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A gender assessment of Myanmar and of the Inle Lake area with a focus on the agriculture and tourism sectors



UNITED NATIONS



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EXECUTIVE SUMMARY

This report presents an analysis of the agriculture and tourism sectors in the Inle Lake area of Shan State in Myanmar from a gender perspective. It investigates how to improve women's wellbeing through their participation in three selected agricultural value chains (tea, avocado and ginger) and in the tourism sector. The report provides policy recommendations for building linkages between the three agricultural value chains and the tourism sector to promote gender equality and women's economic empowerment.

The study is carried out within the framework of the Swiss Secretariat for Economic Affairs (SECO) – United Nations Cluster on Trade and Productive Capacity, Myanmar Project entitled “Enhancing horticulture supply and sustainable tourism to develop business linkages.” It is based on desk research, field observations and field surveys conducted by the United Nations Conference on Trade and Development (UNCTAD) in Hopong, Kalaw, Nyaung Shwe, Pekon, Pindaya, Pinlaung and Ywangan townships in Southern Shan in the last quarter of 2019. The surveys were carried out with (i) female farmers in the selected agricultural value chains; (ii) buyers and employers in the tourism sector; and (iii) local and international nongovernmental organizations (NGOs) and development agencies working with women in the agriculture and tourism sectors and with farmers' associations.

Background

Myanmar is a rural country, with 70 per cent of its population living in rural areas and relying on crop, husbandry and livestock for livelihoods and incomes. Agriculture contributes to 30 per cent of GDP, 25 per cent of exports and 56 per cent of employment. Myanmar is included on the United Nations list of least developed countries. Eighty per cent of employment is in the informal sector.

Since the country began moving towards a more democratic system of governance at the end of the first decade of the 2000s, the government has started a series of economic reforms to modernize and open Myanmar to the world. However, women

have benefited little from this wave of modernization, mainly because they have been by and large absent from policy- and decision-making processes. That situation is improving, and a National Strategic Plan for the Advancement of Women¹ has been developed and is being implemented.

Shan State is the most diverse area of the country, with 33 recognized ethnic groups and languages. Despite these differences in ethnicity, the townships and value chains selected in this report share many similarities. In all selected townships, agriculture plays a key role in the economy and economic activities revolve around the family unit, with gendered roles embedded in that family structure.

Myanmar has a history of internal conflicts that have greatly affected Shan State. The security situation has been improving thanks to the 2015 Nationwide Ceasefire Agreement, but it is still fragile. The connection between armed groups and the drug trade fuels insecurity and limits mobility. For women, the presence of soldiers can lead to additional security concerns, including gender-based and sexual violence.

The COVID-19 pandemic

In the first months of 2020, the world experienced an outbreak of the coronavirus disease (COVID-19), with social distancing measures and border closures introduced world-wide that have caused an unprecedented disruption in economic activity. Despite the relatively limited spread of the disease in Myanmar, the country is expected to be disproportionately affected by the pandemic in socioeconomic terms.

Like previous shocks, the COVID-19 pandemic is not gender-neutral. The sectors most affected by the pandemic include tourism, manufacturing, transport and agriculture. Notably, tourism, agriculture, and the garment industry within manufacturing are all female-intensive sectors. In addition, 86 per cent of women in Myanmar work in the informal sector, which implies that they are excluded from the rescue measures put in place by the Myanmar government,

¹ The National Strategic Plan for the Advancement of Women (2013-2022) is available at: https://myanmar.unfpa.org/sites/default/files/pub-pdf/NSPAW2013-2022_0.pdf

unless such measures are expanded to cover all workers. Women also have to increase the time they spend on unpaid work during the lockdown given their role as primary caregivers within the household. Finally, health emergencies such as COVID-19 often exacerbate domestic violence, which needs to be taken into consideration. The Myanmar government launched the COVID-19 Economic Relief Plan (CERP) in late April 2020 to mitigate the negative impacts of the health crisis on the economy and facilitate the recovery process.

