



## **MODULE 1**

*The trade and gender debate:  
Concepts, definitions and analytical frameworks*

## 1 Introduction

Before starting any kind of research, there are three basic questions that need to be answered: (a) What is the topic I want to examine? (b) Why is it important to investigate it? (c) How can I carry out my analysis? In this introductory module, we aim to provide an answer to each of these questions and thus set the stage for the analysis in Modules 2 and 3.

Over the last 30 years, globalization has contributed to increased cross-border flows of goods and services, capital, technology, and information. The prevailing assumption during this period has been that the lowering of economic, geographic and cultural barriers would lead to higher levels of productivity and expanded employment opportunities from which everybody would benefit. Economic policies were often designed on the assumption that market forces would automatically ensure these outcomes would be realized.

With the adoption of the Millennium Declaration in 2000, the discourse in international development has shifted to the Millennium Development Goals (MDGs) as an overarching framework for development. With regard to trade, the Doha Round of multilateral trade negotiations, launched in 2001 with a strong emphasis on development, contributed to challenging the view that globalization would consequentially lead to economic growth and development for all. Indeed, a key feature of the last decade's economic development is a disconnection between economic growth and social development: income disparity, social inequality and exclusion have increased even in countries that have recorded high levels of economic growth and remarkable trade performance. It has become increasingly evident that economic policies impact different segments of the population, including men and women, in different ways; the assumption that economic policies are "gender neutral" has been increasingly challenged and it has also become clear that economic policy, including trade policy, can play a critical role in narrowing the gender gap only if policymakers consciously take into account these horizontal differences (UNCTAD, 2012).

Country-based research, including research conducted by UNCTAD, has shown that the different roles played by women and men in society and in the economy have repercussions on countries' trade performance and outcomes, as well as on women's and men's ability to take advantage of the opportunities emerging from expanded trade.

Adopting a gender perspective contributes to a deeper and richer understanding of trade performance and brings new insights into trade policy analysis. Firstly, a gender perspective challenges the prevailing aggregate focus of conventional trade policy analysis which overshadows the redistributive effects of trade at the country level. Secondly, a gender perspective is instrumental in bringing to the forefront of the analysis the intersecting patterns of inequality – including inequalities of income and wealth, as well as horizontal differences rooted in race/ethnicity/caste or spatial location – that would otherwise be overlooked in mainstream trade policy analysis. Finally, by delving deep into social norms and power relations, the gender approach integrates social and cultural factors into economic analysis. This, in turn, encourages a shift from formal models to real life economics. In sum, the gender perspective provides a framework for reassessing macroeconomic policy, and trade policy in particular, in ways that magnify their social meaningfulness and inclusiveness (UNCTAD, 2012).

This teaching material explores the consequences of trade for women's economic empowerment and well-being and the impact of gender inequality on trade. Since the economy is a gendered structure, any impact of trade on the economy is likely to have gender-specific repercussions. Looking at countries' socio-economic structure through a gender lens is therefore the general framework, which will be described in Section 2. Sections 3 and 4 will then discuss some key concepts and issues in this area, paving the way for analysis in the following sections. Specifically, Section 3 will present a set of key indicators for measuring gender inequality and provide the reader with the necessary tools to understand which indicator is more appropriate to use depending on the purpose of his/her study. Section 4 will explore different definitions of trade used in research and policymaking, as well as provide some clarifications on how we use the term "trade" in this teaching material. After tackling these introductory definitions, the analysis will turn to the core issues at stake in the trade and gender debate. Section 5 will present the multiple channels of interaction between trade and gender. Section 6 will then look at the country case study of Angola, with the objective of applying the previously presented theory to some hard data, as well as providing an initial insight and empirical evidence on the trade and gender debate. The final section (Section 7) will introduce the notion of "mainstreaming gender into trade policy": its meaning in practice, challenges encountered and the steps that need to be taken for trade policy to fully acknowledge and address gender-based

inequalities. The module will conclude with exercises and questions for discussion.

At the end of this module, students should be able to:

- Identify topics related to the trade and gender relationship and understand why and when it is important to investigate them;
- Explain why the economy is a gendered structure and describe its main constitutive elements;
- Compare the strengths and weaknesses of different indicators of gender inequality and identify relevant data sources;
- Understand the difference between “trade” and “trade policy” as well as define and compare different measures of trade;
- Describe the main channels through which gender and trade interact while understanding that the trade and gender relationship is a bi-directional one;
- Understand and gain confidence with the use of a range of different gender analysis frameworks;
- Define the concept of “mainstreaming gender into trade policy”.

## 2 The economy as a gendered structure

Before delving into the trade and gender debate it is important to clarify the ways in which “gender” and the “economy as a gendered structure” are conceived in this teaching material.

Gender is a system of norms and practices that ascribe particular roles, characteristics and behaviours to males and females based on their sex and generally assign those born female a subordinate status in society. These differences are socially constructed rather than based on any “natural” distinctions and they structure social, economic and political power relations between persons of different genders within the household, the market and society at large. According to UN Women,<sup>1</sup> gender is defined as: “the social attributes and opportunities associated with being male and female and the relationships between women and men and girls and boys, as well as the relations between women and those between men. These attributes, opportunities and relationships are socially constructed and are learned through socialization processes ... [and are] context/time-specific and changeable ... In most societies there are differences and inequalities between women and men in responsibilities assigned, activities undertaken, access

to and control over resources, as well as decision-making opportunities. Gender is part of the broader socio-cultural context. Other important criteria for socio-cultural analysis include class, race, poverty level, ethnic group and age.”

Our analysis in this teaching material focuses on gender biases that prevent women from accessing the same kind of economic, social and political opportunities as men. With the term gender inequalities we refer to the “equal rights, responsibilities and opportunities of women and men and girls and boys” and recognize that gender equality implies that the interests, needs and priorities of both women and men are taken into consideration and that equality between women and men is a human rights issue and as a precondition for, and indicator of, sustainable people-centred development.<sup>2</sup> With the term gender inequalities we therefore refer to the concrete manifestations of gender bias that create disadvantages for women (e.g. lower wages); with the term gender equality we refer to situations where men and women receive equal treatment (e.g. equal pay for equal work).

By understanding the economy as a “gendered structure”,<sup>3</sup> we explicitly acknowledge and identify the gendered power relations that underpin the various institutions, transactions and relations that make up the sphere of the “economy”. That is, we view the economy as part of a system of social relations in which gender is already inscribed, though gender relations within that system can also be transformed and made anew. For example, gender-based discrimination in labour markets is rife and means that women can access only a limited range of occupations and that wages paid to them underestimate their contribution. This is not only a breach of basic labour rights but also makes it harder for a country to take advantage of the full productive capacity of its current and future workforce.<sup>4</sup> Similarly, when women gain access to employment and income, it may lead to greater power and say in the household and therefore mitigate some gender inequalities.

The first step in looking at the economy through a gender lens is to make visible the unpaid household-based work of caring for others that is vital for the continued functioning of the market-oriented economy. Gender-aware economists draw attention to the fact that goods and services required for adequate living standards are produced not only through market work but also through many hours of unpaid labour spent on cooking and cleaning, collecting water and fuel, and taking care of children, the elderly, ill and able-bodied adults.<sup>5</sup> This unpaid labour is vital

for the functioning of the paid economy though it remains invisible. It has therefore been proposed that the boundaries of the economic system should be broadened to include both market and non-market dimensions. Understanding the interdependence between non-market activities (alternatively termed “reproduction” or also “unpaid care work”) and market activities (or “production”), and the gender division of labour within these, constitutes the starting point for any gender-aware economic analysis.

Gender-based norms about what is men’s and what is women’s work mean that women are expected to take on the bulk of caring responsibilities (Razavi, 2007). This implies that women (much more than men) have the double burden of participating in both paid and unpaid work. This dual role has often the effect of undermining women’s position and negotiating power in the paid labour market, and jeopardizes their access to credit and other productive resources. For instance, it can make women seek jobs that offer flexible arrangements, such as informal<sup>6</sup> and part-time jobs, so that they can combine work with care responsibilities. But because informal and part-time jobs usually pay lower wages than formal and full-time jobs, women often have little incentive to engage in paid work, which reinforces their participation in unpaid household/family work (Higgins, 2012). Consequently, women become more vulnerable within their own families because, for example, they are more dependent on their husband’s income.

The second step of a gender-aware analysis is to identify and analyse how gender bias operates and affects women in the multiple roles they play in the economy. Typically, women in the economy are workers and producers, traders, consumers (and users of public services), and tax payers. Of course, women play several roles in parallel and are therefore exposed to different forms of gender inequality that may reinforce each other, putting women at a disadvantage in the market economy (see Table 2 for a summary of these roles and the corresponding gender bias affecting women). In Sections 2.1 to 2.4, we explain and give examples of the operation of gender biases in each of these roles and make brief reference to data sources whenever possible. However, we leave more detailed discussion of gender indicators and data issues to Section 3.

## 2.1 Women as workers and producers

Women can participate in the economy as workers and producers. In order to understand the gendered structure of an economy and the type of gender bias women have to deal with in these

economic roles, we need to first identify the sectors (agriculture, manufacturing or services) where women and men work and, secondly, what their employment status is (e.g. self-employed, wage employee or contributing family worker).

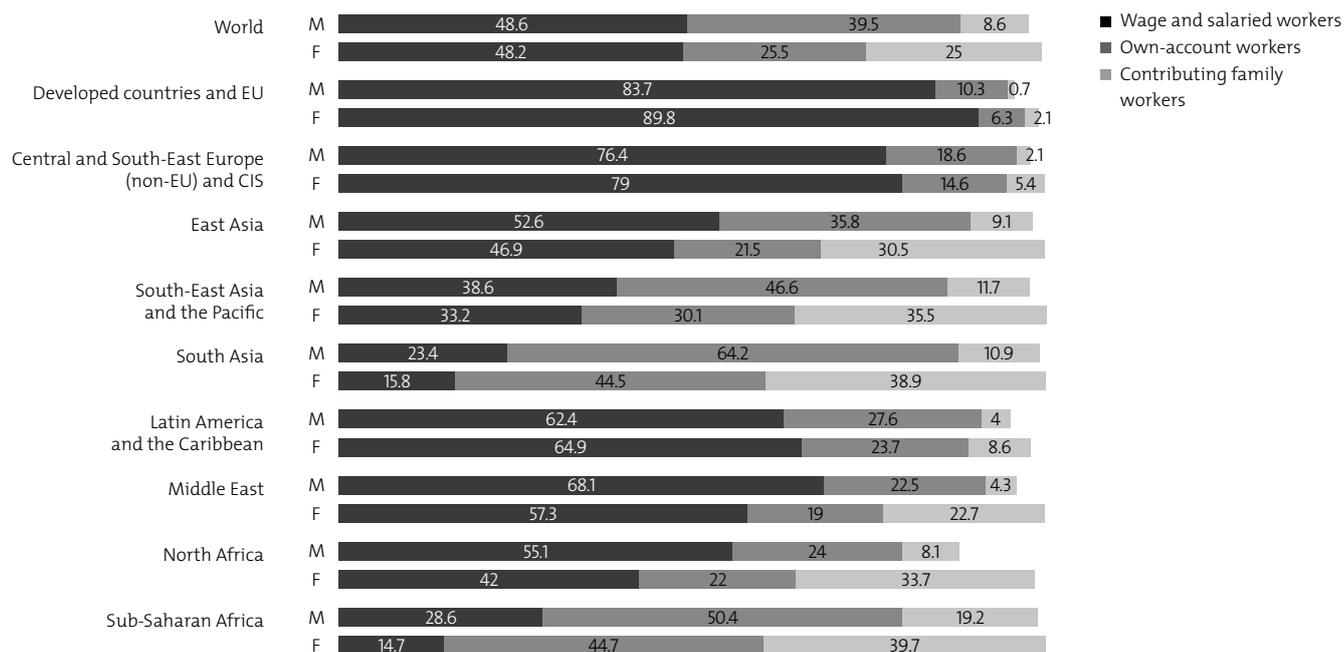
Despite some variations across regions and countries, women not only tend to be concentrated in fewer sectors (“horizontal gender segregation”)<sup>7</sup> – such as food production in agriculture, textiles and garments in manufacturing, and domestic as well as other social services – but they are also underrepresented in power and decision-making positions (“vertical gender segregation”).<sup>8</sup> Conversely, men are more evenly distributed across a wider range of occupations and productive activities (World Bank, 2012).

