing project proposals
- proposing recommendations on advancing gender integration in APEC.

One of GFPN’s many achievements since its inception included the 2006 APEC Workshop on Gender Analysis Training held in Da Nang, Viet Nam, which provided training to APEC officials on how to use gender analysis as a tool for applying the *Framework* to APEC policies, project designs, implementation, monitoring and evaluation.

### **SOURCES**

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1998 APEC Ministerial Meeting on Women, October 15-16 Makati, Philippines, Joint Ministerial Statement. Accessed 14 May 2007

[www.apec.org/content/apec/ministerial\\_statements/sectoral\\_ministerial/women/1998\\_women.html](http://www.apec.org/content/apec/ministerial_statements/sectoral_ministerial/women/1998_women.html)

2002 14th APEC Ministerial Meeting, 23-24 October Los Cabos, Mexico, Joint Statement. Accessed 14 May 2007 [www.apec.org/apec/ministerial\\_statements/annual\\_ministerial/2002\\_14th\\_apec\\_ministerial.htm](http://www.apec.org/apec/ministerial_statements/annual_ministerial/2002_14th_apec_ministerial.htm)

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## **Introductory Exercise**

### **Experiences of 'doing gender'**

#### **Objectives**

- to foster a positive training environment and create a space where participants can air their fears and difficulties about addressing gender issues
- to identify early in the training workshop possible problems or issues that need to be tackled.

#### **Explanation**

Senior officials may have previous experience of working with gender, sometimes positive and sometimes negative experiences. Imagine that this workshop is like moving house: you will leave behind any negative feelings you have about dealing with gender issues and bring all useful positive ideas to your new house. This exercise will help participants and trainers get an understanding of previous experiences of working with gender.

#### **Materials**

A new and/or colourful basket. An old, worn out, 'rubbish' basket, Whiteboard, Whiteboard Markers, Paper (A5 sheets)

#### **Time**

45 minutes

#### **Instructions**

- 1 Each participant writes one thing they bring into the workshop (a positive feeling or skills they have about tackling gender issues) on one piece of paper, and one thing they leave behind (a negative feeling or worry they have about tackling gender issues) on the second piece of paper. (5 mins)
- 2 Form a circle. Some participants volunteer to share their negative feelings. Then participants put their negative feelings in the rubbish basket.
- 3 All participants share the contents of the positive paper with the group explaining what it is and why they feel that way. Participants then puts their paper with positive feelings and/or skills in the positive basket to take with them to their 'new home or workplace'.

#### **Source**

Exercise adapted from the *Oxfam Gender Training Manual*, Oxfam, Oxford, 1994.

## **MODULE 1**

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### **Gender concepts: Equity, equality and capability**

At the completion of the module participants will have:

- an increased awareness of cultural norms around gender, including their own
- an increased knowledge of gender concepts.

#### **TERMINOLOGY: GENDER EQUALITY AND GENDER EQUITY**

Gender equality, equality between men and women, entails the concept that all human beings, both men and women, are free to develop their personal abilities and make choices without the limitations set by stereotypes, rigid gender roles and prejudices.

Gender equality means that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally. It does not mean that women and men have to become the same, but that their rights, responsibilities and opportunities will not depend on whether they are born male or female.

Gender equity means fairness of treatment for women and men, according to their respective needs. This may include equal treatment or treatment that is different but which is considered equivalent in terms of rights, benefits, obligations and opportunities.

**Note:** Also see glossary of terms at the beginning of the manual.

#### **SOURCE**

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*ABC of women worker's rights and gender equality*, ILO, Geneva, 2000, p.48.

## **Exercise 1.1: Shoulds and Shouldn'ts: Norms of behaviour for men and women**

### **Objective**

- to explore participants' own cultural map of gender.

### **Explanation**

Most communities and societies have 'rules' or 'norms' of behaviour which are taken for granted and implicit. Usually these 'norms' are passed on to the children from their earliest years within the family group and consolidated in the years of formal education. In this exercise you are asked to compile a collective list of the norms of behaviour for gender in your society/community.

### **Materials**

1 sheet of butcher's paper per group; 1 whiteboard pen per group; clip board per group if available, otherwise, sticky tape to pin the papers on the wall.

### **Time**

45 minutes

### **Instructions**

- 1 Participants divide into single-sex groups of 3 or 4 to complete the chart below on a sheet of butcher's paper.
- 2 The task is to construct a list of acceptable and unacceptable behaviours, activities and actions for men/boys and women/girls.
  - Each group only deals with the opposite sex.
  - Each group puts up their chart and explains how they arrived at their list.
- 3 Is it a consensus list?
- 4 Did the group leave out items group members agree /disagree on?

### **Plenary discussion**

- 1 What are the similarities and differences between the charts?
- 2 How do these norms impact on gender equality?
- 3 If participants could nominate one norm that they could change, which one would it be?



### Male groups

Women/girls should	Women/girls shouldn't
1.	
2.	
3.	
4.	
5.	
6.	
etc.	

### Female groups

Men/boys should	Men/boys shouldn't
1.	
2.	
3.	
4.	
5.	
6.	
etc.	

**Source**

The Oxfam Gender Training Manual © Oxfam UK and Ireland 1994

## Equality, Equity & Capabilities\*

APEC SOM Gender Analysis Workshop  
Cairns 26-27 June 2007

**Associate Professor Susanne Schech**  
Director, Centre for Development Studies  
Flinders University

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## Equality

- Gender equality means that
  - the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally.
  - a person's rights, responsibilities and opportunities will not depend on whether they are born male or female.

It does not mean that women and men have to become the same.

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## Sameness

- Equality implies sameness:
    - Equality of resources
    - Equality of opportunity
    - Equality of access
    - Equality of recognition
- Eg 1: Women and men have an equal right to apply for the position of Chief Executive Officer.
- Eg 2: Women and men receive equal medical treatment.

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## Equity

Gender equity means

- fairness of treatment for women and men, **according to their respective needs**.
- equal treatment **or** treatment that is different but which is considered equivalent in terms of rights, benefits, obligations and opportunities.

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## Difference

- Equity recognises difference:
  - Men and women have different roles
  - Men and women are different physiologically
  - Men and women live in different contexts:
    - Rural, wealth, socio-economic status, decision-making power, ability, etc.

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## Capabilities and Development

- Amartya Sen seeks to reconceptualise poverty, equity, and development.
- To evaluate development we should look at **capabilities to choose** a life a person has reasons to value.
- Life expectancy, education, and income are the key (but not the only) factors shaping a person's capabilities.
- But we also need to consider the person's relevant characteristics and circumstances which rule the conversion of goods into her ends.

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## Exercise 1.2: Gender divisions in an organisation

### Objective

- to understand the difference between equality and equity.

### Explanation

In 1994 this university employed almost equal numbers of women and men – precisely 833 women and 787 men. But does this mean women and men had equal opportunity to progress in their careers, and to extend their capabilities?

### Time

45 minutes

### Instructions

- 1 Form groups of 4.
- 2 Take butchers' paper, coloured pens.
- 3 Using Table 1.1 discuss the following questions and write down the responses and/or graphic analysis.
- 4 One group member reports on the group's responses:
  - What gender differences in employment can you identify?
  - What is the gender gap among academic staff?
  - What could be reasons for fewer women achieving the highest level of the academic scale?

### Plenary discussion

Would the gender gaps disappear if women and men are treated exactly the same?

**Table 1.1: University staff by classification and sex 1994**

	Female		Male		Total	
	No	%	No	%	No	%
Total university staff	833	51	787	49	1620	100
Academic staff	261	36	470	64	731	100
Associate Lecturer	93	53	82	47	175	100
Lecturer	106	46	123	54	229	100
Senior Lecturer	50	27	132	73	182	100
Associate Professor	9	12	68	88	77	100
Professor	3	4	65	96	68	100
Administrative staff	572	64	317	36	889	100
HEO 1-3 (low)	316	80	78	20	394	100
HEO 4-6 (middle)	156	50	155	50	311	100
HEO 7-10 (high)	100	54	84	46	184	100

### Source

Human Resource Data, 1996, Flinders University, Adelaide, Australia

## **MODULE 2**

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### **Gender analysis and development**

At the completion of the module participants will:

- understand the nature and role of gender disaggregated data and indicators in gender analysis
- develop skills in applying gender analyses frameworks and assess their strengths and weaknesses for different contexts
- apply gender analysis tools to APEC projects.

## Development indicators and gender sensitive indicators\*

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**Associate Professor Susanne Schech**  
Director, Centre for Development Studies  
Flinders University

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## Indicators

- Indicators are a spotlight
- Indicators are important to:
  - inform people about the level of economic and social well-being;
  - monitor distribution & level economic and social well-being – current state & changes, between groups, & over time;
  - assess progress toward goals or achievement of policy or project objectives
- Indicators are the currency of policy

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## Development Indicators

- Shifting from mainly economic to more diverse and specific indicators of social and economic well-being.
- Concept of 'human development' (UNDP 1990)
- Gradually collecting gender disaggregated data to measure gender inequalities - becoming 'mainstream' in 1995

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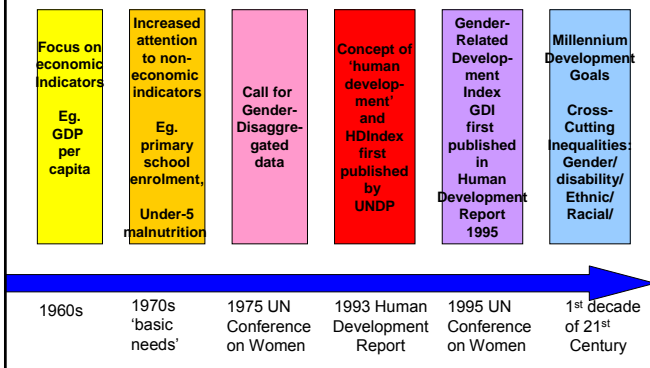
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## Shifts in development indicators




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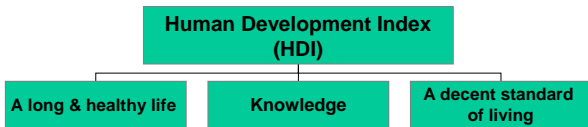
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## Human Development Index



- HDI values range from 0 to 1, with 1 indicating the highest level of well-being.
- The closer the value is to zero the more severe the levels of deprivation.
- Any differences between men and women are not visible.

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## Disaggregated data

- Data that is disaggregated by certain criteria.
- It could be on a variety of indicators, for example, age, wealth or ethnicity.
- Data that is disaggregated by gender is required so that we can compare the social and economic position of men and women.
- This is called **gender disaggregated data** (or sometimes: sex disaggregated data)

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## UN Gender-related Development Index (GDI)

- Gender-related Development Index (GDI) adjusts HDI for **gender inequality** in life expectancy, education and income and therefore allows us to see the differences between men and women.
- This index also ranks countries, provinces and districts within a country
- The values for GDI range between 0 and 1 whereby 1 is the highest level of gender adjusted well-being, and values closer to zero indicate increasing levels of gender-adjusted deprivation.