The legal and institutional frameworks for gender equality

Myanmar's Constitution (Article 348) prohibits discrimination based on race, birth, religion, official position, status, culture, sex and wealth. However, the Constitution refers to women mainly as mothers, therefore reinforcing the society's gender stereotypes, and allows for certain jobs and positions to be reserved for men (Article 352). The 2013–2022 National Strategic Plan for the Advancement of Women, the Action Plan for Women's Entrepreneurship, and the Strategic Plan on Reproductive Health are part of the legal and institutional framework that aims to address women's empowerment in economic and social life in Myanmar. There are also laws that help promote gender equality in the labour market, including the 2013 Minimum Wage Law, which establishes that both women and men are entitled to be paid the legal minimum wage, and the 2013 Employment and Skill Development Law, which provides for the creation of job opportunities and the enhancement of worker skills, without discrimination on the basis of sex. The 2018–2030 Myanmar Sustainable Development Plan considers gender equality as a cross-cutting issue to be mainstreamed throughout implementation of the plan. Moreover, many provisions of the plan have the potential to benefit women, and especially women farmers, by strengthening land tenure, providing more education and training for women, linking women's production to markets, providing market information, and making financial support available to women-led enterprises.

In Myanmar as in many other countries, however, there seems to be a disconnect between the gender equality goals, on the one hand, and the political willingness, resources and mechanisms available to make such goals a reality, on the other. The United Nations Committee on the Elimination of Discrimination against

Women observed in 2016 that Myanmar had not fully implemented the Convention on the Elimination of all Discrimination against Women (CEDAW) almost 20 years after ratifying it. The fact that many institutions are involved in implementation of several pieces of new legislation does not provide clarity on rights and obligations. Some important laws, such as the Prevention and Protection of Violence against Women Bill, have been under discussion for years but approval is still pending. Customary principles and norms may impinge on the gender equality principles enshrined in statutory laws.

Access to land is a critical issue in a country like Myanmar, where more than half of the population is employed in agriculture. Customary tenure, informal settlements, landlessness, land grabbing, use of public lands, water access and forest rights are the main challenges with respect to land tenure. The 2012 Farmland Law establishes landholder rights to inherit and transfer the use and occupancy of land through land use certificates. The language included in the various pieces of land legislation and policy is gender-neutral, but it does not address the obstacles faced by women in realizing their right to land. In Myanmar, women seldom are recognized as landowners due to gender biases and stereotypes regarding land use and the complex and costly land registration and transfer process. Women also have limited participation in land-related decision-making at the village level. In the Inle Lake area, customary land use and land governance are rather well structured and, therefore, land use issues, conflicts and disputes are infrequent.

Labour market regulation is another area where there is need for progress. Myanmar has not yet ratified several International Labour Organization (ILO) core conventions, including those on equal remuneration; employment and occupation discrimination; and domestic workers. The Ministry of Labour, Employment and Social Security has identified 17 pieces of outdated and discriminatory labour legislation for reform. The inclusion of gender equality and women's rights into labour legislation and social security law remains an unresolved issue.

Gender inequalities in different domains of economic life

Gender norms, stereotypes and customs shape how society is organized and the division of labour in Myanmar. In agriculture, for example, the role

of “farmer” is predominately reserved for men despite women’s significant contributions to the sector. Gender segregation is very prevalent in the labour market. While men hold the role of principal breadwinner and dominate skilled occupations and sectors in the economy, women are highly segregated into traditional, low-skilled professions and experience a gender wage gap. Women are the main providers of unpaid domestic and care work. Gender segregation is also evident in leadership roles.

Gender inequalities in the economy create disadvantages for women’s prospects to develop businesses. For instance, land tenure issues and the uncertainty about land ownership result in poor investment in agriculture in Myanmar, especially for women farmers, whose names rarely appear on land tenure and use contracts. Gender biases are also present in the negotiation of contracts with suppliers or clients. While women have a stronger say in negotiating the quantity and price of inputs, it is mainly men who negotiate the purchase of machinery and more sophisticated equipment.