Women are also more likely than men to be found in precarious forms of work. The International Labour Organization (ILO) is a good source of global data on these patterns. Figure 1, taken from the report on women’s employment trends (ILO, 2012), shows for instance that, in all regions of the world, women constitute a larger share of “contributing family workers”.<sup>9</sup> This gender difference is particularly marked in South Asia, where unpaid family work accounts for 39 per cent of women’s employment compared with 11 per cent of men’s, and in sub-Saharan Africa, where the corresponding figures are 40 per cent for women and 19 per cent for men. A contributing family worker is the most vulnerable form of employment, as his/her status implies no independent access to income.<sup>10</sup>

In the same vulnerable position are unpaid (household) female workers, who are also included in the category of women as workers and producers. Responsibility for food preparation, water and fuel collection, housework, as well as child and elderly care, falls disproportionately on women’s shoulders all over the world. For example, Budlender (2008) shows that in India, women spend on average 354 minutes every day on housework and childcare, as compared to men who only spend 36 minutes on it. For Tanzania, the corresponding figures are 270 minutes for women and around 50 minutes for men. The burden of unpaid work is particularly heavy for rural women in remote areas, due to poor physical infrastructure. As mentioned above, this is likely to limit the ability of these women to contribute to paid productive activities and it increases the probability that they will be involved in informal low-return forms of employment (World Bank, 2007). The most used source of information on unpaid work are time use surveys (TUS).

Figure 1

**International distribution of total employment by status and sex, 2012 (per cent)**



Source: ILO (2012).

Note: EU stands for European Union; CIS stands for Commonwealth of Independent States.

Box 1

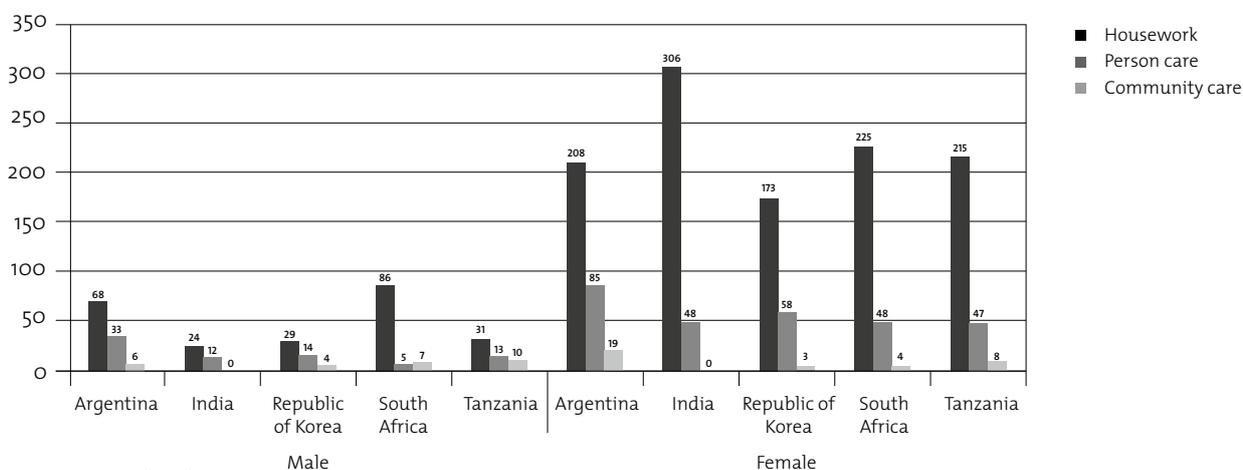
**Time use surveys**

Information on the time spent on providing unpaid services for the family and neighbours can be gleaned from time use surveys, which are carried out in a growing number of developing countries (see Figure 2). TUS generally measure all types of unpaid work, with a good level of detail both for the activities recorded and the socio-economic characteristics of the people undertaking them (such as whether they live in rural areas or not, and what their levels of income and livelihood strategies are). TUS-based analysis could be used to guide decisions on how to prioritize sectoral allocation of public expenditures and strengthen gender-sensitive policies in key sectors, such as agriculture commercialization, infrastructure and employment. With a few exceptions (such as the Republic of Korea and Mexico), however, developing countries' TUS are currently available only for one point in time, which limits their usefulness for analyses of economic changes over time. Small-scale qualitative research at the grassroots level may offer helpful insights when other statistics are lacking.

Source: UNCTAD Secretariat.

Figure 2

**Average time (minutes) per day spent on unpaid care work, by sex, selected countries**



Source: Budlender (2008).

Note: The data used vary according to when the countries at stake did the time use surveys: Argentina in 2001, India in 1998/99, the Republic of Korea in 2004, South Africa in 2000, and Tanzania in 2006.

Women’s restricted time availability implies that they face greater disadvantages than men in responding to new economic incentives, especially in their role as workers and producers. Women are also found to produce less than men because of their limited access to productive resources (e.g. credit, land and inputs). Empirical evidence from different countries shows that female farmers are as capable as their male counterparts; however, because of fewer entitlements to land and limited access to inputs, they become less efficient and produce smaller quantities of crops (FAO, 2010). Table 1 shows that in most African countries and half of the Asian countries, women are disadvantaged by statutory and customary law in their right to own and inherit land. With regard to credit, women tend to receive only small loans since they have

limited or no collateral and therefore often remain trapped in low-value activities that may help them in meeting their practical needs but do not widen their opportunities or favour capital accumulation (UNDAW, 2009). With regard to education and vocational training, women and girls have fewer opportunities than men and boys to develop skills because boys are more likely to be sent to school than girls, who often stay at home to help within the household. At a later stage, vocational training, including agricultural extension services, may not fit women’s time schedule and preclude their participation in it. Women’s lower education and knowledge, in particular in cutting-edge technical fields, limits their upward mobility for employment opportunities when the economy moves up the technology ladder.

Table 1

**Number of countries with gender inequality related to inheritance rights and entitlements to ownership of land and other property, by region**

	Inequality related to inheritance rights	No/limited right to acquire and own land	No/limited right to own property other than land
<b>Africa (48)</b>	<b>45</b>	<b>43</b>	<b>35</b>
Northern Africa (5)	5	3	1
Eastern Africa (15)	13	13	12
Middle Africa (8)	7	8	8
Southern Africa (5)	5	5	4
Western Africa (15)	15	14	10
<b>Asia (42)</b>	<b>25</b>	<b>21</b>	<b>19</b>
Central Asia (5)	2	2	2
Eastern Asia (4)	0	1	0
South-East Asia (10)	4	2	1
Southern Asia (8)	7	7	7
Western Asia (15)	12	9	9
<b>Latin America and the Caribbean (22)</b>	<b>2</b>	<b>5</b>	<b>2</b>
Caribbean (6)	2	1	1
Central America (6)	0	3	0
South America (10)	0	1	1
<b>Oceania (2)</b>	<b>0</b>	<b>2</b>	<b>2</b>
<b>Eastern Europe (9)</b>	<b>2</b>	<b>2</b>	<b>1</b>

Source: UNDESA (2010).

Note: The numbers in brackets indicate the number of countries reviewed. The quality of women’s ownership rights was graded from 0 meaning “no restrictions” to 1 signifying complete discrimination against women. Variations between 0 and 1 may indicate the extent of restrictions or the size of the group of women for which the restrictions may apply. Countries presented in the table are those with partial (graded 0.5) or complete (graded 1) discrimination against women on the issue considered.

**2.2 Women as traders**

Women in developing countries actively participate in informal cross-border trade<sup>11</sup> and in those countries where women do not face specific barriers to their mobility, they constitute the majority of street traders and vendors.

Women who own and run micro, small and medium-sized enterprises (SMEs) also fall into this category.

Women as informal cross-border traders face gender-related barriers because of cultural norms that may determine which modes of

transportation are appropriate for women. Gender differences exist in the perception, availability and use of many means of transport, especially in developing countries. Women's control even over simple means of transport, such as bicycles, animals and carts, may be limited. This imposes an obstacle on women to reach markets where their products can fetch fair prices and conditions in a timely manner. In Uganda, for example, it was found that only men could use bicycles, allowing them to travel and trade outside the village, something that women were not able to do then (Malmberg Calvo, 1994). A project in Tamil Nadu, India, introduced bicycles in the 1990s as a way of promoting women's literacy. It was found that bicycles empowered women and changed their lives because they were able to get quicker access to schools, hospitals, and markets. In addition, gender roles changed as women could undertake tasks such as marketing, taking children to school, and running errands typically done by men. Moreover, bicycles allowed women to complete their tasks faster and more easily, freeing time for other activities (Starkey *et al.*, 2002). Female informal cross-border traders may also face harassment by customs officials. As a result, they often get an unfair deal both as sellers and as buyers.

Women street vendors and owners of micro and small enterprises tend to be at a disadvantage compared to men in terms of having less education and bargaining power, and less access to productive resources and market information and networks. Women entrepreneurs often have different responsibilities, goals and business strategies than men. Obligations related to the well-being of the household place extra demands on their time and income. Even when programmes targeting small businesses are available, often they do not sufficiently take into account the needs and local realities of women entrepreneurs. This is why businesses run by women tend to remain small and generate little income, undermining their potential for growth. Considering that in developing countries SMEs are important for generating employment and make up a large share of economic activities, the fact that businesses run by women often remain micro-businesses that are unable to grow and upgrade technologically jeopardizes the growth prospects of the whole economy.

In street trading environments, there is a general lack of health and safety standards. Women often need to travel long distances to access health services; thus, their opportunity cost in terms of lost earnings increases when seeking treatment. These poor conditions, coupled with women's higher household workload, increase women's exposure

to work-related risks, including those related to stress and ill health. As informal workers, women street traders and vendors are also excluded from the protection of labour legislation and are often unable to access formal social protection measures, such as insurance, disability, maternity and unemployment benefits (Lee, 2004).

Sex-disaggregated data on access to markets and other networks are less readily available and not found in standard surveys. Case studies of particular regions or countries and sector-specific gender value chain analyses (of women's involvement in the various stages of production and distribution of a particular commodity relative to men's) are an underutilized source of information for capturing some of these important dimensions.

### 2.3 Women as consumers

Women in developing countries play an important economic role as consumers: they purchase food and other goods for their families and use public services. Any economic shock resulting in changes in the relative price of necessities and in the provision of essential public services is therefore likely to have a different impact on female and male household members.

Women's contribution to the economy as caregivers means that women essentially buy goods that provide sustenance for the home and family. While a large share of men's income is often devoted to products that Darity (1995) defines as "pure luxury items", women's consumption basket is mainly made up of food products. A change in economic policy that increases food prices means, for example, that women can purchase a smaller amount of food products with a given income. This has consequences for the well-being of the family generally, but particularly so for girls since food may be unequally distributed among male and female members of the family. Collier and Appleton (1995) note that in northern India boys are favoured over girls in terms of food allocation. Smaller quantities of food available in the household can result in higher risk of nutritional deficiencies and ill health for female members.<sup>12</sup>

If an economic shock derives from a change in trade policy, such as a change in tariffs, women will be affected according to: (a) how much influence trade policy has on the domestic prices of imported goods; and (b) their degree of exposure to various imported goods. Module 2 investigates this impact in detail and describes the transmission mechanisms from tariff changes to women's well-being.

Women are also consumers of public services. A change in government revenues – which may be the result of tariff reduction or elimination pursued within the framework of trade agreements – is likely to have gender-specific effects if it impacts the size and composition of public expenditure, e.g. if public services are cut. The privatization of public services pursued unilaterally or in the framework of trade agreements may also lead to higher prices or to the unavailability of such services in remote areas where services provision may prove unprofitable.

The provision of essential services – health and education services, as well as electricity, sanitation and water infrastructure – are likely to favour vulnerable groups the most (if appro-

priately designed and targeted). Gender-aware research, mostly on the early episodes of structural adjustment (see Box 2), has highlighted the greater adverse effects of cuts in public spending on women compared to men (Gladwin, 1991; Elson, 1991). Elson (1991) reported for example that, in Zambia, cutbacks in health expenditure were harming women farmers who could spend less time farming because of the need to care for sick relatives. Gender-responsive budgeting initiatives, promoted in a number of countries (see e.g. Budlender *et al.*, 2002), might be a useful tool both for gathering information on gender patterns of public services use and for ensuring that social sector spending, especially oriented towards promoting gender equality, is protected. However, data on these issues are still limited.

Box 2

#### What are Structural Adjustment Programmes?

Structural Adjustment Programmes (SAPs) are a set of economic policies that were promoted by the World Bank and the International Monetary Fund (IMF) since the early 1980s as a response to the economic crisis experienced by sub-Saharan Africa during the 1970s. Their aim was to encourage more open and efficient economies and boost economic growth in developing countries. Adopting such policies was often a precondition for countries to obtain loans. SAPs usually included measures such as trade liberalization, deregulation of markets, privatization of public enterprises, a diminished role for the state, reduction of subsidies, and flexibility of the labour market. SAPs became increasingly the subject of criticism because of doubts about their positive impact on the economic growth of developing countries, and concerns about their considerable social costs, including higher unemployment, cuts in welfare spending and greater inequality. In 1999, the World Bank and the IMF introduced the poverty reduction strategies (Poverty Reduction Strategy Papers – PRSPs) as the new framework for concessional lending and debt relief for developing countries.

Source: UNCTAD Secretariat.