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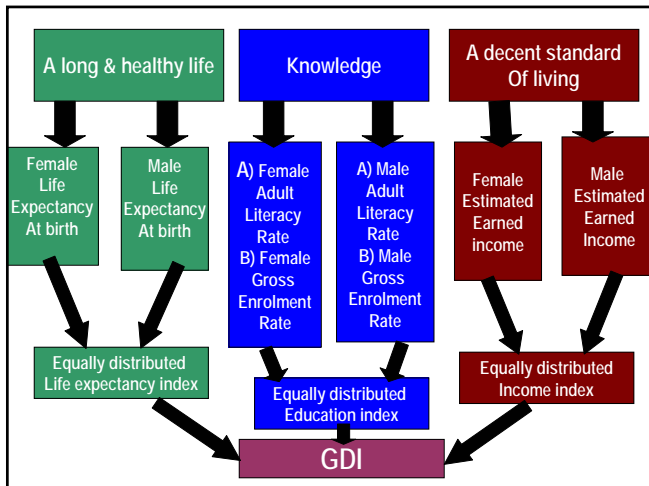
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## Gender Empowerment Measure

The GEM measures gender inequality in opportunities:

- Political participation and decision-making power
- Economic participation and decision-making power
- Power over economic resources

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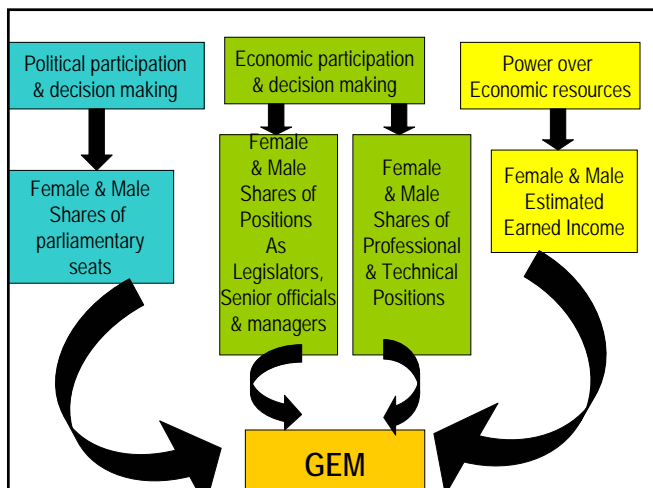
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### Gender Sensitive Indicators

- For in-depth gender analysis a wide variety of gender sensitive data is required.
- Beck defines a gender sensitive indicator as “an indicator that captures gender-related changes in society over time” which must be “relative to some agreed normative standard or explicit reference group” (Beck 1999:7)

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### Examples of gender sensitive indicators

<b>Education</b>	Number and percentage of literate persons, by gender and age Percentage of female/male teachers at primary, secondary and tertiary levels
<b>Health</b>	Calorie consumption as a % of minimum requirements, by sex Access to sanitation and clean water, by sex % of government expenditure devoted to women's health needs in a) productive and b) non-productive areas
<b>Economy</b>	% of female/male labour force in agriculture, industry and services (ages 15 and over) Salary/wage differentials of women/men, by class of workers % of available credit and financial and technical support going to women/men from government and non-government sources

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## Criteria for gender sensitive indicators

- Do they include *disaggregations*? sex, age, ethnicity, socioeconomic grouping are four of the most basic disaggregations required
- Do they report over *time*?
- Do they include *comparators* (eg male to female, females in one country to females in another country).
- Have they resulted from *participatory development*?
- Are accompanied by *gender analysis and related questions*?

Source: Beck T. *Using the Gender-sensitive Indicators: A Reference Manual for Governments and Other Stakeholders*. United Kingdom: Commonwealth Secretariat, 1999.

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## Why use gender sensitive indicators?

- To identify the extent of gender inequality at a certain point of time.
- To assist in the identification of the causes for inequality.
- To raise consciousness about gender differences and inequalities eg. in the community and amongst policy makers.
- To persuade policy makers to develop policies to promote gender equity goals.
- To monitor the success of policies/projects over time.

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## **Exercise 2.1: How gender equal are the APEC economies?**

### **Objectives**

- to understand the nature and role of quantitative gender disaggregated data in gender analysis
- to promote the ability to interpret quantitative gender disaggregated data.

### **Explanation**

The annual UN Human Development Report is a good source of gender disaggregated indicators, which can be used to compare APEC economies and analyse gender gaps. The most relevant tables for gender analysis are Tables 24 to 29.

### **Materials**

OHP foil; OHP pens; Tables 24 – 29 from the most recent Human Development Report.

### **Time**

60 minutes

### **Instructions**

- 1 Form six groups.
- 2 Discuss and write up your responses to the questions below (and anything else you want to comment on) on OHP foil and report to the plenary.

#### **Group 1: Table 2.1, Gender-related development index.**

Which countries have a lower GDI rank compared to their HDI rank? What pulls their GDI down?

#### **Group 2: Table 2.2, Gender empowerment measure.**

Which are the lowest ranking three countries and why? Why are some countries not ranked?

#### **Group 3: Table 2.3, Gender inequality in education.**

Where is educational opportunity most constrained? At which level is the gender gap most pronounced, and where?

#### **Group 4: Table 2.4, Gender inequality in economic activity.**

Where is the gender division of labour most equal? Where have women's economic activity rates declined and what could this indicate?

#### **Group 5: Table 2.5, Gender, work and time allocation.**

Which countries have the most equal work time allocation between women and men? In these countries, do women and men have the same opportunity to earn an income? Where is the gender distribution of time related to non-market activity least equal?

#### **Group 6: Table 2.6, Women and political participation.**

Which countries have the lowest women's political participation rates and according to which indicator? Where has most progress been made towards greater female political participation?

**Table 2.1 Gender-related Development Index (Human Development Report 2006. Beyond scarcity: Power, poverty and the global water crisis. UNDP, Palgrave Macmillan, Table 24, pp. 363-366)**

HDI rank	Country	Gender-related development index (GDI)		Life expectancy at birth, 2004 (years)		Adult literacy rate <sup>a</sup> , ages 15 and over, 2004 (%)		Combined gross enrolment ratio, primary, secondary and tertiary (%) 2004 <sup>b</sup>		Estimated income, 2004 (PPP, USD) <sup>c</sup>		HDI minus GDI	Rank <sup>d</sup>
		Rank	Value	Female	Male	Female	Male	Female	Male	Female	Male		
3	Australia	3	0.956	83.0	77.9	— <sup>e</sup>	— <sup>e</sup>	114	112	24,966	35,832	0	0
6	Canada	7	0.947	82.6	77.6	— <sup>e</sup>	— <sup>e</sup>	96 <sup>f,g</sup>	90 <sup>f,g</sup>	24,277 <sup>h</sup>	38,374 <sup>h</sup>	-1	-1
7	Japan	13	0.942	85.6	78.6	— <sup>e</sup>	— <sup>e</sup>	84	86	18,130	40,885	-5	-5
8	United States of America	8	0.946	80.2	74.8	— <sup>e</sup>	— <sup>e</sup>	97	89	30,581 <sup>h</sup>	49,075 <sup>h</sup>	1	1
20	New Zealand	20	0.932	81.5	77.0	— <sup>e</sup>	— <sup>e</sup>	105	95	19,264	27,711	0	0
22	Hong Kong, China (SAR)	—	—	84.8	78.9	—	—	74	79	20,637	42,166	—	—
25	Singapore	—	—	80.8	77.0	88.6	96.6	—	—	18,905	37,125	—	—
26	Korea, Republic of	25	0.905	80.9	73.7	— <sup>e</sup>	— <sup>e</sup>	88	101	12,912	28,036	-1	-1
34	Brunei Darussalam	—	—	79.1	74.5	90.2	95.2	78 <sup>f</sup>	76 <sup>f</sup>	—	—	—	—
38	Chile	37	0.850	81.1	75.1	95.6	95.8	80	82	6,134 <sup>h</sup>	15,715 <sup>h</sup>	-3	-3
53	Mexico	45	0.812	77.8	72.8	89.6	92.4	76	75	5,594	14,202	-1	-1
61	Malaysia	51	0.795	75.8	71.1	85.4	92.0	76 <sup>g</sup>	70 <sup>g</sup>	5,391	15,015	0	0
65	Russian Federation	50	0.795	72.0	58.9	99.2 <sup>e</sup>	99.7 <sup>e</sup>	92 <sup>f</sup>	84 <sup>f</sup>	7,735 <sup>h</sup>	12,401 <sup>h</sup>	3	3
74	Thailand	58	0.781	74.0	66.7	90.5	94.9	74	73	6,036	10,214	2	2
81	China	64	0.765	73.7	70.2	86.5	95.1	70 <sup>f</sup>	71 <sup>f</sup>	4,561 <sup>h</sup>	7,159 <sup>h</sup>	2	2
82	Peru	67	0.759	72.9	67.8	82.1	93.5	88 <sup>f</sup>	85 <sup>f</sup>	3,294	8,036	0	0
84	Philippines, Republic of the	66	0.761	72.8	68.6	92.7	92.5	84	79	3,449	5,763	2	2
108	Indonesia	81	0.704	69.2	65.3	86.8	94.0	67	70	2,257 <sup>h</sup>	4,963 <sup>h</sup>	0	0
109	Viet Nam	80	0.708	72.9	68.8	86.9 <sup>k</sup>	93.9 <sup>k</sup>	61 <sup>f</sup>	65 <sup>f</sup>	2,271 <sup>h</sup>	3,220 <sup>h</sup>	2	2
139	Papua New Guinea	103	0.521	56.3	55.2	50.9	63.4	38 <sup>f,g</sup>	43 <sup>f,g</sup>	2,127 <sup>h</sup>	2,934 <sup>h</sup>	2	2

**Notes**

- a Data refer to national literacy estimates from censuses or surveys conducted between 2000 and 2005, unless otherwise specified. Due to differences in methodology and timeliness of underlying data, comparisons across countries and over time should be made with caution. For more details, see [www.uis.unesco.org](http://www.uis.unesco.org).
- b In 2006 the United Nations Educational, Scientific and Cultural Organization (UNESCO) Institute for Statistics changed its convention for citing the reference year of education data to the calendar year in which the academic or financial year ends—from 2003/04, for example, to 2004.
- c Because of the lack of gender-disaggregated income data, female and male earned income are crudely estimated on the basis of data on the ratio of the female non-agricultural wage to the male non-agricultural wage, the female and male shares of the economically active population, the total female and male population and GDP per capita in purchasing power parity terms in US dollars. Estimates are based on data for the most recent year available during 1991-2004, unless otherwise specified.
- d The HDI ranks used in this calculation are recalculated for the 136 countries with a GDI value. A positive figure indicates that the GDI rank is higher than the HDI rank, a negative figure the opposite.
- e For the purposes of calculating the GDI, a value of 99.0% was applied.
- f Preliminary UNESCO Institute for Statistics estimate, subject to further revision.
- g Data refer to a year other than that specified.
- h No wage data available. For the purposes of calculating the estimated female and male earned income, a value of 0.75 was used for the ratio of the female non-agricultural wage to the male non-agricultural wage.

**Table 2.2 Gender Empowerment Measure (Human Development Report 2006. *Beyond scarcity: Power, poverty and the global water crisis.* UNDP, Palgrave Macmillan, Table 25 pp. 367-370)**

HDI rank	Country	Gender empowerment measure (GEM) rank		Parliamentary seats held by women (%) <sup>a</sup>	Female legislators, senior officials and managers (%) <sup>b</sup>	Female professional and technical workers (%) <sup>b</sup>	Ratio of estimated female to male income <sup>c</sup>
		Rank	Value				
3	Australia	8	0.833	28.3	37	55	0.70
6	Canada	11	0.810	24.3	36	56	0.63
7	Japan	42	0.557	10.7	10	46	0.44
8	United States of America	12	0.808	15.0	42	55	0.62
20	New Zealand	13	0.797	32.2	36	52	0.70
22	Hong Kong, China (SAR)	–	–	–	27	40	0.49
25	Singapore	18	0.707	18.9	26	45	0.51
26	Korea, Republic of	53	0.502	13.4	7	38	0.46
34	Brunei Darussalam	–	–	<sup>d</sup>	–	–	–
38	Chile	52	0.506	12.7	24	52	0.39
53	Mexico	35	0.597	25.0	25	42	0.39
61	Malaysia	55	0.500	13.1	23	40	0.36
65	Russian Federation	62	0.482	8.0	38	64	0.62
74	Thailand	60	0.486	10.7	28	53	0.59
81	China	–	–	20.3	–	–	0.64
82	Peru	39	0.580	29.0	19	44	0.41
84	Philippines, Republic of the	45	0.533	15.8	58	61	0.60
108	Indonesia	–	–	11.3	–	–	0.45
109	Viet Nam	–	–	27.3	–	–	0.71
139	Papua New Guinea	–	–	0.9	–	–	0.73

**Notes**

- a Data are as of 31 May 2006, unless otherwise specified. Where there are lower and upper houses, data refer to the weighted average of women's shares of seats in both houses.  
b Data refer to the most recent year available during 1992-2004. Estimates for countries that have implemented the recent International Standard Classification of Occupations (ISCO-88) are not strictly comparable with those for countries using the previous classification (ISCO-68)  
c Calculated on the basis of data in columns 9 and 10 in Table 24 (in this manual, Table 2.1)  
d Does not currently have a parliament.