The employment structure in the Inle Lake area has a clear gender pattern. Agriculture accounts for more than 80 per cent of employment for both men and women in Hopong, Pekon, Pindaya, Pinlaung and Ywangan, well above the national average of 56 per cent. Taunggyi is the only township where services provide the major source of employment for both men and women. Within services, wholesale and retail trade is the most important employment sector; accommodation and food services account for 9 per cent of women’s employment in Taunggyi and around 6 per cent in Kalaw and Nyaung Shwe, and its share is much smaller in other townships for both men and women. The industrial sector plays a very small role in employment generation in most townships except Taunggyi, Kalaw and Nyaung Shwe.

Women predominate the traditionally female-intensive services sub-sectors such as accommodation and food services, wholesale and retail trade, and to some extent public and social services. Men dominate the industrial sector and the transport, storage and communication services sub-sectors. In line with the dominant role of agriculture in employment, women in all of the townships mainly work as unpaid family workers and own-account workers – both of which are

vulnerable forms of employment, according to the ILO. Overall, vulnerable employment is very common among employed women in the Inle Lake area. Developing agricultural value chains by establishing links to other sectors of the economy such as tourism would contribute to shifting women from subsistence farming to commercial production and reducing their levels of vulnerable employment.

Women’s participation in decision-making processes in politics and businesses and within households is critical for their active involvement in decisions pertaining to their wellbeing and for expressing their agency. As of 1 June 2020, Myanmar ranked 162nd out of 193 countries with respect to women’s representation in Parliament – the second-lowest ranking country in Southeast Asia after Sri Lanka. The situation is better as far as administrative positions in ministries and managerial positions are concerned. Women also exercise their decision-making power at the household level in a stronger way than in politics. Women’s organizations and self-help groups play an important role in strengthening women’s decision-making power through training and advocacy programmes.

Shan State faces important challenges in terms of education and training. In fact, as of 2017 it had the lowest adult literacy and numeracy rates among all states in Myanmar. Among women in Shan State, only 57 per cent reported being literate and 68 per cent numerate. Although there is high demand for vocational and technical training, only a small share of that demand is met and there is discontent with the available programmes due to their short duration, one-time nature without any follow-up, and poor content not tailored to the needs of the target population. Farmers in the region have also highlighted the lack of support mechanisms to help them access the necessary resources to start or expand their businesses. Similar findings were found for the tourism sector, especially with respect to the mismatch between training and the skills needed in the labour force.

Agriculture and tourism sectors in Myanmar

Low productivity, inequality and high price volatility are among the main characteristics of the agriculture sector in Myanmar. The 2018/2019 – 2022/2023

Myanmar Agriculture Development Strategy and Investment Plan² aims to expand agricultural and livestock production, increase farmers' incomes, and enhance farmers' access to international markets. The plan identifies gender inequality and insufficient women's rights in agriculture as a weakness of the agricultural system and includes several goals to overcome it. Overall, inclusiveness and increased women's participation are regarded as the pre-condition for the plan to yield results.

In the three agricultural value chains covered by this study – tea, ginger and avocado – a gender-based division of labour is common to all townships. Men are more involved in tasks related to the preparation of the soil or ploughing, while women's work is usually related to planting, weeding, transplanting, harvesting, threshing, postharvest work and marketing. Farmers view agriculture as a traditional activity rather than a business, which is an important obstacle to developing and modernizing the sector. Coupled with the many supply-side constraints faced by farmers, this perception of agriculture as a traditional activity results in the failure of farmers to meet the quality and quantity standards required by traders, processors and final consumers.