## 2.4 Women as tax payers

Women and men pay taxes. However, because of their different economic roles and responsibilities, women and men are likely to be affected differently by tax policies.

A distinction can be made between explicit and implicit biases against women in taxation (Stotsky, 1997; Elson, 2006; UNDP, 2010). Explicit forms of bias include cases in which men and women are subject to different tax rules. An example is the law in Morocco, which grants tax reductions for dependents to men but not to women (Bouazzaoui *et al.*, 2010, as quoted in Hui, 2013: 9). Implicit forms of bias, on the other hand, are the result of social norms and are more difficult to identify; in this case, the different treatment of men and women is not the result of tax law, but rather of how societies are organized. For exam-

ple, in Argentina, Mexico, Morocco, South Africa, and Uganda, tax exemptions and deductions benefit professionals and those in formal employment, who are more likely to be male (Grown and Valodia, 2010).<sup>13</sup>

Another distinction with respect to gender can be made between direct and indirect taxes (see Box 3). In the case of income tax, for example, changes in income tax tend to disproportionately impact men as they usually earn more and own more wealth. The way in which income tax returns are filed is also relevant in assessing the gendered impact of taxation: when the husband's and the wife's income are pooled together for tax purposes, women – who tend to earn less – may decide to drop out of formal employment if the income loss is partially compensated by lower marginal tax rates (Grown and Valodia, 2010; Tax Justice Network, 2011; Hui, 2013).

Box 3

**Direct and indirect taxes**

Taxes can be classified in various ways, according to who pays them, who bears the ultimate burden of them, the extent to which the burden can be shifted, and other criteria. The most common classification is direct and indirect taxes.

Direct taxes are taxes on individuals or companies (income and corporate taxes) based on the tax payer's ability to pay as measured by income or wealth. Individual income taxes are commonly levied on the income of tax payers (be they individuals or households). They are frequently adjusted to take into account the circumstances that can impact the ability to pay, such as family status, number and age of children, etc. Direct taxes are often progressive, meaning that tax rates rise along with income. A direct tax is paid to the government and cannot be shifted to another individual or entity.

Indirect taxes are levied on the production or consumption of goods and services or on transactions, including imports and exports. Examples include sales taxes, value-added taxes (VAT), taxes on legal transactions and customs duties. General sales taxes are applied to most consumer expenditures. The same tax rate can be applied to all taxed items; different items (for example food and medicines) can also be subject to different rates. Some basic goods are sometimes exempted from sales taxes to reduce the tax burden of low-income households. Conversely, excise tax is levied only on particular commodities or services, in particular alcoholic beverages, tobacco, and motor fuel. Indirect taxes are collected by an intermediary (e.g. a merchant) from the person who bears the burden of the tax (e.g. the customer).

Source: Encyclopaedia Britannica [online], Taxation, available at: <http://www.britannica.com/EBchecked/topic/584578/taxation>.

Corporate tax can also have different impacts on men and women (Barnett and Grown, 2004). For example, if there are deductions for small-scale enterprises, women may particularly benefit since they often own and manage such enterprises.

Indirect taxes, such as the VAT, are based on consumption rather than on income. Lower income groups – including women – tend to consume a higher proportion of their income than wealthier groups; therefore, they face a higher tax incidence: in other words, they pay more taxes as a proportion of their income.<sup>14</sup> In addition, as mentioned in Section 2.3 above, men and women are reported to purchase different kinds of items. For example, in the case of India, it is reported that female-headed households concentrate their consumption on items such as food, medicines and clothing, while male-headed households have higher expenditures related to beverages, tobacco, and transportation (Hui, 2013).

Since individual data on taxation are often missing, the most frequent approach to assess the gender implications of changes in both direct and indirect taxation is to differentiate between

the sex of the household's head (see e.g. Grown and Valodia, 2010). This should however only be regarded as a rough approximation as household members might have different earnings that are not captured in this approach.

Policies with an impact on trade are implemented in the context of gendered structures like the ones just described. Given that women in many settings have fewer resources than men, they have greater difficulty in both taking advantage of new opportunities generated by trade and coping with adjustments brought about by trade reforms. The objective of this section was to show that economic policies and related reforms are not gender neutral. Attention needs to be devoted to designing policies and complementary interventions with a view to mitigating any adverse impacts and promoting gender-equitable adjustments. The many channels through which trade and trade-related policies interact with gender will be described in Section 5. Before this, we need to deal in greater detail with the definitions and measurements of "gender (in)equality" (Section 3) on the one hand, and "trade" and "trade policy" (Section 4) on the other hand.

Table 2

Women's economic roles and gender bias	
Women's economic role	Gender bias
<b>Workers and producers</b> <ul style="list-style-type: none"> <li>• Self-employed or wage workers</li> <li>• Contributing family workers</li> <li>• Unpaid (family) workers</li> <li>• Casual<sup>15</sup> (seasonal) workers</li> </ul>	<ul style="list-style-type: none"> <li>• Labour segregation at the industrial, sectoral and occupational level (horizontal segregation)</li> <li>• Vertical segregation</li> <li>• Gender wage gap</li> <li>• Concentration in precarious and low-paid forms of work (part-time and informal jobs)</li> <li>• Fewer skills and lower education</li> <li>• Restricted time availability ("time poverty"): household responsibilities fall disproportionately on women's shoulders</li> <li>• Limited access to and control over income and productive resources (i.e. credit, land and inputs)</li> </ul>
<b>Traders</b> <ul style="list-style-type: none"> <li>• Informal cross-border traders</li> <li>• Street traders and vendors</li> <li>• Owners of micro and small enterprises</li> </ul>	<ul style="list-style-type: none"> <li>• Time constraints to travel long distances to seek better deals</li> <li>• Limited access to and control over different modes of transportation (e.g. bicycles)</li> <li>• Weaker bargaining power</li> <li>• Higher exposure to gender-based violence and harassment</li> <li>• Limited access to capital</li> <li>• Higher health-related risks</li> <li>• Limited access to formal social protection measures</li> <li>• Limited access to business development services that are usually designed without taking into account the needs of women entrepreneurs</li> </ul>
<b>Consumers</b> <ul style="list-style-type: none"> <li>• Purchasers of food and other goods</li> <li>• Users of public services</li> </ul>	<ul style="list-style-type: none"> <li>• Higher exposure to increases in import prices</li> <li>• Higher vulnerability to cuts in public expenditure</li> </ul>
<b>Tax payers</b>	<ul style="list-style-type: none"> <li>• Higher exposure to explicit and implicit forms of bias in taxation</li> <li>• Higher risk of dropping out of work as a result of higher direct taxes</li> <li>• Higher exposure to indirect taxes on consumption</li> </ul>

Source: UNCTAD Secretariat.

### 3 Measures of gender (in)equality

This section provides an overview of the various indicators currently used to measure gender inequality. It focuses only on individual indicators

and does not discuss aggregate indices.<sup>16</sup> This is because composite indices are of limited use for analyses that aim to disentangle multiple distributional effects of trade-induced changes, which is the objective of this teaching material.

Box 4

#### International instruments and goals related to gender equality

Gender refers to the socially constructed differences between women and men. These vary from one society to another, change over time and define who has power and influence over what.

The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) was signed by governments in 1979, entered into force in 1981 and has at present 187 States Parties. CEDAW is the first legally binding instrument that takes a comprehensive approach to prohibiting discrimination against women in all domains and is considered a significant achievement.

The Beijing Declaration and Platform for Action (BDPfA) was signed by 189 governments in 1995. The BDPfA is the first international legal instrument to incorporate a detailed action plan that sets out strategies to ensure equality and full human rights for women in 12 areas of concern: poverty, education and training, health, violence against women, armed conflict, the economy, power and decision-making, institutional mechanisms for the advancement of women, human rights, the media, the environment, and the girl-child.

MDG3 is the Millennium Development Goal that specifically focuses on gender equality and the empowerment of women. The target for Goal 3 is to "eliminate gender disparity in primary and secondary education, preferably by 2005, and at all levels of education no later than 2015". This target is measured as the ratio of girls' to boys' enrolment in primary, secondary and tertiary education. The three other indicators added to MDG3 are: the ratio of literate females to males among 15–25 year olds, the share of women in wage employment in the non-agricultural sector, and the proportion of seats held by women in national parliaments. MDG3 has been subject to some criticism for its narrow (mainly social) interpretation of gender equality and women's empowerment, and for the limited attention paid to the impact of economic factors on women's well-being.

Source: UNCTAD Secretariat.

It is important to clarify here the difference between gender equality and women's empowerment; the two concepts are closely related but quite distinct. Gender equality is about women's status relative to men's status, while empowerment refers to whether women have the ability to exercise control, and have options and choice over practical and strategic decisions. Women can be empowered, for instance, by allowing them to make their own decisions regarding the use of their resources and income (economic empowerment); to access good quality education (social empowerment) and to participate in political life (political empowerment). Women's empowerment is a more controversial concept and more difficult to measure than gender equality because it entails many complex dimensions, such as social norms and institutions, which are highly context-specific.

### 3.1 Three domains of gender equality indicators

The Millennium Project Task Force on Education and Gender Equality has developed a useful operational framework that distinguishes between three domains of gender equality: (a) capabilities, (b) access to resources and opportunities, and (c) security (UN Millennium Project, 2005):

- (a) The **capabilities** domain refers to basic human abilities, such as knowledge and health. These are fundamental to individual well-being and generate the preconditions for engaging in production and economic decision-making. They are usually measured by various education, health and nutrition indicators.
- (b) The **access to resources and opportunities** domain refers to conditions that enable individuals to earn adequate livelihoods for themselves and their families by accessing economic assets and resources and exercising political decision-making. Land, other property and infrastructure are measures of economic assets. Income and employment are commonly used as measures of access to economic resources. Women's share of managerial and leadership positions in cooperatives, businesses and governing bodies can be taken as an indicator of political opportunities.
- (c) The **security** domain refers to vulnerability to violence and conflict. Violence and conflict cause physical and psychological harm and undermine the ability of individuals and communities to fulfil their potential. Security can be measured by indicators such as prevalence of rape, sexual harassment or female trafficking.

Module 3 recalls and draws upon this framework to sketch patterns of gender inequality that may influence a country's export competitiveness.

### 3.2 Relative and absolute measures of gender inequality

Gender inequalities can be measured in relative and absolute terms.

In relative terms, gender inequality can be assessed in different ways, including the following: One approach is to construct a ratio of female to male achievement which can be called the gender parity index (GPI). It is calculated as:

$$GPI_i^t = \frac{F_i^t}{M_i^t} \quad (1)$$

where  $F_i^t$  and  $M_i^t$  are the female and male values of indicator  $i$  at time  $t$ , respectively. The GPI is usually used to measure the relative access of males and females to education; for instance, gender parity indices can be computed for enrolment rates, completion rates, and literacy rates. The GPI of enrolment rates, for example, is calculated by dividing the female enrolment rate by the male enrolment rate for a given level of education. A GPI of 1 indicates parity between the sexes. A GPI that varies between 0 and 1 suggests a disadvantage for females.<sup>17</sup>

A second approach is to calculate the relative gap as the difference between the number of males and females of a given indicator (e.g. literacy rates, employment rates, etc.), which in percentage is given by the formula:<sup>18</sup>

$$Relative\_Gap_i^t = \frac{M_i^t - F_i^t}{M_i^t} * 100 \quad (2)$$

where  $M_i^t$  and  $F_i^t$  are defined as above. The relative gap can also be measured in terms of wages and, in this case, it is usually referred to as the gender wage gap (or gender pay gap). This relative measure of gender inequality has been the subject of numerous studies, especially with regard to the gendered effects of trade. Module 2 will explain the transmission mechanisms from trade to gender and consider the gender wage gap as well. To set the stage for that analysis, see Box 5 for a detailed description of the gender wage gap.

In absolute terms, gender inequality can be calculated as the absolute difference between the number of males and females in a given sphere of their economic and social lives (e.g. school enrolment); this would be computed by subtracting the number of females from the number of males.

Box 5

**The gender wage gap**

The gender wage gap is a relative measure of gender inequality in earnings. It refers to the difference between male and female average wages expressed as a percentage of male average wages. In equation (2) above, the indicator  $i$  therefore stands for average wages. In this sense, the gender wage gap indicates the disadvantage or advantage that females have in terms of males' average earnings. For example, a gender wage gap of 30 per cent indicates that females earn 30 per cent less than men and are thus in a position of disadvantage; a gender wage gap of -10 per cent suggests that females earn 10 per cent more than men and are thus in a position of advantage. This is the total observed gender wage gap, which is commonly referred to in the literature as the "raw gender wage gap".

However, to gain a full understanding of what the gender wage gap is and how to measure it, further explanations are necessary. Researchers and analysts use and measure the gender wage gap in different ways according to the purpose of their study and data availability. This explanation attempts to provide the reader with some clarifications by following two steps.