**Table 2.3 Gender Inequality in Education (Human Development Report 2006. Beyond scarcity: Power, poverty and the global water crisis. UNDP, Palgrave Macmillan, Table 26 pp 371-374)**

HDI Rank	Country	2004		Youth literacy <sup>a</sup> , ages 15 and over,		Adult literacy <sup>a</sup> , ages 15 and over,		Youth literacy <sup>a</sup> , ages 15-24, 2004		Net primary enrollment <sup>b,c</sup> 2004 <sup>i</sup>		Net secondary enrollment <sup>b,c</sup> 2004 <sup>i</sup>		Gross tertiary enrollment <sup>c,d</sup> 2004 <sup>i</sup>	
		Female rate (%)	Female rate as % of male rate	Female rate (%)	Female rate as % of male rate	Female ratio (%)	Ratio of Female to male	Female ratio (%)	Ratio of female to male <sup>e</sup>	Female ratio (%)	Ratio of female to male <sup>e</sup>	Female ratio (%)	Ratio of female to male		
3	Australia	-	-	-	-	96	1.01	86 <sup>g</sup>	1.01 <sup>g</sup>	80	1.23				
6	Canada	-	-	100 <sup>g,h</sup>	1.00 <sup>g,h</sup>	94 <sup>i</sup>	0.99 <sup>i</sup>	70 <sup>j</sup>	0.99 <sup>i</sup>	70 <sup>j</sup>	1.36 <sup>j</sup>				
7	Japan	-	-	100	1.00	100 <sup>g,k</sup>	1.01 <sup>g,k</sup>	51	1.01 <sup>g,k</sup>	51	0.89				
8	United States of America	-	-	91	0.96	91	1.02	96	1.02	96	1.39				
20	New Zealand	-	-	99	1.00	96	1.03	74	1.03	74	1.41				
22	Hong Kong, China (SAR)	-	-	90 <sup>m</sup>	0.95 <sup>m</sup>	77 <sup>m</sup>	0.97 <sup>m</sup>	32	0.97 <sup>m</sup>	32	0.97				
25	Singapore	88.6	92	99.6	100	-	-	-	-	-	-				
26	Korea, Republic of	-	-	99	0.99	88	1.00	67	1.00	67	0.61				
34	Brunei Darussalam	90.2	95	98.9	100	-	-	17 <sup>g</sup>	-	17 <sup>g</sup>	1.74 <sup>g</sup>				
38	Chile	95.6	100	99.2	100	-	-	42	-	42	0.95				
53	Mexico	89.6	97	97.6	100	98	1.0	65	1.03	23	0.98				
61	Malaysia	85.4	93	97.3	100	93 <sup>l</sup>	1.00 <sup>l</sup>	81 <sup>l</sup>	1.14 <sup>l</sup>	38 <sup>l</sup>	1.41 <sup>l</sup>				
65	Russian Federation	99.2	100	99.8	100	92 <sup>g</sup>	1.01 <sup>g</sup>	-	-	979	91.36				
74	Thailand	90.5	95	97.8	100	-	-	44	-	44	1.17				
81	China	86.5	91	98.5	99	-	-	17 <sup>g</sup>	-	17 <sup>g</sup>	0.84 <sup>g</sup>				
82	Peru	82.1	88	95.7	98	97	1.00	69	1.00	34 <sup>g</sup>	1.03 <sup>g</sup>				
84	Philippines, Republic of the	92.7	100	95.7	101	95	1.02	67	1.20	32	1.28				
108	Indonesia	86.8	92	98.5	100	93	0.98	57	0.99	15	0.79				
109	Viet Nam	86.9 <sup>n</sup>	93 <sup>n</sup>	93.6 <sup>n</sup>	99	92 <sup>g,h</sup>	0.94 <sup>g,h</sup>	-	-	9 <sup>g</sup>	0.77 <sup>g</sup>				
139	Papua New Guinea	50.9	80	64.1	93	-	-	-	-	12 <sup>g</sup>	0.56 <sup>g</sup>				

**Notes**

- a Data refer to national literacy estimates from censuses or surveys conducted between 2000 and 2005, unless otherwise specified. Due to differences in methodology and timeliness of underlying data, comparisons across countries and over time should be made with caution. For more details, see [www.uis.unesco.org](http://www.uis.unesco.org).
- b The net enrolment ratio is the ratio of enrolled children of the official age for the education level indicated to the total population at that age. Net enrolment ratios exceeding 100% reflect discrepancies between these two data sets.
- c Data for some countries may refer to national or United Nations Educational, Scientific and Cultural Organization (UNESCO) Institute for Statistics estimates.
- d Tertiary enrolment is generally calculated as a gross ratio.
- e Calculated as the ratio of the female enrolment ratio to the male enrolment ratio.
- f In 2006 the UNESCO Institute for Statistics changed its convention for citing the reference year of education data to the calendar year in which the academic of financial year ends – from 2003/04, for example, to 2004.
- g Preliminary UNESCO Institute for Statistics estimate, subject to further revision.
- h Data refer to the 2001 school year.
- i Data refer to the 1999 school year.
- j Data refer to the 2002 school year.
- k Data refer to the 2000 school year.
- l Data refer to the 2003 school year.
- m National estimate
- n Data refer to a year between 1995 and 1999.

**Table 2.4 Gender Inequality in Economic Activity (Human Development Report 2006. Beyond scarcity: Power, poverty and the global water crisis. UNDP, Palgrave Macmillan, Table 27 pp. 375-378)**

HDI rank	Country	Female economic activity, ages 15 and older, 2004			Employment by economic activity <sup>a</sup> , 1995-2003 <sup>b</sup> (%)		Services		Contributing family workers, 1995-2004 (%) <sup>b</sup>	
		Rate (%)	Index (1990=100)	Female as % of male rate	Agriculture	Industry	Female	Male	Female	Male
3	Australia	56.1	108	79	3	10	87	64	59	41
6	Canada	60.2	104	83	2	11	87	64	66	34
7	Japan	48.5	97	65	5	21	73	57	80	20
8	United States of America	59.6	105	81	1	12	87	65	64	36
20	New Zealand	59.8	112	81	6	12	82	56	68	32
22	Hong Kong, China (SAR)	52.9	112	74	-	10	90	73	86	14
25	Singapore	50.8	101	66	-	18	81	69	76	24
26	Korea, Republic of	50.1	106	68	12	19	70	57	89	11
34	Brunei Darussalam	44.3	99	56	-	-	-	-	-	-
38	Chile	36.4	113	51	-	-	-	-	54	46
53	Mexico	46.1	105	56	14	29	57	45	71	29
61	Malaysia	39.9	115	49	6	22	72	48	51	49
65	Russian Federation	54.3	90	80	8	23	69	49	7	22
74	Thailand	65.4	87	81	48	17	35	30	64	36
81	China	69.2	95	84	-	-	-	-	-	-
82	Peru	58.2	124	71	6	10	84	65	66	34
84	Philippines, Republic of the	53.8	114	65	25	12	63	37	56	44
108	Indonesia	50.7	101	60	-	-	-	-	-	-
109	Viet Nam	72.4	98	93	-	-	-	-	71	29
139	Papua New Guinea	71.8	100	97	-	-	-	-	-	-

**Notes**

- a The percentage shares of employment by economic activity may not sum to 100 because of rounding or the omission of activities not classified.
- b Data refer to the most recent year available during the period specified.

**Table 2.5 Gender, work and time allocation (Human Development Report 2006. Beyond scarcity: Power, poverty and the global water crisis. UNDP, Palgrave Macmillan, Table 28 p. 379)**

Country	Year <sup>a</sup>	Total work time (hours and minutes per day)		Female work time (% of male)	Time allocation (%)					
		Female	Male		Total work time		Time spent by women		Time spent by men	
					Market activities <sup>b</sup>	Non-market activities	Market activities <sup>b</sup>	Non-market activities	Market activities <sup>b</sup>	Non-market activities
Indonesia (urban)	1992	6h 38m	6h 6m	109	60	40	35	65	86	14
Philippines, Republic of the (rural)	1975-7	9h 6m	7h 32m	121	73	27	29	71	84	16
Australia	1997	7h 15m	6h 58m	104	46	54	30	70	62	38
Canada	1998	7h 0m	7h 9m	98	53	47	41	59	65	35
Japan	1996	6h 33m	7h 3m	108	66	34	43	57	93	7
Korea, Republic of	1999	7h 11m	6h 13m	116	64	36	45	55	88	12
Mexico	2002	8h 10m	6h 25m	127	46	54	23	77	78	22
New Zealand	1999	7h 0m	6h 57m	101	46	54	32	68	60	40
United States of America	1985	7h 33m	7h 8m	106	50	50	37	63	63	37

**Notes**

a Surveys before 1993 are not strictly comparable with those of later years.

b Refers to market-oriented production activities as defined by the 1993 revised UN System of National Accounts..

**Glossary of terms used in tables 2.1 – 2.6**

<b>female economic activity rate</b>	<i>share of the female population, aged 15 plus, who supply and are available to supply, labour for the production of goods and services.</i>
<b>contributing family workers</b>	<i>a person who works without pay in an economic enterprise operated by a related person living in the same household.</i>
<b>market activities</b>	<i>1993 UN System of National Accounts defined them as employment in establishments, primary production not in establishments, services for income, other goods not in establishments</i>
<b>non-market activities</b>	<i>1993 UN System of National Accounts defines them as household maintenance, shopping for own household, care of children, sick, elderly and disabled in own household and community services.</i>
<b>enrolment ratio net</b>	<i>number of students enrolled in a level of education who are of official school age for that level as percentage of population of official school age for that level.</i>
<b>gross tertiary enrolment</b>	<i>number of students enrolled in a level of education regardless of age as percentage of population of official school age for that level.</i>



**Table 2.6 Women's Political Participation (Human Development Report 2006. Beyond scarcity: Power, poverty and the global water crisis. UNDP, Palgrave Macmillan, Table 29 pp 380-383)**

HDI rank	Country	Year women first received right <sup>a</sup>		Year a female (E) or appointed (A)	Women in government at ministerial level, 2005 (% of total ministers) <sup>b</sup>	Parliamentary seats held by women (%) <sup>c</sup>		
		To vote	To stand for election			Lower or single house 1990	Upper house or senate, 2006	
3	Australia	1902, 1962	1902, 1962	1943 E	20.0	6	24.7	35.5
6	Canada	1917, 1960	1920, 1960	1921 E	23.1	13	20.8	35.0
7	Japan	1945, 1947	1945, 1947	1946 E	12.5	1	9.0	14.0
8	United States of America	1920, 1965	1788 <sup>d</sup>	1917 E	14.3	7	15.2	14.0
20	New Zealand	1893	1919	1933 E	23.1	14	32.2	—
22	Hong Kong, China (SAR)	—	—	—	—	—	—	—
25	Singapore	1947	1947	1963 E	0	5	18.9	—
26	Korea, Republic of	1948	1948	1948 E	5.6	2	13.4	—
34	Brunei Darussalam	—	—	—	9.1	—	—	—
38	Chile	1949	1949	1951 E	16.7	—	15.0	5.3
53	Mexico	1947	1953	1952 A	9.4	12	25.8	21.9
61	Malaysia	1957	1957	1959 E	9.1	5	9.1	25.7
65	Russian Federation	1918	1918	1993 <sup>e</sup> E	0	—	9.8	3.4
74	Thailand	1932	1932	1947 A	7.7	3	10.8	10.5
81	China	1949	1949	1954 E	6.3	21	20.3	—
82	Peru	1955	1955	1956 E	11.8	6	29	—
84	Philippines	1937	1937	1941 E	25.0	9	15.7	16.7
108	Indonesia	1945	1945	1950 A	10.8	12	11.3	—
109	Viet Nam	1946	1946	1946 E	11.5	18	27.3	—
139	Papua New Guinea	1964	1963	1977 E	—	0	0.9	—

**Notes**

- a Data refer to the year in which the right to vote or stand for national election on a universal and equal basis was recognized. Where two years are shown, the first refers to the first partial recognition of the right to vote or stand for election. In some countries, women were granted the right to vote or stand at local elections before obtaining these rights for national elections. Data on local election rights are not included in this table.
- b Data are as of 1 January 2005. The total includes deputy prime ministers and ministers. Prime ministers who hold ministerial portfolios and vice-presidents and heads of ministerial-level departments or agencies who exercise a ministerial function in the government structure are also included.
- c Data are as of 31 May 2006 unless otherwise specified. The percentage was calculated using as a reference the number of total seats filled in parliament at that time
- d No information is available on the year all women received the right to stand for election. However, the constitution does not mention gender with regard to this right.
- e Refers to the year women were elected to the current parliamentary system.
- f Brunei Darussalam does not currently have a parliament.