The first step is to identify the composition of the gender wage gap or the kind of wage measure one wants to use. Usually, if data are available, the best measure to use would be hourly wages. Because women work fewer hours than men, using monthly or weekly wages could bias (and inflate) the gender wage gap. Using hourly wages not only makes more sense statistically because we are correcting the gender wage gap for hours worked, but can also reveal the real improvements made by women in the labour market.

The second step is to decompose the raw gender wage gap into an explained and unexplained (or residual) component. The former refers to that portion of the gender wage gap that can be explained by factors influencing workers' wages other than hours worked; they include human capital variables, such as education, experience, occupation and union status. The latter indicates the portion of the gender wage gap that remains unexplained after this exercise and that is attributed to gender discrimination or labour market variables that are difficult to account for. For instance, labour market segregation plays a big role in the gender wage gap. In a study on Madagascar (Nicita, 2006), for example, it was found that the textile industry hired equally qualified men and women when it expanded and became internationally competitive. However, while men got high-skilled and better paid positions, women were concentrated in the lowest nodes of the textile production. As a consequence, the gender wage gap increased. Different statistical techniques have been developed to decompose the gender wage gap into its explained and unexplained portion (see e.g. Juhn and Murphy, 1989, or the Blinder-Oaxaca decomposition of 1973).

Source: UNCTAD Secretariat.

Female to male ratios, referred to in the first approach, appear to be the most commonly used measure of gender disparities. It is important, however, to be aware of the drawbacks of such indicators. A problem with ratios is that there may be some cases where a ratio of one, indicating gender parity, is misleading. For example, Klasen (2004) noted that a ratio of one for infant mortality rates would actually be an example of gender bias favouring males rather than equality of survival since it is well known that females enjoy a biological survival advantage over males in infancy. An even more serious limitation is that ratios say nothing about the context in which the change happens and the direction of its individual components. For an accurate interpretation of changes in ratios, information on the data used to construct the different measures must be available. Taking as an example the ratio of female-to-male wages, increases in female-to-male ratios do not necessarily derive from an increase in female wages but can for instance result from either a fall in male

wages, with female wages remaining constant, or a decline in both female and male wages, with male wages declining faster. Without additional information, the researcher would be able to say nothing on whether improvements in the ratio reflect increases in women's wages (desirable) or decreases in men's wages (undesirable). Therefore, a correct interpretation of ratios requires trend analysis of the underlying indicators.

As opposed to relative measures, absolute measures use a fixed threshold against which outcomes are measured. For example, maternal mortality is measured against the benchmark of maximum achievement, in other words, the country with the lowest mortality rate.

### 3.3 Availability and quality of sex-disaggregated data

The best sources of sex-disaggregated data are household surveys and labour force surveys.

While the former provide extensive information on the living conditions of the household, as well as data on age, marital status, family role, education, employment status, earnings and expenditure for each member of the household, the latter concentrate on labour market statistics (which can also be collected by household surveys), such as wages, hours worked and individuals' union membership. Household and labour force surveys are usually designed and implemented by national statistical offices although there are some surveys sponsored by international organizations (such as the Living Standard Measurement Survey – LSMS – by the World Bank). Listing all the available sources of sex-disaggregated data is not the purpose of this module but we would like to reassure the reader about the question of the patchiness of data raised in Section 2. Despite the paucity of data and lack of standardization across countries that may restrict the capacity to develop appropriate gender indicators for use in gender-aware research and policy, developing countries are strengthening their capacity to develop valid sources of gender-disaggregated statistics. Hopefully, in a few years, improved data, both in terms of quantity and quality, will become available in each domain of gender inequality. As of now, the problem of data availabil-

ity is more acute in some domains than in others (and in some developing regions more than others). The capability domain contains the largest number of comparable cross-country indicators. Very few reliable indicators are however available for the security domain, and data gaps are also prevalent in the domain of economic opportunities. For example, the recent report on progress in statistics of the *World's Women* (UNDESA, 2010) shows that most countries of sub-Saharan Africa and South Asia are missing data on the share of women in non-agricultural wage employment, and even fewer have information on women's relative earnings.

In addition, a frequent problem with many low-income countries' statistics, especially on employment, is that they lack the level of sectoral disaggregation (in agriculture, as well as manufacturing) that is commonly used in trade classifications. This undermines the capacity to carry out comprehensive gender impact assessments of trade liberalization, for example. More general limitations of current household and labour force surveys have to do with the irregularity with which they report details on qualitative aspects of work, such as workplace conditions, benefits, hours of work and earnings.

## Box 6

**The category of female-headed households**

Sex-disaggregated data are often collected on the basis of the distinction between female-headed and male-headed households. Frequently, such data are the only sources available for conducting a gender-sensitive analysis; however, some caution should be used when utilizing them.

Female-headed households may include different situations: one-person households, households where the only adult is a woman, or households where there are two adults – a man and a woman – and the woman is considered the household head. Moreover, women can be household heads on a regular or temporary basis if the male partner is only temporarily absent.

Traditionally, the household head is considered to be the person who is economically responsible for the household and has authority over it. However, this concept loses its relevance in circumstances where both spouses/partners provide economic support to the household and both have responsibilities and authority within the household. The assumption that the male adult in the household is by default the head of the household is misleading and may distort the facts, although such an assumption has been largely used in gender analyses.

Using different criteria to identify the head of the household has an impact on how different kinds of households are associated with different poverty rates. For example, data from Panama, based on the 1997 LSMS, distinguished between three different kinds of female-headed households, namely: (a) households where women reported to be the head of the household; (b) households where women were defined as “potential” household heads since no adult males were present; and (c) households where a woman was providing more than half of the total household labour hours worked. According to the analysis, the overlap between the three categories of households was low and the corresponding poverty rates were different: 29 per cent for the self-declared female-headed households; 23 per cent for the “potential” female-headed households; and 21 per cent for the households mainly relying on a woman's work.

Source: UNDESA (2010).

### 3.4 Gender indicators for employment, income and assets

The remainder of this section discusses strengths and weaknesses of a few selected variables in the domain of economic opportunities, which are the most commonly used indicators in studies of the relationship between gender and trade. Other indicators of well-being, such as educational attainment or health status, are also relevant to our understanding of the interactions between gender differences and trade changes, however. The reader is encouraged to consult sources such as Buvinic *et al.* (2008) for an extensive list and a comprehensive discussion of all the indicators that have been used by the United Nations and other specialized agencies for monitoring gender equality on a global basis. The UN has also compiled a “minimum set” of 52 gender indicators in different areas, including economic structure and health, and created a directory of UN Resources on Gender and Women’s Issues that interested readers can explore.<sup>19</sup>

A number of indicators can be used to capture gender inequality in the domain of economic opportunities (see Table 3 for a summary of these indicators). For paid employment, such indicators include labour force participation, the female share of paid non-agricultural employment and unemployment. For unpaid work, indicators include the female and male shares of non-market time devoted to care. Indicators that capture conditions of and returns from work are female and male shares of vulnerable employment, occupational segregation, and female to male earnings. Other indicators of access to resources may consist of, among others, women’s ownership and control over productive assets, such as land or housing. Some of these indicators are examined in detail below.

(a) The **labour force participation rate** is one of the most widely used indicators of gender inequality in paid work. The rate measures the number of persons in the workforce as a percentage of the population in working age, and is usually disaggregated by sex and age. Both those who are employed and those who are unemployed but looking for jobs are included. Typically, “working-age persons” are defined as people between the ages of 15 and 64. This measure however says nothing about the quality of work and gives no indication as to whether women are entering the paid labour market out of choice or need. Higher female participation in the paid labour force can reflect women’s free choice to take up new opportunities but can also represent “distress sale” of labour by women who are pushed to take up jobs because of the falling earnings of

other household members. Another potential drawback relates to the fact that labour force participation data may undercount workers who only work for a few hours or in their homes. Females are more frequently found in these types of employment than males.

- (b) The **female share of paid non-agricultural employment** is calculated as the number of women in paid non-agricultural employment divided by the total number of persons in paid employment in the non-agricultural sector, and is used for monitoring progress on the achievement of MDG3. One problem is that, in many countries, especially in South Asia and sub-Saharan Africa, non-agricultural wage employment represents only a small portion of total employment. Moreover, this measure does not capture the quality of work. For example, it does not reveal the different types of non-agricultural wage employment, some of which (e.g. domestic services) can be worse than agricultural work in terms of earnings or social protection. If the increase in female non-agricultural employment is driven by an increase of the share of women in low productivity and precarious types of jobs, this should evidently not be interpreted as emancipatory for women.
- (c) **Unpaid work** is classified by the 1993 UN System of National Accounts (SNA) into three categories: (a) housework, childcare and other family-related services not recognized by SNA as economic activity; (b) subsistence and non-market activities, such as agricultural production for household consumption and imputed rent of own-occupied dwellings; and (c) household enterprises producing for the market for which more than one household member provides unpaid labour. An indicator for gender gaps in unpaid work could be the ratio of female hours per week spent on unpaid work to male hours per week spent on unpaid work. A ratio greater than one would mean that women do more such work than men. As already mentioned in this section, time use data, which are essential for the construction of an indicator of gender gaps in unpaid work, are being collected in a growing number of developing countries. However, these data are unfortunately not regularly available and are rarely updated periodically.
- (d) **Unemployment rates**<sup>20</sup> disaggregated by sex are important indicators of labour market performance in industrial countries, but are much less useful in low-income economies where the majority of the population is in-

volved either in informal work or self-employment. Unemployment has different meanings in countries that have unemployment insurance, as compared to those that do not. In the latter, most people cannot afford to be unemployed. This is the case for the majority of countries in the less developed regions where visible unemployment may be low but is often disguised as underemployment. In addition, discouraged workers may no longer seek work and are therefore excluded from the count of unemployment. Both underemployment and discouraged worker effects are likely to have distinct gender patterns across countries, and even within countries.

- (e) **Occupational segregation** (i.e. the separation of women and men into different occupations) can reflect different opportunities available to female and male workers and can be useful to capture the rigidity of occupational hierarchies and “job ladders” for women. Occupational segregation is usually measured by the index of dissimilarity (*ID*). This index can vary from 0 (no segregation, implying an equal percentage of women in each occupation) to 1 (maximum segregation, implying that all female workers are in occupations where there is no male worker) and is measured as the sum of the ab-

solute difference in women’s and men’s distribution over occupations. It is calculated as:

$$ID = \frac{1}{2} \sum \left| \frac{M_i}{M} - \frac{F_i}{F} \right| \quad (3)$$

where  $M_i$  is the number of males in the occupation  $i$ ,  $M$  is the number of males in the workforce,  $F_i$  is the number of females in the occupation  $i$ , and  $F$  is the number of females in the workforce. The index score can be interpreted as the percentage of workers that would have to change jobs to obtain equal distribution of employment. The index of dissimilarity does not measure discrimination itself, but rather the tendency of labour markets to be segmented along gender lines. Another drawback related to data availability is that occupational segregation may not cover informal employment.

A good source of data for occupational segregation is the ILO SEGREGAT dataset which contains employment statistics for detailed occupations by sex (see Box 7). Although employment information is provided for more than 80 developed and developing countries, data are not always comparable across countries and points in time because of differences in data sources, data coverage and national classifications used across countries.

Box 7

**ILO SEGREGAT dataset**

The ILO SEGREGAT dataset contains disaggregated employment information by sex at the three-digit occupational level. Statistics are provided in different occupational classifications depending on how data are collected by the country; however, for most countries, employment information is available at the ISCO-88 three-digit occupational level.<sup>21</sup> Employment is defined by the total number of people employed and in search of employment (depending on the source of information at the country level) in a specific occupation.

Source: UNCTAD Secretariat.

- (f) **Earnings** are a key factor affecting inequality in economic opportunities. The gender wage gap falls in this category and, as mentioned above, reflects inequalities that almost invariably affect women. In particular, women’s earnings tend to be lower than men’s because of occupational segregation in lower-paid positions or direct earnings discrimination. Yet, the wage gap may also reflect individual choices: women are often prepared to accept lower pay as a result of lower aspirations with regard to earnings. A major drawback of the gender wage gap is that earnings data disaggregated by sex are not provided by many countries. When they exist, they are mostly available only for non-agricultural work and often only for the formal manufacturing sector. Accurate information on remuneration from informal employment, for instance, is rarely available.

Comparability of wage data across countries is further affected by the inclusion or exclusion of overtime pay, bonuses, payments in kind and other allowances, as well as the unit of time used. Earnings are mostly reported as average earnings per month, which further complicates comparison between male and female wages when data on hours of work are not available, since women tend to work different hours than men. Limited data on gender-disaggregated wages is a serious problem that undermines the analysis of trends over time and across countries.

- (g) **Distribution of assets.** In agricultural societies, access to assets, such as land and credit, may be more salient as an indicator of gender equality than wages and employment (as noted by Agarwal, 2003). Yet sex-disaggregated data on

the distribution of land and housing ownership or on credit access are even more patchy than data on wages. In Africa and Asia, most of the information on the distribution of land ownership by gender comes from scattered household surveys. Some of the LSMS managed by the World Bank include questions on individual ownership of land, but the frequency is low. Even when legal data on women's access to land, house titles or credit are available, this is not sufficient to gauge whether they

have control over such resources in practice, due to social pressures and conventions. Efforts are currently under way to support the revision of the definition of agricultural holder in agricultural censuses so as to allow for the collection of data that reflect the possibility of multiple ownership of land and multiple decision-making in rural households (FAO, 2010). This is a promising step, but, for the moment, assessments of gender equality in agriculture-based economies remain challenging.

Table 3

Summary of gender indicators for employment, income and assets					
Indicator	Category	Domain	Description	Strengths	Weaknesses
<b>Labour force participation rate (LFPR)</b>	Paid employment	Access to resources and (economic) opportunities	$LFPR_i^t = \frac{EMP_i^t + U_i^t}{POP_i^t} * 100$ <p><math>EMP_i^t</math> = number of employed of gender <math>i</math> at time <math>t</math>  <math>U_i^t</math> = number of unemployed but seeking employment of gender <math>i</math> at time <math>t</math>  <math>POP_i^t</math> = population in working age of gender <math>i</math> at time <math>t</math></p>	<ul style="list-style-type: none"> <li>• Most widely used indicator of gender inequality in paid work</li> <li>• Data availability</li> </ul>	<ul style="list-style-type: none"> <li>• No information on quality of work</li> <li>• Does not account for workers who work only for a few hours or household workers</li> </ul>
<b>Female share of paid non-agricultural employment (FPNAE)</b>	Paid employment	Access to resources and (economic) opportunities	$FPNAE^t = \frac{FNAE^t}{NAEMP^t} * 100$ <p><math>FNAE^t</math> = number of female in paid non-agricultural employment at time <math>t</math>  <math>NAEMP^t</math> = total number of female in paid non-agricultural employment at time <math>t</math></p>	<ul style="list-style-type: none"> <li>• Monitors progress on MDG3</li> </ul>	<ul style="list-style-type: none"> <li>• Does not capture quality of work</li> <li>• In developing countries, paid non-agricultural work only represents a small fraction of employment</li> </ul>
<b>Domestic work ratio (DWR)</b>	Unpaid employment	Access to resources and (economic) opportunities	$DWR^t = \frac{DF^t}{DM^t}$ <p><math>DF^t</math> = female hours per week spent on housework at time <math>t</math>  <math>DM^t</math> = male hours per week spent on housework at time <math>t</math></p>	<ul style="list-style-type: none"> <li>• Accounts for the part of domestic work that falls disproportionately on women's shoulders</li> </ul>	<ul style="list-style-type: none"> <li>• Time use surveys not readily available and rarely updated</li> </ul>
<b>Unemployment rates (UR)</b>	Paid and unpaid employment	Access to resources and (economic) opportunities	$UR_i^t = \frac{U_i^t}{EMP_i^t + U_i^t}$ <p><math>U_i^t</math> and <math>EMP_i^t</math> as above</p>	<ul style="list-style-type: none"> <li>• Important indicator of employment and unemployment, especially in developed countries</li> </ul>	<ul style="list-style-type: none"> <li>• Does not account for self-employed, underemployed or those employed in the informal sector</li> </ul>
<b>Index of dissimilarity (ID)</b>	Occupational segregation	Access to resources and (economic) opportunities	$ID = \frac{1}{2} \sum \left  \frac{M_i}{M} - \frac{F_i}{F} \right $ <p><math>M_i</math> = proportion of males in occupation <math>i</math>  <math>F_i</math> = proportion of females in occupation <math>i</math>  <math>M</math> = number of males in the workforce  <math>F</math> = number of females in the workforce</p>	<ul style="list-style-type: none"> <li>• Measures the distribution of occupations across genders</li> </ul>	<ul style="list-style-type: none"> <li>• It is not an exact measure of discrimination</li> <li>• Data availability</li> <li>• Does not take into account informal employment</li> </ul>
<b>Gender wage gap (GWG)</b>	Earnings	Access to resources and (economic) opportunities	$GWG = \frac{W_m^t - W_f^t}{W_m^t} * 100$ <p><math>W_m^t</math> = males' (hourly) wages at time <math>t</math>  <math>W_f^t</math> = females' (hourly) wages at time <math>t</math></p>	<ul style="list-style-type: none"> <li>• Conveys the extent of gender-based discrimination in wages when human capital variables are accurately controlled for</li> </ul>	<ul style="list-style-type: none"> <li>• Data availability</li> <li>• May not capture gender inequality in agriculture-based economies</li> </ul>
<b>Distribution of assets</b>	Access to resources	Access to resources and (economic) opportunities		<ul style="list-style-type: none"> <li>• More accurate measure of gender inequality for agricultural economies</li> </ul>	<ul style="list-style-type: none"> <li>• Data availability</li> </ul>

## 4 Trade: Definition and measurement

In the previous section, we have seen that gender (in)equalities can be defined and measured in various ways. This section analyses the concept of “trade”; its aim is to clarify what we identify as trade and how it can be measured. Indeed, just when looking at the literature on trade and gender, there are many different interpretations of trade depending on the purpose of the study, and the use of one measure or another may sometimes lead to very different conclusions. It is thus important to be clear about which measure of trade is being used and to be aware that the validity of the statements depends on the choice of the indicator. In the remainder of this teaching material, we will also use “trade” to refer to different phenomena. But before explaining what we mean by trade, it is useful first to make some paramount distinctions and disentangle the different levels of analysis involved.

### 4.1 Some preliminary distinctions

At the outset, it is important to distinguish between “trade” and “trade policy”. “Trade” refers to the international flow of goods and services, or the exchange of goods and services across international borders. “Trade policy” refers to laws, regulations and requirements affecting trade. Both concepts deserve closer scrutiny.

#### 4.1.1 Trade

When assessing the relationship between trade and gender, two structural aspects of trade are frequently considered, separately or together: the degree of trade openness of an economy, and patterns of structural transformation in the composition of trade.

##### (a) Trade openness

The first issue – trade openness, or more precisely, “trade openness in practice” – indicates a country’s degree of integration into the world economy. In other words, trade openness gauges the importance of international transactions relative to domestic activities and is usually measured by actual trade volumes in a specified period of time. Specific indicators include either exports or imports, or both.<sup>22</sup> These can be recorded either in absolute terms or as a share of a country’s gross domestic product (GDP).

Trade openness “in practice” shall be kept distinct from a different though related notion of “openness in policy” (see Table 4). The latter is concerned with the existence and extent of measures designed to restrict or enhance trade (McCulloch *et al.*, 2001), an issue discussed below under “trade policy”. Some of the most commonly used indicators include simple or trade-weighted average tariff levels, collected tariffs, the effective rate of protection, non-tariff barriers (NTBs) and various composite indices. Openness in practice is not necessarily linked to trade openness in policy as it may also be the result of non-policy factors such as the size of the country, natural resource endowments and other determinants of comparative advantage<sup>23</sup> (McCulloch, 2001). This is why it is important to recognize the difference between the two measures. Governments may not be able to determine or control openness in practice. Higher or lower exports and imports are not necessarily the result of policies. Geography, size and income are important determinants of a country’s external sector as well. For example, trade generally accounts for a much larger share of GDP in small countries than in large countries. Countries that are open in practice may not be open in policy and vice versa. In addition, trade policy may not translate into the desired trade outcomes for various reasons. These include limited physical infrastructure (such as ports and roads), weak productive capacity and lack of resources and measures to stimulate their development, distorted markets, restricted access to information and productive resources. Most of these impediments affect vulnerable women in particular. We will further discuss this point in the next modules, especially in Module 3. Obstacles can also exist at the international level (and be beyond the control of a country’s government), such as when market access is restricted by trading partners, volatility in world prices of a country’s main export is high, or competition from other countries increases.

An ideal measure of a country’s openness would be an index that includes all measures that distort international trade. Researchers have tried to construct various indices of trade restrictiveness (Leamer, 1988; Sachs and Warner, 1995; Kee *et al.*, 2006, etc.) and rank countries according to them, but the emerging consensus is that these indices have important shortcomings.

Table 4

Measures of trade openness	
Openness in practice	
Measure	Definition
Volume of exports and/or imports	Volume (in quantity or value terms) of exports and/or imports in a specific point in time, usually a year.
Total trade	Sum of exports and imports in a specific point in time.
Trade share	Ratio between exports (and imports) and the country's GDP in national currency: $Trade = \frac{Exp (+Imp)}{GDP}$ Sometimes imports are not included, depending on the purpose of the analysis.
Adjusted trade shares	Ratio between exports and imports and the country's GDP in purchasing power parity (PPP). This measure is useful for correcting for the different prices of tradables and non-tradables in countries at different stages of development.
Growth rate of exports/imports, total trade/trade share	Change from one point in time to the next (usually a year) of the respective indicator.
Openness in policy	
Measure	Definition
Tariff averages (simple or trade-weighted)	Simple average tariffs are calculated by adding up all the tariffs and dividing by the number of import categories. The simple average tends to overstate protection; the weighted average – calculated by weighing each tariff by the value of imports in the respective category – is therefore used to overcome this problem. This may however lead to the opposite problem, that of understating protection, since, for instance, prohibitively high tariffs would be underrepresented.
Effective rate of protection	By taking into account the effects of tariffs on inputs to production as well as on the output, the effective rate of protection estimates how a country's tariff structure protects the value added of industries at different stages of production. The idea is that the effective protection of a good is equal to the sum of protection applied to its components.
Collected tariff ratios	Collected tariffs, defined as the ratio of actually collected custom duties to import values, are one of the most direct indicators of trade restrictions. Pritchett and Sethi (1994) documented the wide divergence between collected rates and official tariff rates and argued that to use collected rates as “effective” tariffs might be more appropriate. The relevance of this indicator is likely to depend on the factors that cause the divergence between the two rates.
Coverage of quantitative restrictions or other non-tariff measures	Another measure is the percentage of goods covered by quantitative restrictions (quotas) or other NTBs, such as export subsidies or import incentives.

Source: Based on definitions in Edwards (1993) and McCulloch *et al.* (2001).

**(b) Structural composition of trade**

When assessing a country's trade stance, it is important to move beyond an assessment of trade openness, and explore some structural or qualitative aspects of a country's foreign trade. Two important aspects in this respect are the degree of export diversification/concentration and the technological intensity of a country's foreign trade. Both of them may have important gender ramifications. For example, an increase in labour-intensive exports with low technology intensity, such as clothing or light assembly manufacturing, is often accompanied by an increase in female wage employment in the formal sector. A number of country case studies by UNCTAD (e.g. on Lesotho and Angola) assess the gender ramifications of structural changes in output and trade.

The degree of concentration/diversification of a country's foreign trade is captured through different measures, including: the number of products traded internationally by a country (a very simple measure of diversification); concentration indices, which show how exports and imports of individual countries or a group of countries are concentrated on a limited number of products or otherwise distributed in a more scattered manner among a series of products; and the diversification index, which reveals the extent of the differences between the structure of trade of the country or country group and the world average.<sup>24</sup> Measures of technology intensity aggregate and classify goods by technology content.<sup>25</sup>

Before moving on to consider the second term – trade policy – it is important to recall that there are static and dynamic measures of trade. The for-

mer indicate the state of trade at a specific point in time, such as the amount of export volumes of a country in a given year, and convey the level of integration of a country. Dynamic measures of trade identify changes in trade over time such as the growth rate of exports. Changes in trade may be the result of trade reforms but can also reflect changes in prices when trade flows (i.e. exports and imports) are measured in values, or changes in the industrial policy of the country. Changes in trade may also be the result of demographical changes (i.e. a growing population has bigger consumption needs) or switches in consumption patterns (e.g. the introduction of more meat in the diet, partially replacing cereals).