# GENDER ANALYSIS FRAMEWORKS\*

APEC SOM Gender Analysis Workshop  
Cairns 26-27 June 2007

**Associate Professor Susanne Schech**  
Director, Centre for Development Studies  
Flinders University

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## Gender Analysis

- examines the differences in women's and men's lives, including those which lead to social and economic inequity for women, and applies this understanding to policy development and service delivery
- investigates the underlying causes of these inequities
- aims to achieve positive change for women

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## Who gets what, when, where, and why

Gender analysis examines

- The development context or patterns in an area, answering the questions *What is getting better? What is getting worse?*
- Women's and men's activities and roles, answering the questions *Who does what?*
- Women's and men's access to and control over resources, answering the questions *Who has what? Who needs what?*
- The underlying causes of gender inequalities, answering questions *Why and how is this gender gap occurring?*
- The programme actions needed, answering the questions *What should be done to close the gaps between what women, and men need? What does the intervention deliver?*

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### What are Gender Analysis Frameworks?

- Gender analysis frameworks and approaches are practical instruments designed to help their users facilitate the integration of a gender analysis into their work
- Since the 1980s there have been many gender analysis frameworks
- Which framework is best depends on what it is used for

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### Alternative names for Gender Analysis Framework

- 'gender based analysis framework',
- 'gender analysis approach',
- 'gender diagnosis framework',
- 'gender analysis guidelines',
- 'gender impact assessment',
- 'gender lens assessment'
- 'engendering framework'

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### Different gender analysis frameworks are designed for

- use at **national, regional, state** and **market levels**;
- use at **local levels** (including community and household levels)
- **governments, non-government organisations, local agencies, groups** and **individuals**;
- **policy, budgeting, program** and **project level work**; and
- particular fields such as **development** (including urban development, rural development and emergency relief work), **health** and **education**.

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## Some points to consider

- No gender analysis framework is likely to be perfect or comprehensive because each selects a limited number of factors as important.
- The factors reflect a set of values and assumptions which will influence the type of interventions that you select.
- You need to be aware of the thinking behind the gender frameworks.
- You can combine factors and tools from different frameworks to produce your own framework that best suit a particular purpose.

Source: Marsh, C., Smyth, I. & Mukhopadhyay, M. 1999 *A Guide to Gender-analysis frameworks*, Oxfam, Oxford.

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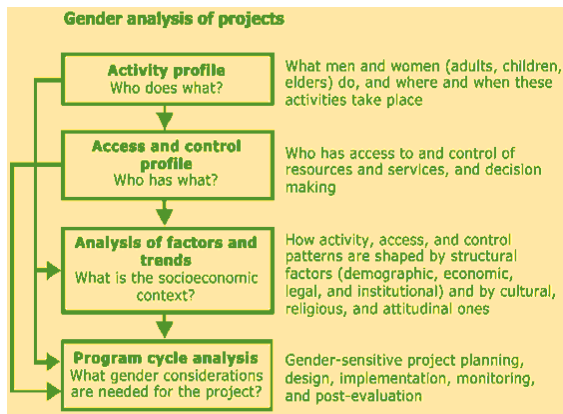


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## GAF 1: Gender Roles Framework




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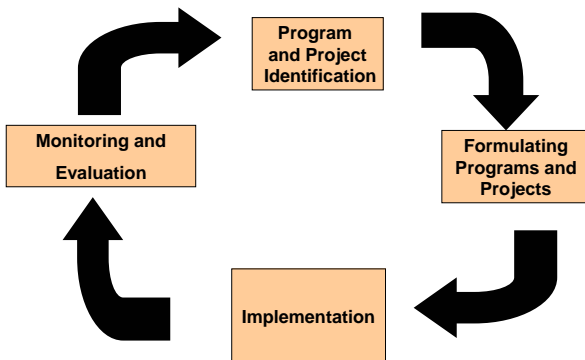


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## Overview of program/planning cycle




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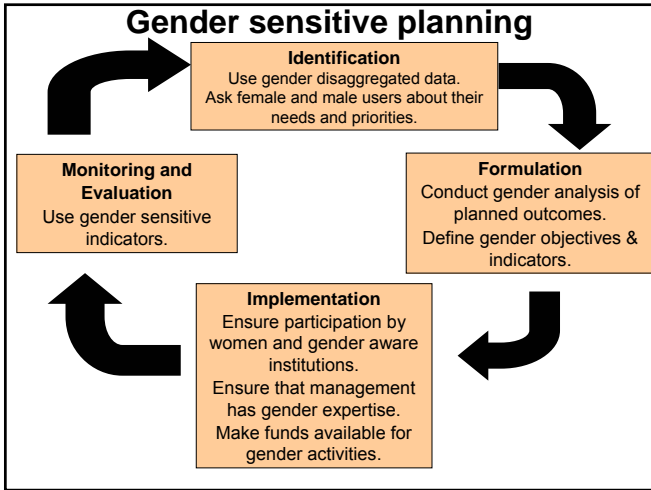
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### GAF 2: Women's Empowerment Framework

Also called Longwe Framework, after the person who developed it

Aims:

- to empower women to take an equal place with men
- to help planners assess whether a development intervention empowers women

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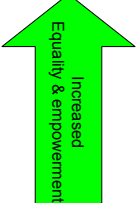
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### Women's Empowerment Framework tools

- Tool 1: levels of equality
 



Control

Participation

Conscientisation

Access

Welfare
- Tool 2: level of recognition of 'women's issues'  
Negative ---- neutral ---- positive

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### Combining tools 1 and 2

Project title:			
	Levels of recognition		
Levels of equality	Negative	Neutral	Positive
Control			
Participation			
Concientisation			
Access			
Welfare			

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### APEC framework for the integration of women

- 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)

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## **Exercise 2.2: Comparing gender analysis frameworks**

### **Objective**

- to develop a sense of how some of these frameworks can be used, and what their strengths and weaknesses are.

### **Explanation**

In this exercise we will try to apply the three different gender analysis frameworks above to see how useful they are in analyzing an APEC project proposal. We will use the APEC checklist for analyzing projects, the Gender Roles Framework, and the Women's Empowerment Framework. All of these frameworks have been edited to fit the timeframe of this exercise. References provided at the end of this module contain more comprehensive information about these gender analysis frameworks.

### **Materials**

Handouts of the 3 gender analysis frameworks.

### **Instructions**

- 1 Form groups of 4.
- 2 Read the project description below.
- 3 Each group will use one of the frameworks provided as handouts and on pages x-y: Group 1 APEC Checklist, group 2 Gender Roles Framework, Group 3 Women's Empowerment Framework, etc.
- 4 Report to the plenary how useful you found your gender analysis tool in assessing the gender sensitivity of the proposed project – what are its strengths and weaknesses, and why?

### **Time**

50 minutes

### ***Scenario background for case study***

Your government has been sent a project proposal by the APEC Micro-Enterprise Sub-group and is asked to indicate whether it is interested in participating in a similar project next year. Your minister has asked you as her policy, program and projects analysis team to conduct a gender analysis of the project proposal. Your team is invited to apply the tools from the selected gender analysis frameworks to this project proposal.

**Note:** Background document 2 is an edited version of APEC project proposal 2006/BMC2/018 SME 02/2007A. The full project proposal can be downloaded from the APEC website ([www.apec.org](http://www.apec.org))

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

#### Details of the Project Proposal

##### 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 9<sup>th</sup> 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 2000<sup>1</sup> 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<sup>2</sup>.

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 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*

To increase APEC's knowledge and understanding of successful support strategies to support 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.

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.

<sup>1</sup> 'Profiles of SMEs and SME issues in APEC 1990 -2000.' Published by the APEC Secretariat in 2002

<sup>2</sup> 'Profiles of SMEs and SME issues in APEC 1990 -2000.' Published by the APEC Secretariat in 2002



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.

#### **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. The WLN 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.

### **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.

### **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.

<b>Time Line</b>	<b>Summary of steps needed</b>	<b>Funding required</b>
Phase I: Jan – March 2006	Report on seven different strategies to support microenterprise development through the strengthening of international trade links	Self –funded
Phase II: March – October, 2006	<ul style="list-style-type: none"> <li>• Proposal revision based on feedback from MESG</li> <li>• Workshop organization &amp; delivery</li> <li>• Selection of three specific policy and program support models to participate in the feasibility study</li> </ul>	Self-funded
Phase III: November 2006 – December 2007	<p>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</p> <p>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</p> <p>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</p> <p>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</p>	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
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[...]

## **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
- 420 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)

e. *a publicity plan for*

- briefing the general or specialist media about key components of the project
- the promotion of sales or other dissemination of the final product
- preparation and distribution of press releases on the best practices guidelines to key media contacts identified by each economy.
- posting of the best practices paper, feasibility study and guidelines on the APEC website

f. *a budget for publication and dissemination, to form part of the itemized budget*

(refer to itemized budget)

budget includes graphic design, CD production, and hard copy production

## Gender concerns

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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.

<b>Budget</b>				
<p><b>Itemized Budget for Financial Year _2007*</b>            (Please tick ✓.)            This project is:  <input type="checkbox"/> a seminar, symposium or short-term training course  <input checked="" type="checkbox"/> a survey or analysis and research project  <input type="checkbox"/> neither the above but involves the provision of equipment</p>				
<b>Items</b>	<b>No. of Units</b>	<b>Unit Rate</b>	<b>APEC Funding (USD)</b>	<b>Self Financing (USD)</b>
<b>Direct Labour</b>				
- Speaker's Honorarium (government officials ineligible)	(no. of speakers)			
- Translator's Fees	(no. of pages)			
- Short-term clerical and secretarial staff remuneration	(no. of hours)			
- Consultant (including Researcher) Fees	(no. of hours) 2006 – 635.29 2007 – 1293.62	\$85	<u>2007</u> \$74,435	<u>2006</u> \$54,000  <u>2007</u> \$35,523
- Consultant's Secretary Cost (included as part of consultant fees)	(no. of hours)			
<b>Travel (Speakers/Experts/ Researchers)</b>				
- Per Diem (incl. accommodation and 'additional payment')	(no. of persons and days) 2006 – 3 persons x 4 days <u>2007</u> - 3 persons x 30 days	\$200	<u>2007</u> – \$11,400	<u>2006</u> - \$2,400
- Airfare	(no. of persons and trips) <u>2006</u> – 3 pers. X 1 mission <u>2007</u> – 3 pers. X 1 mission	\$3,500	<u>2007</u> - \$10,500	<u>2006</u> - \$10,500

If project will continue for more than one year, please indicate the amount of funds required for each of the two financial years in question. (over page)

Items	No. of Units	Unit Rate	APEC Funding (USD)	Self Financing (USD)
<b>Travel (Active participants/ participants/trainees) (only from travel-eligible economies)</b>				
– Per Diem (incl. accommodation and ‘additional payment’) (active participants)	(no. of persons and days)			
– Airfare (restricted economy class)	(no. of persons and trips)			
– Other items – Contingency* (for increases in airfare, to cover falling exchange in US \$, and cover unforeseen costs depending upon countries selected for the studies)  – General Services Tax – Canada (for Phases I & II – not applicable to Phase III)			2007 7490	2006 – Contingency \$2620  2006 - GST \$3420
– Publication of report (including distribution)	(no. of copies) 2007 - 420		2007 - \$2700	
– Equipment / Materials (describe briefly what is required and why)	(no. and type of equipment) (no. of days for rental)			
<b>Photocopying (no. of copies)</b>				
Communications (Phone/ Fax/ Mail/Courier)	2006 - 350		2007 - \$500	2006 - \$765
Hosting (pl. briefly describe, e.g., conference room rental, stationery)	(units as appropriate) (no. of days for rental)			
<b>Total</b>			<b>\$107,025</b>	<b>\$109,228</b>

## 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#](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
<b>Women will be consulted on the design and implementation of the project</b>	
- 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?	
<b>Sex-disaggregated data will be collected and used in the project</b>	
- 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><b>The project will be beneficial for women</b></p>	
<ul style="list-style-type: none"> <li>- Will the project focus on women?</li> </ul>	
<ul style="list-style-type: none"> <li>- Will the project involve industries or areas of the labour market or community that are likely to benefit women?</li> </ul>	
<p><b>Efforts will be made to address potential adverse effects on women</b></p>	
<ul style="list-style-type: none"> <li>- Will the impact of the project on women and men be considered?</li> </ul>	
<ul style="list-style-type: none"> <li>- Can you identify any areas of the project that could have a potential negative impact on women?</li> </ul>	
<ul style="list-style-type: none"> <li>- If so, are you able to modify the project to limit these effects?</li> </ul>	
<p><b>Women's involvement is assessed in the evaluation of the project</b></p>	
<ul style="list-style-type: none"> <li>- Will the impact of the project on women and men be considered?</li> </ul>	
<p><b>Information on the project will be disseminated to women</b></p>	
<ul style="list-style-type: none"> <li>- Will you consider ways to communicate the results of the project to women?</li> </ul>	

**Note**

Also refer to Background document 1 on the Integration of women in APEC.