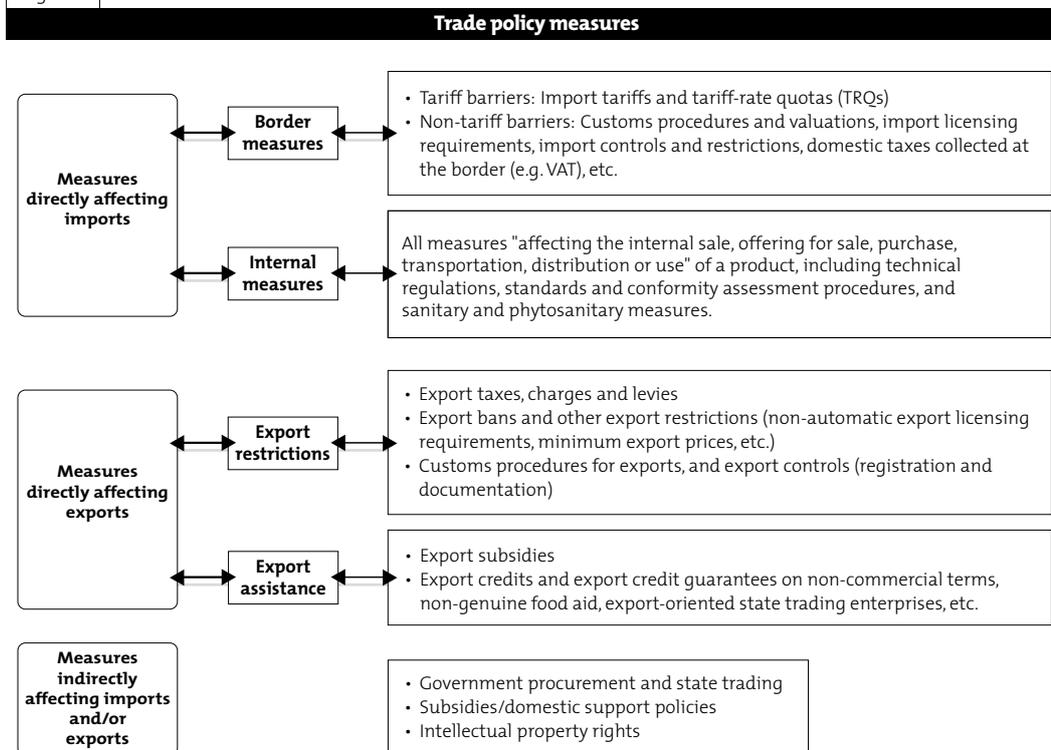
### 4.1.2 Trade policy

The term “trade policy”, as mentioned above, covers laws, regulations and requirements affecting trade. We often talk of “trade policy in practice”. Indeed, what matters is not only the rule as such, but the way the rule is applied in practice.

To substantiate the notion, it is important to distinguish between the two sides of the trade policy equation: policy measures affecting imports,

on the one hand, and policy measures impacting exports on the other (see Figure 3). The first type of measures relates to the degree of a country’s import trade openness, or in other words the degree of market access it grants. The second type of measures shapes a country’s export competitiveness (e.g. export subsidies), among other things, but it may also serve domestic policy purposes, such as food security (e.g. export restrictions on domestically consumed staples). For trade policy purposes, it is also important to distinguish between border and internal measures (as a matter of fact, a rather intractable distinction – internal measures are often enforced at the border); and between tariffs and non-tariff barriers. We shall also consider a wide spectrum of trade policies and instruments that affect domestic production and trade (from domestic support to state trading) although they are not specifically focused on the regulation of trade flows. Trade policy covers all these aspects, which are in practice complexly intertwined. It is also important to stress that the term “trade policy” is neutral in terms of policy direction: it covers both trade liberalization measures – aimed at the removal or reduction of tariff and non-tariff barriers on the free exchange of goods and services – and protectionist measures.

Figure 3



Source: UNCTAD Secretariat.

Trade measures, and particularly tariffs, can be analysed at various levels of aggregation. On the one hand, aggregate measures provide general information on a country's trade openness, including its trade partners, and can be useful at an initial stage of a trade-related analysis. On the other hand, disaggregated measures focus on a country's trade openness at the sectoral, product or firm level and this micro-level information becomes more useful for a detailed trade-related analysis, such as when investigating the

gendered distributional impacts of trade. As a general rule, in reviewing a country's trade policy, it should be borne in mind that "the devil is in the detail": meaning that to yield meaningful insights, the analysis of import and export-related measures should be conducted at a disaggregated level (ideally by product, at the HS 6-digit level), taking into due account a country's bilateral trade flows (major exports and imports by destination and source country). Box 8 provides a description of the classification of traded goods.

Box 8

#### International systems of classification of traded goods

The Harmonized Commodity Description and Coding System (HS) is an international nomenclature for the classification of products developed by the World Customs Organization (WCO) in 1988. It has been adopted by most countries worldwide and is currently used to classify over 98 per cent of world merchandise trade. The classification has undergone several updates since its inception to reflect developments in technology, changes in trade patterns and the needs of users. The HS comprises about 5,300 product descriptions that appear as headings and subheadings, arranged in 99 chapters, grouped in 21 sections. At the international level the HS is a 6-digit code system. Additional digits may be added at the country level.

The Standard International Trade Classification (SITC) was developed by the United Nations, with the intention of classifying traded products not only on the basis of their physical properties, but also according to the stage of processing, their economic use and their technological properties. The overall aim of the SITC is to facilitate economic analysis. The SITC maintains a correspondence with the HS and this is why it has undergone four revisions (revision 4 was adopted in 2006) to maintain consistency with the development of the HS. SITC classifies merchandise in approximately 3,000 commodity groups and is less detailed than the HS.

Source: UN Statistics Division.

With the progressive removal of formal trade barriers, other issues have gained importance. These include trade facilitation as well as tackling non-official market entry restrictions.

Narrowly intended, trade facilitation refers to the simplification of trade procedures (e.g. procedures for customs clearance). More broadly intended, trade facilitation is concerned with: the establishment of trade-related infrastructure (e.g. transport and storage); the delivery of supply-side services to enhance productive capacity (e.g. market information services or agronomic extension services); and the delivery of aid for the implementation of trade policy reforms. Trade facilitation is currently part of trade policy. To some extent, there has been a shift in emphasis in trade policy from "trade liberalization" to "trade facilitation". For instance, the gains that the African, Caribbean and Pacific (ACP) countries could obtain from signing the European Partnership Agreements (EPAs) with the EU are more linked to trade facilitation than market access.<sup>26</sup> At the Bali World Trade Organization (WTO) Ministerial Conference in December 2013, WTO members reached a consensus on a Trade Facilitation Agreement as part of a wider "Bali Package". The agreement contains provisions

focused on measures and policies aimed at simplification, harmonization and standardization of border procedures, along with provisions for technical assistance and capacity building in this area.

Market entry barriers are barriers to trade that arise from the structural characteristics of supply chains and markets. Indeed, the actual ability to enter an export market is not only affected by government regulations that determine market access conditions. Important trade barriers arise from entry conditions posed by private actors, e.g. private standards set by large distribution networks (UNCTAD, 2003). These issues, which fall beyond the remit of the WTO, may possibly be tackled within the framework of trade facilitation initiatives.

#### 4.2 The use of the concept of trade

We will now discuss the particular concept of trade used in this teaching material.<sup>27</sup>

In Module 2, where we will describe the transmission mechanisms from trade to gender, you will notice that the most frequently used trade-related terms are:

- **Trade policy**, which refers to a set of policy measures affecting international trade, including changes in tariffs and non-tariff measures. As discussed, trade policy can either indicate a fall or an increase in trade barriers; the decision of a country on which kind of trade policy to implement depends on both domestic (e.g. industrial policy) and external factors (e.g. pressure from the international community, surge of exports).
- **Trade liberalization**, which indicates the reduction or removal of trade barriers in the form of tariffs and non-tariff measures, including quantitative restrictions. Trade liberalization is one of the options available for trade policy formulation (as opposed to trade protectionism). It may be the result of bilateral, regional or multilateral commitments taken by a country, or may be pursued unilaterally. Following our classification above, trade liberalization falls in the category of “trade openness in policy”. However, trade liberalization is often confused with “openness in practice” because of the causality effect linking the two concepts. A reduction in trade barriers encourages and often leads to an increase in trade flows but, as we have seen above, this is not always the case.
- **Trade protectionism**, which refers to restrictions on imports by means of tariffs and non-tariff measures meant to protect domestic producers from competition with imported goods.
- **Trade integration**, which refers to the process of increasing a country’s participation in the world market through trade, accomplished by trade liberalization.
- **Trade flow**, which indicates the quantity or value of a country’s trade with another country within a certain period of time.
- **Trade share**, which refers to either imports or exports (or their sum) as a percentage of GDP.
- **Trade regime**, which refers to the laws and practices that govern a country’s international trade.
- **Free trade**, which refers to a situation where there are no barriers to trade.
- **Trade performance**, which is quantified in terms of export flows. We say that a country has improved its trade performance when it has experienced an increase in the quantity

of exports. This may be the result of a reduction in trade barriers by a trading partner or of an export-led growth strategy promoted by the country itself. Identifying an increase in the value of exports as an improvement in trade performance may however be incorrect, depending on whether it is the prices or the quantity of exports that have increased.

In Module 3, where we will analyse the effect of gender on trade, we will refer to trade in terms of trade (ToT) performance and/or export competitiveness. In the latter case, a country’s export competitiveness is measured in terms of lower prices of its exports compared to the prices of its international competitors. Improved export competitiveness may translate into increased trade performance and create positive spillover effects on a country’s economy as a whole. We will further elaborate on this point in Module 3 and explain the historical role of gender inequality in increasing export competitiveness in some South-East Asian countries.

## 5 The trade-gender relationship

### 5.1 A two-way relationship

Changes in a country’s trade patterns and volume (whether resulting from domestic trade policies or from trends at the international level, such as instability in world prices of exports and imports) take place in the context of economic structures and institutions that tend to be shaped by gender bias. This has two implications.

The first implication is that the distributional outcomes of trade vary by gender: within a country, men and women tend to be affected by changes in trade patterns and volumes differently, as discussed in detail in Module 2. Furthermore, the effects of trade are likely to vary among women themselves, depending on their ethnicity, age, income, educational level, migration status, as well as the social obligations prevailing in their households and communities. Module 2 elaborates on the discrete impact of trade and trade policy on women and men (the first side of the equation of the trade-gender relationship).

The second implication is that gender inequalities tend to affect trade strategies for competitiveness and the extent to which a particular set of trade measures will translate into the desired economic performance. Possible reasons for bottlenecks between trade policy and trade performance include inadequate productive capacity, restricted access to information and markets, limited availability

of productive resources, such as skills or credit, as well as weak infrastructure. All these factors can be said to be “gender intensified” in the sense that they reflect asymmetric distributions which can in principle limit men’s opportunities as well as women’s, but which usually bear down more heavily on women. Module 3 discusses the impact of gender bias on a country’s competitiveness and export performance (the second side of the equation of the trade-gender relationship).

### 5.2 Gender-sensitive frameworks for the analysis of the trade-gender relationship

A number of analytical frameworks exist that could help in organizing our thoughts about the interaction of trade with gender inequalities. An approach frequently used in gender analysis, but which can also be applied to the links between trade and gender, is to distinguish between the “macro”, “meso” and “micro” levels (Elson *et al.*, 1997). Macro-level analysis examines the gender division of the labour force between the productive market sectors and reproductive sectors. Meso-level analysis looks at the institutions and frameworks responsible for the distribution of resources, the provision of public services and the functioning of labour, commodity and other markets. Micro-level analysis provides an in-depth analysis of the gender division of labour, resources and decision-making, particularly within the household (UNICEF, 2011).

Our analysis of the channels of interaction between trade and gender suggests that trade can affect gender inequalities at all these three levels. For example, gender gaps in market participation may narrow if the expanding sectors are more female-intensive than the contracting sectors (macro); public provision of social services that favour women (such as health and education) may be undermined if the loss of government revenue from reduced tariffs leads to cuts in such services (meso); female control over household spending may be reduced or extended, depending on whether trade liberalization destroys or creates sources of independent income for women (micro). Employment, public provision and consumption effects may in turn have consequences for the level and gender distribution of unpaid work at both the micro level (among household members) and macro level (between households and public institutions).

Another useful distinction when analysing the gender impact of trade is the difference between practical and strategic gender needs (Moser, 1989). Moser argues that it is important not only to assess the impact on women’s current mate-

rial status, given their tasks and responsibilities under the established gender division of labour (practical needs), but also to examine whether outcomes contribute to more egalitarian gender relations in the long term, by reducing the basis of women’s economic disadvantage and widening women’s options (strategic needs). An assessment of trade interventions through the practical versus strategic needs lens would lead, for example, to prioritizing interventions that enhance the economic participation of vulnerable women in new sectors (for instance, by promoting training that boosts their upward mobility in technical jobs) over measures that are confined to supporting a few traditionally “female” industries, such as textiles.

Another important contribution to conceptual frameworks for the analysis of trade and gender is provided by Elson *et al.* (2007) who draw on heterodox trade theories to develop a critique of the concept of comparative advantage and highlight that the acquisition of competitive advantage is a gendered process. They refer to post-Keynesian and Marxist theories that maintain that trade is based on absolute advantage rather than comparative advantage and that competition should be understood in terms of a proactive search for competitive advantage where each actor (e.g. firms) uses strategies to dominate other actors. We will see in the following section how this theoretical framework can be used to analyse the channels of interaction from gender to trade.

### 5.3 Channels of interaction between trade and gender

We start by describing how trade affects women’s economic empowerment and well-being. Trade alters the distribution of income and resources between different groups of women and men through different channels, and affects them in their multiple roles as workers and producers, consumers, and tax payers entitled to public services.