## Framework 2: Gender Roles Framework (GRF OR Harvard Analytical Framework)

The Gender Roles Framework (GRF), which is also referred to in some publications as the Harvard Analytical Framework (Harvard), was one of the first frameworks designed for gender analysis (March *et al* 1999, p. 32). The four key tools in this framework are:

**Tool 1: Activity Profile** which involves the mapping of the range of activities in which women and men (and/or girls and boys) engage

**Tool 2: Access and Control Profile** which requires the identification and assessment of the resources available to men and women (and/or girls and boys), who controls them, and who controls the benefits derived from their use

**Tool 3: Influencing Factors Analysis** which involves the identification and analysis of the factors that determine access and control of resources and their benefits  
**Tool 4: Project Cycle Analysis** which requires the completion of a checklist of questions for assessing gender sensitivity of projects at the identification, design, implementation and evaluation stages of the project cycle.

Most relevant for the gender analysis of projects is Tool 4. A set of four checklists was developed for this tool, focusing on project identification, design, implementation and evaluation. We will only use checklist 1 (project identification) for this exercise.

Checklist 1: Women's dimension in project identification	
<b>Assessing women's needs</b>	Your comments based on project case study
What needs and opportunities exist for increasing women's productivity and/or production?	
What needs and opportunities exist for increasing women's access to and control of resources?	
What needs and opportunities exist for increasing women's access to and control of benefits?	
How do these needs and opportunities relate to the country's other general and sectoral development needs and opportunities?	
Have women been directly consulted in identifying such needs and opportunities?	

<b>Defining general project objectives</b>	
Are project objectives explicitly related to women's needs?	
Do these objectives adequately reflect women's needs?	
Have women participated in setting those objectives?	
Have there been any earlier efforts?	
How has the present proposal built on earlier activity?	
<b>Identifying possible negative effects</b>	
Might the project reduce women's access to or control of resources and benefits?	
Might it adversely affect women's situation in some other way?	
What will be the effects on women in the short and longer term?	

Checklist adapted from Overholt, Anderson, Cloud and Austin, *Gender Roles in Development Projects*, Kumarian Press, Connecticut, 1985.  
 Also available <http://www.ilo.org/public/english/region/asro/mdtmanila/training/unit1/harvrdfw.htm>

## Women's Empowerment (Longwe) Framework

### Overview

#### Women's Empowerment Framework (WEF or Longwe Framework)

The Women's Empowerment Framework (sometimes referred to as the Longwe Framework) defines women's empowerment as 'being concerned with women's issues, where the overall issue is equality with men, and overcoming inequality' (Longwe in Williams *et al.*, 1994 p. 292). The two key tools in this framework are the:

- Tool 1: Levels of equality gender profile** which is designed to assess projects at different stages of the project cycle for increased empowerment and equality. Five levels of equality (welfare, access, conscientisation, participation and control) are used to make the assessment.
- **Welfare:** the level of women's material welfare (such as food supply, income and, medical care), relative to men.
  - **Access:** women's access to the factors of production on an equal basis with men; equal access to land, labour, credit, training, marketing facilities, and all public services and benefits.
  - **Conscientisation:** a conscious understanding of the difference between sex and gender, and an awareness that gender roles are cultural and can be changed.
  - **Participation:** women's equal participation in the decision-making process, in policy-making, planning, and administration.
  - **Control:** a balance of control between men and women over the decision-making process so that neither side dominates.

**Tool 2: Level of recognition of women's issues profile** which involves identifying the extent to which a project's objectives 'are concerned with women's development purely in terms of whether women's issues are ignored or recognised' (Longwe in Williams *et al.* p. 295). The three levels put forward to identify the degree of recognition in projects are the

- Negative Level (no mention of women's issues)
- Neutral Level (recognise women's issues but remain neutral)
- Positive Level (positively concerned with women's issues and with improving the position of women)

**Example of Women's Empowerment Framework Tools 1 and 2**

<b>Project Title</b>				
	<b>Level of recognition</b>	<b>Negative</b>	<b>Neutral</b>	<b>Positive</b>
	<b>Levels of equality</b>			
<b>Control</b>				
<b>Participation</b>				
<b>Conscientisation</b>				
<b>Access</b>				
<b>Welfare</b>				

## **USEFUL BACKGROUND READINGS FOR GENDER ANALYSIS FRAMEWORKS**

- Longwe, Sarah Hlupelkile 1994, 'Gender Awareness: the missing element in the Third World development project' in Suzanne Williams, Janet See and Adelina Mwau *The Oxfam Gender Training Manual*, Oxfam UK and Ireland, pp. 291-303
- Longwe, Sarah Hlupelkile 1991, 'Gender Awareness: the missing element in the Third World development project' in T. Wallace and C. March *Changing Perceptions: Writings on gender and development* Oxford: Oxfam, pp. 149-157.
- Marsh, C., Smyth, I. & Mukhopadhyay, M. 1999, *A Guide to Gender-analysis frameworks*, Oxfam, Oxford.
- Moser, C. 1993, *Gender Planning and Development*, Routledge London, p.235
- Overholt, C., Anderson, MB, Cloud, K., and Austin, JE. 1985, *Gender Analysis in Development Projects: A Case Book*, Kumarian Press, West Hartford, USA.
- Rao, A., Anderson, M.B., Overholt, C. A. 1991, *Gender Analysis in Development Planning: A Case Book*, Kumarian Press, West Hartford, USA.

### **Exercise 2.3: Clear and muddy points?**

#### **Objective**

- to ensure that participants critically reflect on their learning from Day 1 in relation to their own workplace context/s.

#### **Explanation**

The purpose of the exercise is to provide participants and trainees with feedback on day 1. Muddy points are issues that a participant does not understand. Clear points are something that a participant will take from the workshop – something new a participant has learnt or seen in a new light.

#### **Time**

15 minutes.

#### **Materials**

2 card per person – 1 clear and 1 muddy

#### **Instructions**

- 1 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.
- 2 Trainer will collect the cards and put them up for a brief review.

## **MODULE 3**

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### **Putting gender analysis into practice**

At the completion of the module participants will be able to:

- understand the role of gender analysis in achieving organizational and national objectives and the different entry points for undertaking gender analysis.
- develop an awareness that government budgets have been adopted as an entry point for gender mainstreaming by some members of APEC.
- identify the benefits of gender responsive budgeting and the frameworks and tools of gender analysis that have been developed.

**Gender Analysis in Context**

APEC SOM Gender Analysis Workshop  
Cairns 26-27 June 2007

**Rhonda Sharp**  
Professor of Economics  
Hawke Research Institute  
University of South Australia

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**Gender analysis**

Need to consider:

- How to do it
- How it can be used to bring about change

These questions involve technical skills and know how, institutional arrangements and politics. Also the choice of how to do gender analysis is related to the use intended.

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**Different frameworks of gender analysis are available**

Frameworks considered on day 1:

- Gender roles framework
- Women's empowerment framework
- APEC framework for the integration of women

Day 2 a framework for a:

- **gender analysis of the budget** will be introduced.

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### Gender analysis can be undertaken at different entry points and levels

The analysis can be:

- Of an activity or project (gender specific or general)
- Sector (tourism, education, communications)
- Economy wide or decentralised policy or budget

It can focus on the:

- Policy cycle and its different phases (planning, implementation, monitoring, evaluation)
- Budget or resource allocation cycle and its different phases (formulation, execution, implementation, monitoring, audit)

It can involve different participants at different entry points and stages, including individuals and groups at the grass roots, public servants, researchers, private sector organisations, media, high level decision makers and legislators.

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### The use of gender analysis in bringing about change

#### What?

What needs to change for women and girls?

What needs to change for men and boys?

What does this mean for different groups of women and girls, men and boys?

#### How?

What strategies are available?

#### Why?

What goals, objectives and targets will the strategies advance?

- International (eg MDG's)
- National (different countries vary in their socio economic goals and gender equality commitments)
- Organisational (APEC, your workplace)
- Other

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### Requirements if gender analysis is to contribute to change

- ❖ A tool for assessing the level of integration of gender analysis has been developed by Caren Levy at DPU.
- ❖ Termed the 'web of institutionalisation' it identifies more than 13 elements that are crucial to the process of embedding gender analysis into economies.
- ❖ If gender analysis is going to contribute to change, it needs to be **embedded** or otherwise integrated into the context in which it is being used. This makes it both a technical skills and political process.

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### Potential for Change?

The following diagram (DPU/3) shows at least 13 reinforcing elements are important in institutionalising a gender perspective in a particular context or entry point. For example, starting with political commitment as one of these elements, the diagram shows that this requires both resources and policy. Furthermore, the allocation of the resources and the development and enactment of policy depend on the responsibility for gender issues being mainstreamed throughout the institutions. This requires both procedures and staff development for gender analysis.

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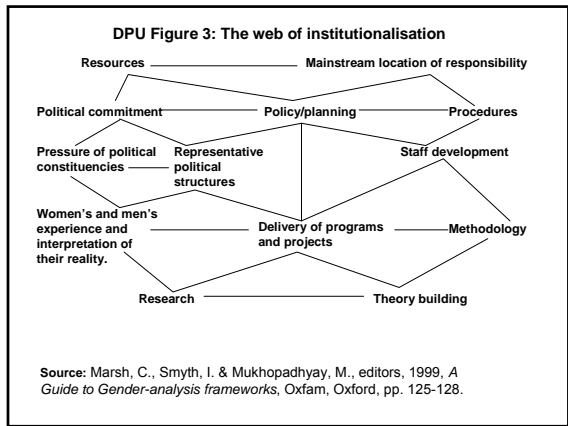
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### Reading the tool

The web combines elements in a triangle which reinforce each other either positively or negatively for bringing about a change in gender relations and associated changes in economic and social outcomes.

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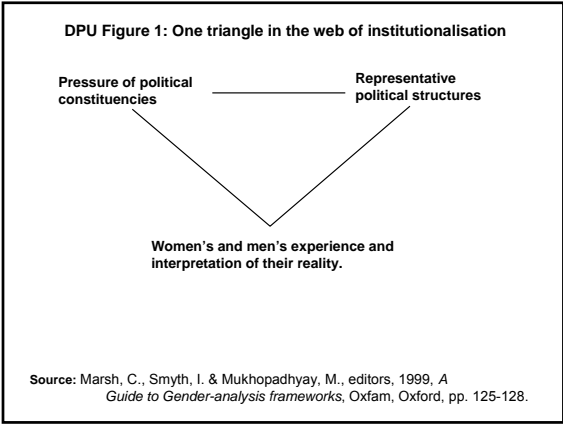
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**Triangle of elements**

For example, in diagram DPU/1 men and women's experience and view of reality must be expressed through collection action in the political arena if positive change is to occur. Furthermore, men and women must be able to elect and/or engage with the formal political system (the next element in the triangle) otherwise their interests will remain outside formal politics.

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**Reinforcing elements in a triangle connect with other elements**

For example, in Diagram DPU/2 the

- pressure of political groups constituencies and
- representative political structures
- need to be supported by political commitment (the public articulation of a political intent or stand which sets the tone for action)

If sustainable change is to occur.

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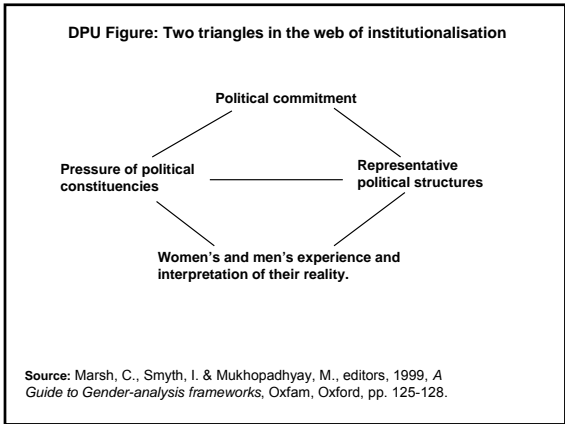
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### Summary

Gender analysis involves:

- ✓ A choice of frameworks and tools of analysis
- ✓ Different entry points
- ✓ Consideration of how to use it to promote change including what, how and why questions about that change
- ✓ An assessment of the enabling and constraining forces in the context in which gender analysis is being introduced.

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**Exercise 3.1: Rating the progress of APEC fora reports group exercise**

**Objectives**

- to provide a practical example of an APEC Fora report on the 'Framework for the Integration of Women in APEC and to assess its foci and omissions
- to appreciate the need for sex-disaggregated data and gender sensitive indicators in gender analysis
- to increase participants understanding of gender issues in an economic sector such as fisheries.

**Materials**

APEC Fisheries Working Group report on the 'Framework for the Integration of Women in APEC 2006'

Notes on Gender and Fisheries in Pacific Countries.






Flip charts for each group.

**Time**

30 Minutes

**Instructions**

- 1 Form small groups.
- 2 Ask participants to read the (1) APEC 2006 Fisheries Working Group Report on the Framework for the Integration of Women in APEC and (2) Notes on Gender and Fisheries in Pacific Countries, and to discuss what progress has been achieved in integrating gender into the work of the APEC fisheries group.
- 3 Each group is asked to assign a rating to the APEC fisheries report according the progress it describes in implementing a gender perspective in the work of the fisheries working group:

<p><b>One fish</b> </p>	<p>Shows a complete lack of understanding of the task of integrating a gender perspective</p>
<p><b>Two fish</b> </p>	<p>Shows minimal understanding of the task of integrating a gender perspective</p>
<p><b>Three fish</b> </p>	<p>Progress is evident but major gaps remain</p>
<p><b>Four fish</b> </p>	<p>A valuable gender perspective that could lead to greater equity, efficiency and effectiveness in APEC fisheries policies and strategies</p>
<p><b>Five fish</b> </p>	<p>A gender perspective is mainstreamed throughout fisheries and the benefits are clearly evident.</p>

- 4 Each group to identify the reasons for their 'fish' rating.
- 5 Group report back.

## **Fisheries Working Group Report on the Implementation of Framework for the Integration of Women in APEC**

### **GENDER ANALYSIS**

#### **At fora level**

- Question* If a gender focal point has been assigned and his/her role and status are acknowledged? Are gender experts invited to advice gender perspective?
- Answer* The Lead Shepherd of FWG has personally undertaken the role of gender focal point, and if necessary, will invite gender experts to advise gender perspective.
- Question* How a gender perspective is considered in program, work plan and project formulation, implementation and assessment?
- Answer* All FWG projects, during the stages of formulation, implementation and assessment, are required to complete the relevant forms set by the APEC Secretariat, further ensuring the implementation of gender perspective.
- Question* How visible is gender throughout meeting agendas and supporting documents and reports?
- Answer* All FWG meeting agendas and supporting documents and reports have taken consideration of women's participation.
- Question* What are your specific recommendations to promote gender integration in your area to submit to SOM?
- Answer* FWG continues its effort in supporting women's participation and any improve in respect with gender perspective.

#### **Collect and use of sex-disaggregated data at both economy and fora levels**

- Question* How is the situation of sex-disaggregated data improved? Availability of sex-disaggregated data to be accessed and applied
- Answer* Presently, FWG has no sex-disaggregated data to be accessed and applied
- Question* Sex-disaggregated data is collected and used effectively in policy making, project design and assessment
- Answer* Presently, FWG has not collected sex-disaggregated data

#### **The involvement of women in APEC at fora level**

- Question* Percentage of women as APEC contact or focal point and as delegates
- Answer* Several economies such as Canada, Brunei Darussalam, New Zealand have appointed women as their FWG focal point, and several economies such as China, Chinese Taipei, the Philippines, United States, Thailand, Vietnam have sent women as delegates to participate in the meeting or workshop held by FWG.
- Question* How women's concerns are integrated and women's participation in APEC projects

*Answer* To provide an example of women's participation in APEC projects, the APEC Seminar on Sharing Experiences in Managing Fishing Capacity (FWG 01/2006), which was held on 8-9 May 2006, invited a total 7 speakers to make presentations on related topics and 4 of them were female officials or scholars.

*Question* The support for women's participation in as well as for women's working group such as WLN, ABAC.

*Answer* FWG continues its effort in supporting women's participation and any improve in respect with gender perspective.

**SOURCE**

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APEC Fisheries Working Group Report to the 2006 Gender Focal Point Network Meeting, Vietnam  
Accessed 14 May 2007,  
[http://www.apec.org/content/apec/documents\\_reports/gender\\_focal\\_point\\_network/2006.html](http://www.apec.org/content/apec/documents_reports/gender_focal_point_network/2006.html)

## **Briefing for fisheries departments on agreements relating to women in the Pacific Islands region**

In order to develop a gender perspective in fisheries:

### **There is a need for more accurate information on the participation of women in all aspects of the fishing and maritime industry.**

Research and data collection in women's participatory roles within the fishing and maritime industry has been identified as crucial for improving the education and promotion of young women into the professional, technical and scientific levels of this industry sector. Recent discussions indicate that there are very few women working in the industry, particularly at senior or high level decision-making positions. While higher levels of participation occur at professional and technical levels, such as research, education, surveillance and legal compliance, the percentage rate is still very low. It is in areas of rural and urban inshore fishing where the highest participation rate of women occurs, particularly in areas of home consumption, subsistence and factory and village production. Research and data collation is thus needed to identify existing gaps and enable informed decisions on how to enhance women's participation rates within the industry.

### **There is a need to value the contribution of women's work in the fishing industry.**

Assessing women's paid and unpaid work (the informal sector) is essential for recognising and locating women's overall contribution to national economies. Continued data collection into unpaid work has been identified as providing an important avenue for increased awareness of this contribution.

### **There is a need to take practical steps to improve capacity gaps.**

Identifying existing serious capacity gaps within the industry is viewed as a practical way to increase and promote women's participatory roles. It is suggested that capacity building be achieved, both short term and long term, through the encouragement of women into training courses and programmes and through the promotion of qualified women into professional, technical and scientific areas where their skills could be easily adapted and better utilised.

### **There is a need to use gender analysis in the ecosystem approach.**

It is recognised that an approach that considers traditional knowledge at local levels is required to supplement science and better effect sustainable and successful resource management. The application of gender analysis enhances this outcome by directing awareness towards the social conditions and impacts necessary for the success of the ecosystem approach.

### **There is a need to involve women's groups.**

Consultation with non-government organisations, community-based organisations and women's community groups has been identified as an important step in the process of planning and implementation within the fisheries and maritime industry. Women's groups



in particular are viewed as a vital source of information and knowledge at a community level and hence their involvement is seen as critical to the success of the ecosystem approach.

**There is a need to improve standards and conditions of the workplace.**

The improvement and adherence of occupational, health and safety standards within the industry has been targeted as an important area that will help lift barriers to women's participation by not only improving women's existing working conditions but also by encouraging more women to work in the sector.

**There is a need to use women as agents of behavioural change.**

Working with women and women's groups is seen as an important step towards effecting substantial behaviour change within the community. Through consultation it is hoped that the often debilitating effects of alcohol abuse, HIV/AIDS, sexually transmitted disease and women's sexual exploitation, all of which are suffered predominantly by women and caused through irresponsible behaviour, will begin to be identified and addressed.

**There is a need recognise cultures and traditions.**

It is vital that women's traditional and cultural roles be recognised. Traditional work, such as food foraging, has often been overlooked and has tended to obscure women's significant participation in creating food security within their communities. More needs to be done in regards to understanding both the limits and agency of these roles to better equip, educate and promote women for future participation within the industry.

**SOURCE**

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Abstracted from the Secretariat of the Pacific Community Coastal Fisheries Programme,  
Accessed 14 May 2007, <http://www.spc.int/coastfish/Reports/HOF5/HoF5GenderInstruments.pdf>

## Gender Responsive Budgets

APEC SOM Gender Analysis Workshop  
Cairns 26-27 June 2007

**Rhonda Sharp**  
Professor of Economics  
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University of South Australia

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## Terminology

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

These terms are used interchangeably, although the term 'gender' rather than 'women' is used as the category of analysis.

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## APEC economies that have undertaken gender budgeting initiatives at the national or subnational levels – 2004

Americas	Asia	Pacific
Canada	Indonesia	Australia
Chile	Malaysia	
Mexico	Philippines	
Peru	Taiwan	
United States (local govt only)	Thailand	
	Vietnam	

Source: Adapted from Rubin and Bartle (2005) who used Budlender (2002) in Budlender and Hewitt (eds) 2002 to compile the table. This does not provide an exact picture of those countries who have implemented an initiative because of information gaps. Inclusion in the table required only minimum evidence of linking gender to the budget.

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### Gender Responsive Budgeting

A gender mainstreaming strategy with the government budget as the entry point.

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### Many entry points to the budget cycle

- **Planning** and formulating the budget
- **Adoption** or execution of the budget by parliament
- **Implementing** the policies and programs
- **Monitoring**, evaluation and audit

The different phases involve different people, knowledges and politics.

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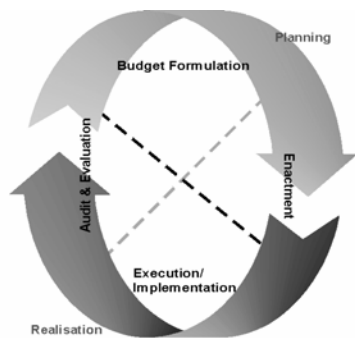
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Source: Sharp, Rhonda (2003) Budgeting for Equity: Gender Budget Initiatives within a Framework of Performance Oriented Budgeting, New York: UNIFEM, page 70.

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### 2 sides to a gender responsive budget

- A systematic examination of budget programs and policies for their different impacts on men and women, boys and girls- **gender budget analysis**
- Decision-making that changes budgets and policies so that gender equality is promoted- **informed actions that bring about change**

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### A gender responsive budget is NOT

- A separate budget for women or men
- Primarily concerned with increasing the amount of monies spent on women-targeted programs (women or gender-specific allocations)

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### Why focus on the budget?

Budgets are important for gender equality:

- Budgets turn policy commitments (paper promises) into concrete programs and projects.
- The budget is a mirror, expressed in financial terms, of the social and economic policies and the development goals pursued by a country.
- Engaging with the budget about gender is to engage with economic policy which often frames what is possible in social policy.

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**Gender responsive budgeting benefits budget and policy decision making and the economy by:**

- assisting in implementing the objectives of budgetary reforms - transparency, accountability and civil society participation - **good governance**
- adding value to results based on performance budgeting systems - **policy effectiveness, equity and efficiency**
- fostering **economic growth** by reducing inequalities - inequities have costs; greater gender equity leads to economic efficiencies
- contributing to **poverty reduction** and the achievement of **international commitments** such as **MDGs**

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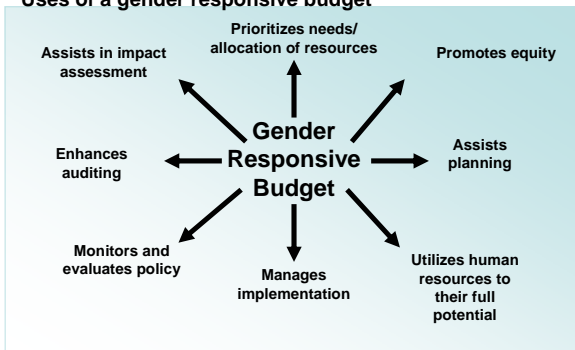
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**Uses of a gender responsive budget**



Ministry of Women, Family and Community Development, Malaysian Government (2005). Manual on Gender Budgeting in Malaysia, p. 5.

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**The myth of budgets being gender neutral**

**Example 1**

In a training workshop in Mexico City it was initially argued by participants that the provision of street lighting was neutral in its impact on men and women.

Is this always the case?

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**The myth of budgets being gender neutral**

**Example of street lighting**

The availability of street lighting can have important impacts on women's personal safety and ability to work night shifts and earn income in areas known for their high rates of violence against women

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**The myth of budgets being gender neutral**

**Example of trade liberalisation**

When the South Australian government introduced the State's 'Women's Budget' The Department of Economic Development initially argued that the main impact of the Australian Federal government's then plans to significantly reduce tariffs on the State's textile clothing and footwear industries would be to increase economic efficiency.

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**The myth of budgets being gender neutral**

**Example of tariff cuts to female dominated industries**

The TC&F industry employed mostly women migrants with little formal qualifications in a State with high levels of unemployment. The effects of the tariff cuts were to increase unemployment, reduce regulated factory employment and increase unregulated outwork. These costs change the economic calculation and the most efficient policy approach.