First of all, trade may lead to changes in the structure of production, with sectors producing for export expected to expand and other sectors sensitive to import competition expected to contract. This, in turn, causes changes in the level and distribution of employment of different categories of workers (employed in different sectors with different intensities), as well as in their remuneration. The economic volatility often associated with production for world markets is also likely to affect the quality and security of employment for various groups of workers and producers differently, with small-scale producers and low-skill workers more often bearing the brunt.

Second, trade-induced changes in the relative prices of goods and services bring about changes in real incomes that affect groups differently, depending on their consumption patterns and livelihood strategies. This will have implications for both resource and time allocations within different types of households.

Third, trade openness is also likely to reduce tariff revenues, and this, in turn, may have gender-specific effects on the size and composition of government expenditure (for example, via the availability of government resources for social programmes and infrastructure). Even if the government manages to replace tariffs with alternative direct or indirect taxes, these may have a gender-differentiated impact.

The theoretical framework provided by Elson *et al.* (2007) mentioned in Section 5.2 is useful to understand how gender inequality affects trade. The authors argue that gender inequality positions women more as sources of competitive advantage than achievers of competitive advantage (see Box 9 in Module 2). The former refers to women as unpaid family workers and wage workers contributing to businesses run by others; the latter refers to women as owners of businesses employing other people or as own-account self-employed producers. They observe that to achieve competitive advantage producers need access to land, technology, knowledge, freedom from other demands on their time, markets and a favourable policy environment. Many barriers prevent women from using these resources to compete with men. When female business owners or producers achieve competitive advantage, it is usually in a niche market, at the local level.

On the other hand, because of gender gaps in power in labour markets and households, women are a source of competitive advantage for producers using labour-intensive production methods. Gender bias in labour markets enables these producers to pursue a strategy that combines modern technology in transport and marketing with the use of cheap labour. Although export expansion in labour-intensive goods, both in manufacturing and agribusiness, seems to advantage women in terms of the availability of wage employment, the competitive advantage of firms that employ them depends on women's lower pay and poor working conditions.

Elson *et al.* (2007) conclude by noting that such strategies are not only bad for gender equality but also counterproductive for business as a whole in the long run, in that they undermine the conditions for a healthy and skilled labour

force. We will provide more details on the transmission mechanisms from gender inequality to trade in Module 3.

## 6 Case study on gender and trade: Angola<sup>28</sup>

We now present a country case study to understand more concretely the issues we have addressed in an abstract manner so far. The country we look at, Angola, has a specific gender pattern of employment which is a reflection of the country's socio-economic structure. The case study provides insights into the gender ramifications of trade-led structural changes in an oil-dependent country. Our choice of country was not accidental; indeed, by describing the Angola experience, our aim is to make the reader aware of the complexities that arise when investigating the relationship between trade and gender, as well as recognize that the outcomes are country-specific and cannot be generalized, though some policy implications can indeed be drawn and good practices identified.

At the end of this module, we will suggest a set of questions encouraging the reader to explore the issues related to trade and gender. At the same time, these are the questions that researchers and/or policymakers should think about when undertaking an empirical country-specific analysis on the interplay between trade and gender, or when assessing theoretical models about the ways trade and gender interact.

### 6.1 Basic facts about the economy

Angola is a country rich in natural resources, particularly mineral and oil resources. There are also rich fishing resources, and the abundance of arable land and favourable climatic conditions facilitate the growth of a variety of agricultural crops and the raising of livestock. However, the favourable land and environmental conditions enjoyed by the country have not yet translated into opportunities that would enhance the well-being of the population. The country faced forty years of armed conflict, which started in 1961 with the struggle for independence from Portugal and continued with the civil war that erupted immediately after Angola gained independence in 1975. Peace was only finally achieved in 2002. As a consequence of the long period of armed conflict, the agricultural and manufacturing sectors were seriously disrupted. A decade after the end of the war, Angola has made substantial progress in economic and political terms, but the distortions generated by the long internal conflict still affect the economy and society and have specific repercussions on women.

During the decade that followed the end of the armed conflict (2002–2011), Angola experienced an average annual growth rate of 12 per cent, making it one of the fastest growing economies in the world. Growth has been spurred by the massive reconstruction projects as well as high international oil prices. However, the combined effect of peace and high rates of economic growth have had a limited impact on the reduction of poverty. Inequality and levels of extreme poverty remain quite high: according to the World Bank, 67.4 per cent of the population lived on less than \$2 per day (in PPP) in 2009. Poverty is greater in female-headed households, especially in rural areas. Angola remains one of the most unequal countries in the world. In addition to overall inequality, there is a large cleavage between the rural and urban areas.

Regarding Angola's production structure, the extractive sector is predominant, with around 64 per cent of GDP in 2009. Services contributed to around 25 per cent of GDP, agriculture and fishing to around 8 per cent and manufacturing only to around 4 per cent. Despite the poor performance of agriculture, the sector remains the main source of income for the majority of the population and accounts for over 80 per cent of all jobs generated in the country. Female workers represent 70 per cent of all persons engaged in agricultural activities.

Angola is characterized by one of the largest informal economies in the developing world, the so-called *candonga*. Informal activities are estimated to contribute to approximately 45 per cent of the Angolan GDP and to provide a living to a significant proportion of the Angolan population, especially women.

## 6.2 The gender profile of Angola

The situation of women in Angola is still fraught with challenges inherited from the legacy of nearly forty years of conflict. This puts women at a disadvantage in terms of health, educational attainment and access to vital resources, such as land. As regards health, lack of access to reliable and consistent medical services puts women's health at risk and reduces their ability to participate in society and in the economy because of time spent taking care of the ill and old members of the family. Gender-based violence has been a serious problem in Angola, both during and after the conflict, and it aggravates women's precarious social status. Gender imbalance is marked in education: the adult literacy rate is 82.7 per cent for men and only 58.1 per cent for women. Seventy-eight per cent of girls and 98 per cent

of boys are enrolled in primary school. As a result, Angolan women face significant barriers in terms of resource and time availability in order to participate meaningfully in the country's social and economic development. On an encouraging note, however, women are well represented in decision-making positions.

The principles of gender equality and non-discrimination against women are enshrined in the Constitution and in the major laws of the country. The analysis of domestic policies shows evidence of Angola's commitment towards gender equality and of the government's resolve to consider gender issues and women's empowerment as a fundamental component of the national development strategy. Angola has a dual legal system based on Portuguese civil law and customary law. Customary law in Angola – as well as in several other African countries – may have a discriminatory effect on women, for example in terms of limiting their rights to property. At the international level, Angola is a party to the main regional and international conventions related to the advancement of women and the promotion of gender equality.

## 6.3 Basic facts about trade and trade policy

### 6.3.1 Trade structure and trade partners

The resource-based nature of the Angolan economy has determined both economic and political dynamics in the country. In 2011, Angola was Africa's second largest oil producer and the fifth largest diamond producer in the world. The expanding production of natural gas and other minerals has a great potential to boost exports.

The evolution of commodity exports in Angola since 2004 presents two important features: (a) the dominance of extractive activities, which in 2010 accounted for more than 99 per cent of all exports; and (b) a significant stability of the structure of exports over time, with products other than oil and diamonds showing limited dynamism and very low value. The country's integration into the world economy, mainly as an oil and to some extent a diamond exporter, has not contributed to diversify the economy, making it extremely difficult to develop domestic import-competing or export-oriented sectors and reinforcing the primary extractive character of the economy.

Angola is highly dependent on imports: during 2004–2010, imports experienced an annual average growth rate of 13.5 per cent. Import penetration is significant in most sectors.

As far as services are concerned, while imports show a very high annual average growth rate, exports, except for tourism, have demonstrated limited dynamism and low export value. The contraction of commercial services has suggested no diversification of service export activities of the types that have emerged in other developing countries and that represent a potential source of employment for the female labour force, such as health and information and communications technology (ICT) services.

Intra-regional trade remains very limited, as only 2.4 per cent of Angola's exports are destined to other South African Development Community (SADC) countries, mainly South Africa. In 2011, China and the United States accounted for the bulk of Angola's exports, with 37.7 per cent and 21 per cent of total exports, respectively. Imports mainly originated from Portugal and China, accounting for 19 and 16.3 per cent of total imports, respectively.

### 6.3.2 Trade-related arrangements and policies

Angola is a founding member of the WTO and, as a developing and a least developed country, it enjoys Special and Differential Treatment (SDT) with respect to WTO obligations and commitments, and benefits from non-reciprocal preferential treatment under a number of bilateral arrangements, such as the United States' African Growth and Opportunity Act (AGOA) and the European Union's Everything But Arms initiative.

In terms of tariffs, Angola has a high level of protection of domestic production in some sectors, with the overall goal of supporting the gradual process of import substitution for essential goods and boosting exports from the non-oil sectors. The highest average most-favoured-nation (MFN) applied rates affect tobacco, petroleum, fish and fish products, coffee, tea, and clothing. All remaining product groups face an average tariff close to or below 10 per cent. The average tariff levied on capital goods – traditionally linked to the extractive sector – is very low.

The protectionist policies implemented by the government of Angola to promote industrialization and enhance agricultural production, however, have so far not generated significant results. The domestic currency appreciation policy, which resulted from the "hard-kwanza"<sup>29</sup> policy pursued since 2002 in the framework of stabilization attempts, and the effects of the so-called "Dutch Disease"<sup>30</sup> artificially lowered the price of imports, while increasing the prices of non-tradable goods within the domestic economy. This con-

strained the diversification of the economy and created challenges of a structural and systemic nature for the country.

## 6.4 Trade and gender interactions

The participation of women in the economy and the female intensity of employment depend on the overall structural change in the economy, in particular the growth and decline of different sectors that can also be led by trade. To the extent that structural change generates job opportunities that match the skill level of the female workforce, a feminization of work can take place.

To understand how trade-led structural changes in Angola can impact the female workforce, it is necessary to look at the sectoral participation of women in the labour market. Women are concentrated in the agricultural sector, including fisheries, which is still a low-productivity sector. The urban informal sector is the second most important source of employment for the female workforce nationwide. The absolute number of women working in other sectors is very limited. In the formal economy, the main employers of women are the state, i.e. central and local administration, and traditional services such as health and education, which have a high propensity to hire female workers.

The small amount of disaggregated and time-series data available for Angola presents a serious limitation to the analysis of the effects of a trade-led transformation of the production structure on the feminization of labour in the country. Evidence based on the available data suggests that the limited structural transformation experienced by the Angolan economy since the end of the civil war in 2002 did not promote the empowerment of women. As a matter of fact, in the formal sector, the female workforce remains confined to non-tradable and low-productivity activities. The informal sector represents an important channel for the imports of goods in the country and has benefited from trade liberalization. The majority of women in Angola are employed in the informal sector and the trade-led expansion of informal activities has given them a chance to make a living.

As explained in Section 6.3, Angola's integration into the world economy mainly as an oil exporter has resulted in macroeconomic distortions (i.e. the excessive appreciation in the real exchange rate), tending to crowd out productive activities, such as agriculture and light manufacturing, which could absorb the female workforce and provide women with decent incomes. This challenges the stance

that structural issues (e.g. the “Dutch Disease”) are gender-neutral (UNCTAD, 2013).

Against this background, policymakers face the challenge of designing and implementing a set of policies aimed at reactivating the non-oil export sectors – particularly agriculture and light manufacturing – and spur the development of domestically competitive production. From a gender perspective, export diversification towards agriculture and light manufacturing can reward the female workforce, if gender-based constraints are acknowledged and redressed by means of gender-specific and, as warranted, redistributive measures.

Angola displays a significant growth and diversification potential in a number of staple foods and cash crops for export. As female workers comprise 70 per cent of all persons engaged in traditional agricultural activities, agricultural exports are expected to positively impact women’s welfare. For this to happen, however, sectoral policies that take into account the specific needs of women and gender division of labour should be put in place. They include access to rural finance through microfinance schemes backed by governments or non-governmental organizations (NGOs); access to agricultural extension services, in particular agriculture production techniques, marketing of produce and basic business management; access to inputs (e.g. improved seeds varieties and fertilizers) and facilities (e.g. warehouses); secure land tenure for women, including user rights to communal property; and restoring markets and marketing networks, which includes encouraging women’s associations and cooperatives.

The fisheries sector has significant potential for job creation in Angola and the experience of other developing countries suggests that women usually carry out many fishing activities. Policies geared at developing an export-oriented fisheries sector should ensure that women have access to upgraded facilities and receive training on fish handling/processing techniques and on micro-business administration.

Economic liberalization in Angola has so far not promoted the development of export-oriented manufacturing activities. The potential exists to reactivate Angola’s manufacturing capacity in sectors that have a comparative advantage. The production of differentiated, high-value and processed food products can offer significant opportunities of formal employment for relatively unskilled women.