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**Budgets are not neutral in their impacts on women & men, girls & boys**

- ❖ Budgets tend to impact on women and men differently because our socially defined gender roles mean we do different things, have different responsibilities, contribute different amounts of paid and unpaid work and make different choices.
- ❖ Only if women and men occupied the same social and economic situation could we expect government budgets to have the same or a neutral impact on both women and men.
- ❖ The assumption of gender neutral budgets and policies in the face of a lack of analysis is more likely to equate to 'gender blindness'.

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**How to implement a GBI?**

Guiding principles and useful tools include:

- ✓ Total budget approach
- ✓ Systematically recognise the contribution of the unpaid sphere of the economy
- ✓ Utilise a range of gender disaggregated tools of budget analysis
- ✓ Design a functional framework for relating budgets to gender equality

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**Total budget approach**

- This means all expenditures and revenues are relevant, although in practice the focus has been on the expenditure side of the budget.
- The notion of a total expenditure approach can be illustrated by the following diagram.

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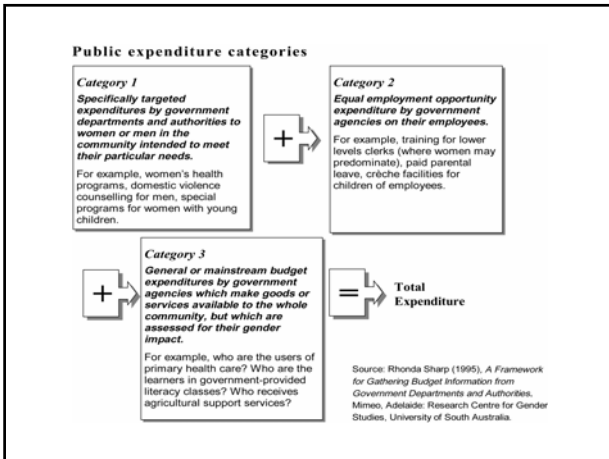
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**1. The whole economy is relevant to understanding the gender impacts of budgets**

In order to understand the gender impacts of budgets and to develop a more gender responsive budget, an understanding of the total productive system is needed.

That is, gender responsive budgets draw attention to both the paid and unpaid productive activities of a country.

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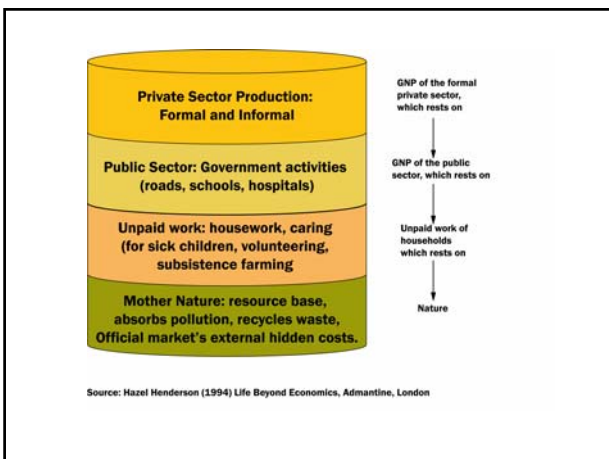
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**Gender budgets draw on a variety of tools of gender analysis**

1. gender-aware policy appraisal
2. gender-disaggregated beneficiary assessments
3. gender-disaggregated public expenditure incidence analysis
4. gender-disaggregated tax incidence analysis
5. gender-disaggregated analysis of the impact of the budget on time use
6. gender-aware medium term economic policy framework
7. gender-aware budget statement

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The five step approach of gender budget analysis		
	Description of step	Budget Team
1	Describes the situation if women and men, girls and boys (and different subgroups, such as rural/urban, age-based, etc) in the sector.	Needs/client analysis
2	Assesses the policy, programs, and projects in terms of their gender sensitivity, i.e. whether they address the situation described in Step 1.	Policy, programme
3	Assesses whether adequate financial (budgetary) and other resources (e.g. staff) are allocated to implement the gender sensitive policy of Step 2 effectively.	Inputs
4	Monitors whether the expenditure allocated in Step 3 is spent as planned.	Outputs
5	Assesses whether the policy, together with the associated expenditure, has promoted gender equity as intended, and changed the situation described in Step 1.	Impacts/outcomes

Debbie Budlender's 5 steps in a gender budget analysis cited in the Ministry of Women, Family and Community Development, Malaysian Government (2005), *Manual on Gender Budgeting in Malaysia*, p. 15.

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**Ways in which GBIs have improved budgetary results**

- ❖ Improvements on the expenditure side of the budget
- ❖ Improvements on the revenue side of the budget
- ❖ Improvements in the budget decision making process
- ❖ Improvements in aid related policy processes
- ❖ Improved statistics and indicators

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### Summary

- Gender responsive budgeting is a gender mainstreaming strategy with the budget as the entry point for gender analysis and decision making.
- Gender budgeting can be implemented at the project, program, policy, sectoral or economy wide levels.
- A number of APEC members have undertaken initiatives to make government budgets more responsive to gender and these can complement the *APEC Framework for the Integration of Women*.

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## **MODULE 4**

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### **Gender analysis of the care economy and the national budget**

At the completion of the module participants will be able to:

- understand the gendered nature of paid and unpaid spheres of the economy and its implications for gender analysis and achieving organizational and national objectives
- identify issues the care economy raises for a gender analysis of projects, policies and budgets
- reflect on ways in which care activities enter projects, policies and budgets in APEC member countries.

## Gender analysis of the care economy and the national budget\*

APEC SOM Gender Analysis Workshop  
Cairns 26-27 June 2007

**Rhonda Sharp**  
Professor of Economics  
Hawke Research Institute  
University of South Australia

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### Recognise the unpaid work of an economy

'The extent to which a country achieves its social and economic objectives depends not only on the amount of paid work that its people do, but also on the amount of unpaid work its people do caring for their family members, neighbours and upon the amount of free time people have for civic duties and leisure'. (Elson 2002:25)

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### Unpaid activities and GDP

#### The System of National Accounts (SNA)

- The SNA contains the rules which tell countries how to calculate GDP.
- What the SNA says must be included in GDP
- *Include:* Paid work in the public and private sector
- *Include:* Unpaid work in family business
- *Include:* Unpaid production of goods, such as subsistence farming
- *Exclude:* Unpaid production of services, such as housework, child care and voluntary work in the community

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- New ways of measuring the economy, such as **time use studies**, have made many gender issues visible, which may have significant implications for policies and their allied resource allocations.
- Making changes to how the economy is measured means that we must also change our macroeconomic models. This, in turn, results in an altered understanding of economic growth.
- Traditionally, measures and models of the economy have treated the household as being primarily a site of consumption and leisure.
- New thinking in macroeconomics recognises that households also contribute to production. One of the central activities of households is to produce goods and services, a large proportion of which can be thought of as making up the care economy- that is the caring of children, aged, sick and disabled.
- While some 'care activities' enter the market (ie are paid) a large proportion is undertaken in households on an unpaid basis. The majority is also undertaken by women.

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**Care activities as productive activities**

***The third-person rule***

- Any activity which you can (theoretically) hire another person to do for you is 'production' or 'work':
- Eating, sleeping and learning are not work
- Caring for children and housework are work

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**Unpaid work**

Unequally shared between men and women  
(65% done by women and 35% done by men in Australia)

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**Gender Differences in Time Use in by Rural Women and Men**

**Table 9 Percentage of time spend by rural Sri Lankan women and men on different activities**

Activity	Wome n	Men
Food preparation	92	8
Winnowing and parboiling rice	100	0
Preserving food for the hungry season	80	20
Storing grain at harvest time	30	70
Production of fruits and vegetables for home consumption	80	20
Fetchng water	98	2
Collecting firewood	65	35
Upkeep of house and yard	95	5
Bringing up children	90	10
Bathing children	80	20
Attending to the sick in the family	85	15

Source: Janet Henshall Momsen (1991), *Women and Development in the Third World*, London and New York: Routledge, p. 38.

Source: Cited in Budlender, D., and Sharp, R., (1998) *How to do a gender sensitive budget*, Commonwealth Secretariat and AusAid: London and Canberra, p. 49.

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The treatment of unpaid work affects the impacts of policies and budgets on men and women.

It raises issues of the efficiency and sustainability of different policies and their funding.

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**Examples of budgetary changes increasing women's unpaid care work**

1. Cutbacks in hospitals (including privatisation) can increase the unpaid work of households (because of shorter hospital stays, less nursing staff to do all the tasks for patients). Reducing costs in the public or private sectors in this way is also false efficiency for the economy -simply transferring costs between sectors.

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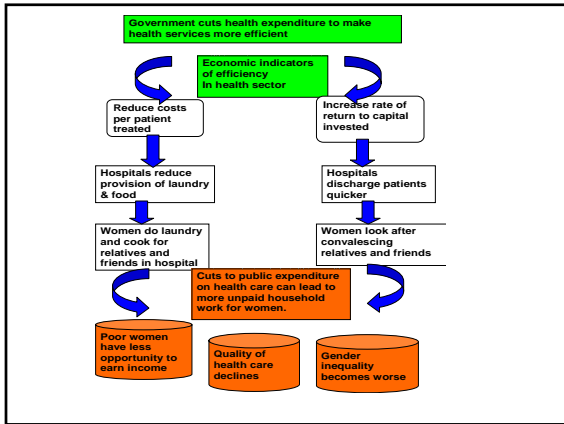
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**Examples of budgetary changes increasing women’s unpaid care work**

2. In Peru a local government ‘glass of milk’ program to increase nutrition was expanded by being designed on ‘self-managing’ principles. The expanded program relied on women’s volunteer labour (733,432 total hours) which, calculated at the value of unpaid wages, amounted to nearly 25% of the government funding for the program.

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**Targeting men to participate in unpaid care work**

- If budgets and policies only encourage women to be productive then their time burdens are likely to increase. Evidence indicates that men make a positive contribution to gender equality and development when they are actively involved in their children’s lives.
- Redistribution benefits of budgets and policies more equitably to both men and women increases men’s support for gender equality and potentially reduces women’s unpaid care work.
- Also, while men are often the dominant household decision-makers they can be overlooked in budgets and policies designed to improve the conditions of women and children. This can reduce the equity, effectiveness and efficiency of such programmes.

Source: UNICEF 2007 Report on the State of the World’s Children: Women and Children the Double Dividend of Gender Equality, NY: UNICEF, pp 81-83.

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**Targeting men can reduce women's time burdens and increase equity and efficiency**

- In Vietnam UNICEF has targeted men in an education program about the use of basic health prevention measures in the care of infants and children. The result was an 47000 men participated and a 60% increase in use of oral rehydration salts to treat diarrhoea and increase immunisation coverage of children in one year.
- Sweden has redistributed the leave benefits for caring for children. Over the last decade increasing the availability of paternity leave for men has increased fathers responsibility for childcare to 45%.

Source: UNICEF 2007 Report on the State of the World's Children: Women and Children the Double Dividend of Gender Equality, NY: UNICEF, pp 61-63.

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#### **Exercise 4.1: Gender differences in time use exercise**

##### **Objectives**

- to increase participants' awareness of women's and men's full contribution to the economy, including their participation in the informal sector(s)
- to identify the gender discrimination in household activities.

##### **Explanation:**

Time use surveys are important statistical tools for providing data on men's and women's contribution to national economies. In particular, they help identify, measure and value women's work both at home and in the labour market. The data obtained through time use surveys can be used to improve national account estimates and implement gender, family and employment policy. In this exercise participants are asked to consider and measure time use in their own work, leisure and cultural activities.

##### **Materials:**

Time use spreadsheet

##### **Time:**

20 minutes

##### **Instructions:**

- 1 Each participant is required to write down a list of activities undertaken within a 24-hour time span. Each activity needs to be identified as either paid or unpaid as well as how much time is allocated to that particular activity. Consider what this pattern would look like if participants had recorded their activities for one week by multiplying by 7 days.
- 2 In groups of 4-5 discuss what each participant observes about their own time use pattern and the time use pattern of others within the group.

## Time use spread sheet

Activity	Paid	Unpaid	Time per day (mins)	Time per week (mins)

## **Exercise 4.2: Unpaid care activities, policies and budgets in APEC economies**

### **Objective**

- to reflect on ways in which unpaid care activities enter projects, policies and budgets in APEC member countries.

### **Explanation**

Many countries have policies and funding to support a range of unpaid care activities such as child care for working parents, payments for children, paid and unpaid maternity and parental leave, tax concessions for dependant spouses and equality of compensation and sharing of marital assets in the event of divorce and subsidies (energy, water) to support household activities. This exercise aims to draw out the different approaches to unpaid care activities and their implications for gender equality.

### **Materials**

Cards

### **Time**

20 minutes

### **Instructions**

- 1 Participants to form pairs
- 2 Each pair draws 2 or more blank cards
- 3 Participants are asked to write on the cards examples from their own APEC economy where policies and budgets have visibly supported the quantity or quality of unpaid care activities
- 4 Cards are posted out the front and two participants are invited to group and categorise the response cards
- 5 The different categories are highlighted and a group of cards are given to each of the participant groups for them to use as a basis for discussion and report back on making unpaid care more visible in policies and budgets and the reasons for doing so.



## **MODULE 5**

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### **Tourism case study in gender sensitising policies and budgets**

At the completion of the module participants will be able to:

- identify a range of gender issues, and their cross cutting nature, in the tourism policies and budgets of APEC members
- demonstrate teamwork and communication skills
- apply gender analysis to tourism policies and budgets.

## **Tourism – an ‘economic driver’ for APEC economies.**

Sustainable tourism is promoted by APEC as an important ‘economic driver’ for the Asia-Pacific region, and is recognised for its impact on:

- creating socio-economic growth
- reducing poverty
- eliminating hunger
- boosting employment for local communities
- raising awareness of respect and preservation of the natural environment
- fostering community participation
- encouraging the exchange of cultural heritages
- ‘bridging the gaps’ among APEC member economies.

Since the first Tourism Ministerial Meeting held in the Republic of Korea in 2000, APEC Leaders have aimed to realise and build upon the four initial goals set out in the APEC Tourism Charter. These goals include:

- removing impediments to tourism business and investment
- increasing mobility of visitors and demand for tourism goods and services
- sustaining management of tourism outcomes and impacts
- enhancing recognition and understanding of tourism as a vehicle for economic growth and social development.

In 2006, Ministers at the fourth APEC Tourism Ministerial Meeting hosted in Viet Nam commended recent projects undertaken to build tourism in the region and ushered in a new ‘co-operative perspective’. Aimed at further intensifying bilateral and multilateral cooperation among member economies the new initiative promoted a ‘shared vision’ ideal, designed to achieve ‘stability, security and prosperity’.

### **2006 APEC TOURISM MINISTERIAL MEETING: FACTS, FIGURES AND INITIATIVES FROM SOME APEC MEMBERS**

The Tourism Minister for **Philippines** identified that tourist arrivals in the Philippines had increased by 14% over the last 3 years, with visitor traffic reaching 2.62 million in 2005 and an expected 3 million in 2006. To promote Central Philippines as ‘the premier tourist destination of the country’ and to meet the increased flow of international visitors, the Philippines’s Government recognised the need to improve infrastructure, such as roads, new airports and seaports, and combined this with increased investment in tourism facilities and services. Such initiatives were seen as a commitment to APECs tourism policy and a step towards implementing an ‘individual action plan’ that met investment liberalization and facilitation. The Minister urged greater technological support and transparency from developed member economies, believing that both would aid the tourism modernization process within developing countries.

In **Japan** a combined strategic initiative, called the ‘Visit Japan Campaign’, was recently undertaken between the Japanese government and private sectors intended to increase the number of tourists visiting Japan each year. Although the number of foreign tourists

visiting Japan increased by 10% in 2005, reaching 6.7 million, a series of measures have been employed to reach the target number of 10 million tourists per annum by 2010. Other initiatives undertaken include promoting tourism exchanges and cooperation between neighbouring countries, such as China and the Republic of Korea and promoting a youth exchange and a sister/friendship city exchange.

**China** identified an increase across the board in tourism in 2005 with a monetary value of 97.3 billion US dollars, a 12% increase from 2004. Inbound tourists increased by 10% (totally 120 million dollars), outbound travel increased by 8% (totally 31 million), overnight tourists arrivals reached 46.81 million (an increase of 12%) while foreign exchanges reached 29.3 billion (an increase of 14%). The Chinese Minister has identified the importance of such growth in creating labour, upgrading industry and enhancing key production factors. He also acknowledged that challenging factors, such as natural disasters, the avian flu and surging international oil prices, confront tourism within the Asia-Pacific region today, but believes that some of these problems and crises can be partially alleviated through the successful promotion of cooperation and exchanges between member economies.

The Minister from **Chile** presented his country's 'way forward' with tourism, citing an 'ambitious' 2006-2010 Tourism Action Plan aimed at increasing current inbound tourist numbers from 2 million to 3 million by 2010. The plan aims to 'generate' an improved environment for tourism, develop the capabilities of public agencies, implement management models throughout the country, increase the international promotions budget, implement a National System that enhances the quality of tourism services and strengthen the government's role in social tourism.

#### **SOURCE**

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2006 APEC Tourism Ministerial Meeting, 'Hoi An Declaration on Promoting APEC Tourism Cooperation', Hoi An, Quang Nam, Viet Nam 17, October 2006, Accessed 20 May 2007, [http://www.apec.org/apec/ministerial\\_statements/sectoral\\_ministerial/tourism/06.html](http://www.apec.org/apec/ministerial_statements/sectoral_ministerial/tourism/06.html)

4<sup>th</sup> Tourism Ministerial Meeting – Retreat Hoi An, Quang Nam, Viet Nam 15 -18 Oct 2006, Accessed 20 May 2007, [http://www.apec.org/apec/documents\\_reports/tourism\\_ministerial\\_meetings/2006.html](http://www.apec.org/apec/documents_reports/tourism_ministerial_meetings/2006.html).

### **Exercise 5.1: Gender issues in tourism**

#### **Objective**

- to identify a range of gender issues in increasing tourism among APEC members.

#### **Explanation**

This is a brainstorming exercise with participants taking on the role of different government ministries and non-government groups. It is the first stage of a role play whereby different ministries will put a case for funding a tourism initiative that has a gender perspective integrated into it.

#### **Materials**

Flipchart for each group

#### **Time**

30 minutes

#### **Instructions**

- 1 Participants join their assigned ministry or NGO.
- 2 Drawing on the relevant background documents and the experience of their own economy, participants brainstorm potential gender issues in increasing the number of tourist visits to a country from the perspective of their ministry or NGO.
- 3 Groups report back the issues using the flipcharts provided.



## **Tourism and equity issues**

While tourism is seen as an easy means to generate revenue, income and employment and create growth within the manufacturing and agricultural sectors, it also places great strain on local infrastructure and has certain implications for the lives of local peoples, particularly for the well-being of women.

All women from peasant women, indigenous women, working women, old women, young women and girls and women who head household are affected to different degrees by tourism development.(5)

Significant gender-bias and inequality in access to resources and employment encumber and constrain many women, leaving them vulnerable and unable to fully enjoy the assumed benefits of tourism development.

The impact of tourism on women can be broken down into four categories:

- **Formal sector employment in tourism-related industries-** the quality and type of work available to women within this sector is heavily influenced by sex stereotyping and sex segregation. As a result women dominate menial, semi-skilled, domestic and service type occupations, which are generally low paid, insecure and lack long-term potential.
- **Informal sector actives and sustainable livelihoods-**the informal sector is dominated by women who provide services such as washing clothes, trading and cooking for tourists. Although women may gain some form of autonomy through the production and marketing of ethnic handicrafts, men generally control the wholesaling of these products in urban centers.
- **Sex tourism-**women are increasingly being exploited as ‘sexual playthings and earners of foreign exchange in prostitution’. Many women and young girls are being forced into sex work and are left vulnerable to the numerous associated health problems and hazards arising from this particular trade.
- **Women’s influence and decision making around tourism development policy-** tourism impacts greatly on women’s social and economic status, economic empowerment, social reproduction and responsibilities and access, ownership and control over resources. While tourism can increase access to basic services and increase women’s financial autonomy, it can also add to women’s reproduction burden and divert resources from social budgets to the tourism infrastructure.

### **SOURCE**

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Miriama Williams. 2002, ‘Tourism Liberalization, Gender and the GATS’, *Economic Literacy Series: General Agreement on Trade in Services*. Accessed 25 May 2007, [http://www.igtn.org/pdfs/37\\_GATStourism.pdf](http://www.igtn.org/pdfs/37_GATStourism.pdf)

## **Singapore best practice tourism**

The establishment of Banyan Tree Gallery, a retail arm of the Banyan Tree Hotels and Resorts, has been recognized for adding a 'social dimension' to tourism. Many women living in Thailand, Cambodia and the more impoverished parts of Indonesia, have been able to sell their handicrafts through the gallery. This employment has had a three-fold effect for the women:

- It has provided a reasonable income (with some earning more than their fishermen husbands).
- It has meant that they have not been forced into a life of slavery and prostitution.
- It has enabled many to work side by side with their husbands while supervising children.

### **SOURCE**

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APEC Secretariat, 2006. Best practices in sustainable tourism management initiatives for APEC economies, pp. 70-75, Accessed 28 May 2007,  
[http://www.apec.org/apec/publications/all\\_publications/tourism\\_working\\_group.html](http://www.apec.org/apec/publications/all_publications/tourism_working_group.html)

## **Exercise 5.2: Presentation to the budget committee role play**

### **Objectives**

- to develop skills in gender analysis of national tourism policies and APEC projects and fora
- to develop an understanding of the budget and policy processes that shape gender outcomes.

### **Materials**

Ministry identifiers  
Instruction cards  
Handout on country Touraround  
Background documents

### **Explanation**

This role play in justifying a budget bid follows on from the previous exercise where gender issues were identified from the perspective of different ministries and NGOs. Each ministry will be asked to argue their case for a budget allocation on the grounds of the benefits that accrue from proposals that have integrated a gender perspective.

### **Time**

60 minutes

### **Instructions**

- 1 Participants join the ministry and NGO groups of the previous exercise. In addition, members of the Budget Committee of the country 'Touraround' are also identified.
- 2 Participants are asked to read the handout to situate the budget and tourism project and goals of country Touraround.
- 3 Ministries are invited to put in a budget bid within the guidelines of the Touraround tourist programme. Ministries may collaborate on a budget bid.

The proposal needs to include:

- a brief description of the proposal, stakeholders and partners
- a gender analysis that includes:
  - a the equity problem that is being addressed
  - b why it is important to address this problem
  - c the strategy for addressing it (including who will be responsible)
  - d the anticipated gender impacts of the proposal
  - e a performance measure of outputs and outcomes for assessing the benefits of the proposal in the future
  - f a funding allocation (recurrent/capital: year 1-year 3; partner funds)

- 4 Ministries and NGOs are to read their individual instruction cards.
- 5 Ministries present their proposal and supporting arguments to the Budget Committee
- 6 The Budget Committee selects the best proposal.

### **Exercise 5.3: Debriefing the role play exercise**

#### **Objective**

- to provide a forum for discussing the what participants gained from the role play.

#### **Explanation**

Role plays have an increased capacity to help us understand real world situations if time is spent on debriefing what was observed and experienced during the role play

#### **Materials**

Whiteboard or computer for taking notes on participant responses

#### **Time**

30 minutes

#### **Instructions**

Participants discuss in groups the following questions:

- What did you observe or experience from undertaking the role play?
- In what ways did it give you an insight into the 'real world'?
- In what ways did the role play significantly differ from the 'real world'?
- Would you change anything about the exercise?

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## **Conclusion**

### **Exercise 6.1: Taking gender analysis forward**

#### **Objective**

- At the completion of the module participants will be able:
  - identify ways in which participants might take gender analysis forward in their workplaces and communities.
  - to undertake an assessment of the role of gender analysis in APEC and the ways in which this may be strengthened.

#### **Explanation**

An analysis of the strengths, weakness, opportunities and threats in integrating a gender perspective in the activities of APEC will be undertaken as a way of summing up how participants see the current situation and how they perceive gender analysis might be taken forward.

#### **Materials**

Worksheet provided below

#### **Time**

30 minutes

#### **Instructions**

- 1 Participants are assigned to groups.
- 2 Participants spend 10 minutes brainstorming the strengths and the weaknesses and share their points with the wider group.
- 3 Participants spend 10 minutes brainstorming the opportunities and threats and report back to the wider group.
- 4 In the light of the SWOT analysis each participant identify and report back on one strategy that might be used to forward gender analysis in their workplace/community.

**SWOT analysis for integrating a gender perspective in APEC activities**

<p><b>STRENGTHS of APEC and its members in gender analysis</b></p>	<p><b>WEAKNESSES of APEC and its members in gender analysis</b></p>
<p><b>OPPORTUNITIES in APEC for integrating a gender perspective</b></p>	<p><b>THREATS to integrating a gender perspective in the current APEC environment</b></p>