Additionally, tourism is increasingly regarded as a sector with significant economic potential that could contribute to the diversification of the Angolan economy. However, excessive currency appreciation and lack of adequate infrastructure and skilled personnel constitute major challenges that hamper the development of the sector. Women’s participation in the services sector, particularly in tourism-related activities, is relatively low compared to other countries. In view of the high potential for women’s employment in this sector, initiatives could be put forward to bridge the gender gap in education and vocational training and encourage skill development. Most notably, by transferring a portion of the proceeds of the oil/diamond industry to dedicated funds, the government could leverage these revenues to unleash the commercial potential of sectors in which Angola has a comparative advantage, and to fund pro-poor and gender-sensitive social policies.

## 7 Mainstreaming gender in trade policy

The topic of gender and trade is receiving increasing attention in policy circles, but what are the concrete measures that could effectively contribute to gender-mainstreamed trade policies? This section aims to shed some light on the issue.

Mainstreaming gender in trade policy means ensuring that due consideration is given to gender inequalities and implications at every stage of the trade policy process: (a) the stage of generating relevant evidence to inform decisions on trade policy; (b) the stage of designing policies based on such evidence; and, later, (c) the stage of supporting interventions on the ground to enable their successful implementation. Below, we will provide examples of the kind of actions that may be needed to strengthen gender perspectives in trade policymaking at each of these three stages, especially when the negotiation of trade agreements is at stake. While the focus is on trade agreements, trade liberalization may also be pursued on a unilateral basis; therefore, similar actions would also be of relevance in such a case. Many actors have a role to play in this endeavour: the international community, ministries and other government agencies, trade negotiators, researchers and statisticians, as well as civil society organizations. One of the main challenges is to make sure that all of these actors get involved and that their actions are interconnected and well coordinated.

## 7.1 Comprehensive ex-ante gender impact assessments of trade agreements

Some countries/regions (mostly from the high-income group, such as the United States, Canada and the European Union) routinely undertake assessment studies before negotiating a trade agreement. These assessments tend to vary in scope and purpose, but could include, as standard practice, some sex-disaggregated analysis of the likely distributional effects of the trade measures that are being considered.

There is scope for the international community to offer assistance to developing countries interested in conducting gender assessments of trade agreements. UNCTAD already plays an important role in this area by promoting a range of initiatives in the area of technical support and capacity building. For example, through country-based analysis, such as the one presented in Section 6, it supports developing and least developed countries in mapping women's roles in the economy and examining the impacts of trade policies on women. Hands-on support is provided on the methodologies that can be used to gauge the impact of trade policy on women. Such activities enhance the research capacity in developing countries that forms the basis for assessing the potential gender-related implications of trade agreements.

Quality sex-disaggregated statistics and research capacity are the two key ingredients required for rigorous and comprehensive gender impact assessments. Both can be supported through a combination of actions at various levels. For example, technical and financial assistance to statistical offices should be aimed at promoting the collection of sex-disaggregated data on a more regular basis and for a wider range of relevant variables and dimensions. Local women's organizations could play a role by running economic literacy courses (which could encompass the basic concepts and tools for trade analysis) and work closely with statistical offices and government officials to encourage regular use of gender statistics in economic policymaking. The donor community could support independent trade research in key gender-relevant areas, including both qualitative and quantitative studies. Analytical capacity relevant to gender-aware economics needs to be built not only among researchers but also within ministries, and in those related to trade.

## 7.2 Negotiations of trade agreements

Two different issues should be addressed here: (a) possible inclusion in trade agreements of gen-

der-related provisions; and (b) the need to ensure that liberalization commitments are crafted in a way that also reflects the interest of women.

Some trade agreements make open reference to gender equality goals. The Cotonou Agreement,<sup>31</sup> for example, states that parties must respect international conventions regarding women's rights and urges the inclusion of a gender perspective in all areas of cooperation. Most of the ensuing *interim* or final EPAs signed in recent years, though, do not contain explicit gender-related provisions.

Would the use of specific provisions be an effective way of mainstreaming gender in trade agreements? The issue of social clauses based on core ILO conventions in trade agreements is quite a controversial topic. Those arguing for it believe that social clauses are important in that they establish internationally agreed universal rights which can be made to apply to all workers irrespective of country (e.g. Çağatay, 2001). Those arguing against (e.g. Kabeer, 2004) contend that they represent a new form of protectionism to keep imports from developing countries at bay and protect jobs in the North.

The evidence so far appears to be that when a labour side agreement is attached to a trade agreement, the enforcement mechanisms are weak. This is for instance the case of the North American Free Trade Agreement (NAFTA) signed in 1994 by Mexico, the United States and Canada, which includes a number of side agreements. The related North American Agreement on Labour Cooperation is the first case of workers' rights considerations, including the equality of women and men in employment and pay, being ever linked to a trade agreement in more than a passing manner. However, between the entry of the agreement into force and 2010, only 39 petitions were filed regarding labour rights violations by one of the NAFTA countries; of those around 70 per cent were accepted for review, while the others were rejected. All the cases reviewed ended in ministerial consultations and none reached more concrete levels of arbitration. In other words, trade sanctions were never used. It seems that no concrete improvements in the labour practices of the countries involved in the disputes have taken place as a result of the petitions, and the whole system has therefore proved rather ineffective (Nolan Garcia, 2010).

A study by UNCTAD (2009) highlights the similarities between the ongoing debate about the inclusion of gender clauses in trade agreements and the debate that was spurred in the 1990s

about the inclusion of environmental requirements. The debate saw developed and developing countries holding rather different positions. The latter were cautious about incorporating environmental considerations into trade agreements because they might result in trade barriers and because their implementation might represent a heavy burden in terms of financial costs and human resources. An additional argument invoked was that the size and economic weight of the country wishing to include environmental considerations in a trade agreement might play a disproportionate role in the outcome of the discussion. Moreover, some developing countries invoked the fact that they were called to negotiate environmental chapters in trade agreements while their national environmental frameworks were still in their infancy and needed further development. Similar arguments may be used as far as gender clauses are concerned. But which specific gender provisions could actually be included in a trade agreement? Possible examples are specific gender-related standards, such as equal working conditions for men and women, and enforcement and dispute-settlement mechanisms concerning compliance with gender-related provisions.

While the arguments presented above about the inclusion of environmental considerations in trade agreements truly reflect the constraints faced by many developing countries, raising the issue has also had some positive effects. These include: (a) increased awareness of the importance of environmental issues for development; (b) a broader participation of civil society in the negotiation and implementation of the agreements; and (c) easier channels (e.g. the Global Environment Facility) for developing countries to access funding for environment-related activities. In particular, point (c) further leads to enhanced dialogue and cooperation on environmental issues among the countries that are parties to the agreements as well as enhanced technical cooperation and capacity building on relevant environmental issues for developing countries that are parties to the agreement. Something similar may be expected should gender considerations be included in trade agreements. In any event, gender-related requirements need to be balanced and realistic, and take into account the economic and social contexts of all countries that are parties to the agreement.

With regard to the second issue mentioned above – the need for gender-sensitive content of the liberalization commitments – it is important to note that broad-based participation in trade consultations and negotiations is likely to increase

the chances that gender concerns are taken into account. Fostering collaboration among various government departments (trade, planning, women's ministry, statistical bureau, etc.), and enhancing the capacity of civil society organizations with regard to gender equality are important in this regard. Trade negotiators could, for example, be provided with a list of gender-sensitive sectors where trade liberalization should be expedited, delayed or exempted, to enhance female employment and empowerment. Ultimately, the commitments that a party is ready to take in the framework of a trade agreement should be beneficial to all segments of the population, including women.

### **7.3 Development assistance after the entering into force of trade agreements**

As briefly discussed in Section 7.2, gender-sensitive interventions are crucial to enable vulnerable women and men to take advantage of newly emerging trading opportunities. Interventions should not be limited to protecting a few traditionally “female” industries, such as textiles, or supporting well-established export sectors. They should also be aimed at enhancing the economic participation of women as a whole, and in particular in the production of goods with higher value-added content. Measures, especially in the areas of trade-related infrastructure and building of productive capacity, should be context-specific and could include, among others: financing road and other physical infrastructure projects that reduce women's time and energy burdens; designing agricultural vocational training and extension services to meet the specific needs of female farmers; conducting gender audits of trade-related administrative procedures; promoting institutional mechanisms at the government level that foster women's economic advancement and participation in the labour market, particularly focusing on small producers and traders; or ensuring that decisions on public expenditure and taxes in response to tariff revenue loss are based on a sound understanding of the gender implications of fiscal policies.

Multilateral development cooperation frameworks could also be used to support gender-sensitive interventions in trade-related areas. Programmes such as the Enhanced Integrated Framework (EIF) and the Aid for Trade Initiative (AFT) can play an important role in operationalizing gender mainstreaming and supporting governments in the implementation of gender equality goals within their trade strategies. For example, the Gambia's Diagnostic Trade Integra-

tion Study update, completed in 2013 within the EIF, may play a catalyst role in driving funds towards gender-sensitive projects in the fisheries sector. AfT and EIF resources are meant to be used following the principles agreed upon in the Paris Declaration on Aid Effectiveness,<sup>32</sup> in particular the principle of national ownership; it is the prerogative of the receiving countries to design their national development strategies and single

out the programmes and projects that will be instrumental in their achievement. The upgrading of facilities mainly used by women, the provision of training tailored to women on issues such as financial literacy and business planning, the setting up of e-platforms to enhance the capacity of female small operators to understand market requirements, are examples of activities that could be financed through EIF and AfT.

**Exercises and questions for discussion****General questions**

1. How can one examine the gender profile of an economy?
2. What are the most common indicators of gender inequality and which gender variables are the most relevant for trade analysis?
3. Some dimensions of gender inequality are not sufficiently captured in the analysis. Explain what they are and why it is difficult to include them in the analysis.
4. A number of indicators can be used to capture gender inequality in the domain of economic opportunities, one of them being the gender wage gap. Explain the different reasons for why a gender wage gap might be observed and the complications of measuring it.
5. Gathering reliable and updated sex-disaggregated data is difficult since many countries do not collect these data on a regular basis. An additional problem is that sometimes sex-disaggregated data are collected on the basis of criteria that are not completely adequate to capture reality, such as distinctions between female-headed and male-headed households. Explain why it is important to collect sex-disaggregated data and suggest some measures that could be used to improve the quality of data and their usefulness in carrying out gender analysis.
6. Trade openness “in practice” is distinct from trade openness “in policy”. Explain why these two concepts are different. Are countries that are open in practice necessarily also open in policy and vice versa?
7. What are the various measures and interventions included under the broad label of “trade policy”? Explain the difference between trade policy and trade liberalization.
8. What are the channels through which trade affects women’s economic empowerment and well-being? And what are the channels through which gender inequality affects trade outcomes? Which analytical frameworks are most useful to explore these linkages? What are the empirical findings?
9. Can one unambiguously establish that trade is good or bad for gender equality in a particular country? Are different country experiences comparable? Can we draw “general lessons”?
10. Beyond gender, what are the other most common sources of disadvantage that people may experience, and how do they intersect with gender-related disadvantages?
11. In your opinion, how easy is it to disentangle trade impacts from impacts of other policies that usually accompany trade liberalization, such as financial liberalization, public expenditure cuts or privatization?
12. Based on your knowledge, why do you think that fiscal policy is important to achieve gender equality, and when does fiscal policy become a source of discrimination?
13. In trade policy analysis, “the devil is in the detail”. How would you proceed if you were asked to assess the level of protection enjoyed by farmers in the specific staples that they produce or to evaluate the tariff and non-tariff barriers that may be faced in the export markets?
14. If gender-related requirements are included in the text of a trade agreement, all parties are bound to comply with such requirements. Explain the pros and cons of including gender requirements in trade agreements.
15. Beyond trade policy instruments, which other policies/measures (and in which areas) do you think may be needed to ensure positive economic and social outcomes for women? What kind of institutional mechanisms do you think would be needed for this to happen?

**Exercises and questions for discussion****Specific questions arising from the country case study**

The country profile of Angola sketched in Section 6 introduces a range of issues that deserve careful attention in a gender-aware analysis of trade.

1. Read carefully the country case study again and identify:
  - (a) The different roles women play in the economy;
  - (b) The sectors where women are mostly concentrated;
  - (c) Whether women are suffering from gender bias and if so, what type of gender inequality affects women and in what domain (i.e. capabilities, security, and access to and control over resources); (Hint: Keep in mind that women may suffer from different forms of gender bias according to their socio-economic roles and/or sector in which they work.)
  - (d) The trade policy context;
  - (e) The trade and gender interactions.
2. Suppose the government of Angola decides to implement an export-led growth strategy aimed at developing the agricultural sector. What policy measures would you suggest so that women might benefit from increased agricultural exports? Besides the agricultural sector, which other sectors could generate beneficial effects for women?
3. Angola is an oil-exporting country. Do you think it would be feasible to use revenues from the oil industry to promote women's empowerment? If yes, what measures would you propose?
4. How could the "Dutch Disease" impact women in Angola?

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