Most women farmers from the Inle Lake area sell their products to traders or processors. In rare cases, they sell directly to enterprises, such as tourism outlets, mostly through contracts established by an NGO or another institution. Among the women farmers interviewed by UNCTAD, all sell their products in their own townships in the Inle Lake area, 60 per cent sell in other markets in Shan State, only a few sell outside Shan State, and none sell in foreign markets. More than two-thirds of the farmers cited limited production capacity as the main obstacle preventing them from selling their produce abroad. That constraint was followed by lack of certification, inadequate financing mechanisms, and insufficient support by export promotion agencies. UNCTAD's survey of associations also found women's limited entrepreneurship skills, time poverty, and lack of self-confidence, as well as gender stereotypes, to be the most serious impediments to the expansion of women's businesses.

The shift to higher-value-added products and better access to market information were singled out by the associations as key areas of intervention that would strengthen women's businesses and set up linkages with the tourism sector.

Ginger and avocado are rather new commercial crops in the Inle Lake area. Conversely, tea has been produced and marketed there for a long time. Women in the area are involved in producing one or more of the three selected products and often grow them along with other fruits and vegetables.

In terms of the tourism sector, the 2012 Myanmar Responsible Tourism Policy provides the platform for developing tourism strategies at the national and regional levels. Myanmar's 2013–2020 Tourism Master Plan includes seven cross-cutting issues, including gender.³ The plan encourages community-based tourism, which provides employment opportunities for local people, contributes to preserving local cultural heritage, and can be particularly beneficial to women. However, it is unclear how implementation of the plan will be monitored, including its goals of gender inclusiveness.

The Inle Lake area is the most popular tourist destination in Southern Shan and tourism has grown rapidly in the area. Gender division of labour is also present in tourism. According to UNCTAD's survey of buyers, women are highly present in low-skilled job positions in such areas as cleaning and kitchen work and also carry out more skilled tasks, such as accounting and clerical work. Women are also active as entrepreneurs in the hospitality sector in the Inle Lake area.

Restaurant and hotel owners who participated in UNCTAD's buyer survey share their purchasing needs with suppliers, but do not provide any formal training to them. Buyers' needs include fresh products, compliance with hygiene standards, reduced use of pesticides and other chemicals, and proper packaging. Most local low-range hotels and restaurants rely on local markets to buy the products they need, while direct purchases from farmers are the second most used source of supply. Supermarkets do

² The 2018/2019–2022/2023 Myanmar Agriculture Development Strategy and Investment Plan is available at: <http://extwprlegs1.fao.org/docs/pdf/mya180003.pdf>

³ The 2012 Myanmar Responsible Tourism Policy is available at https://www.hss.de/fileadmin/media/downloads/Berichte/121015_Myanmar_Tourism_English.pdf. The 2013–2020 Tourism Master Plan is available at <https://tourism.gov.mm/wp-content/uploads/2019/05/myanmar-tourism-master-plan-english-version-min.pdf>.

not constitute an important source of supply either for hotels or restaurants. High-end hotels and restaurants rely on trusted producers who can ensure the supply of products that meet quality and safety standards.

Building linkages between the agriculture and tourism sectors

The domestic and external economies are linked via tourists who, while abroad, consume agricultural goods and services either directly - for example by visiting farms, or indirectly through hotels, restaurants, and other tourism outlets. Domestic farmers and foreign tourists are also linked via agricultural exports that extend the period of consumption of domestic goods by tourists during the period preceding or following their travel (Fisher, 2019). The same model can apply to domestic tourists coming from other states in Myanmar who visit Southern Shan.

Farmers sell their produce to local shops/stalls or other forms of intermediaries from which tourism enterprises buy their agricultural produce. It is also possible to sell directly to hotels, restaurants and large buyers such as supermarkets, though it is less frequent. There is a need to match buyers' and sellers' expectations and to introduce the infrastructure necessary to facilitate this match. Indeed, the UNCTAD buyer survey found that tourism operators expect central and local governments to make the necessary investments in infrastructure (e.g. transportation and roads, storage, processing and packaging facilities, electricity and water, equipment and technology, etc.). Tourism operators also called for support to farmers to help them develop their production, processing and entrepreneurial skills, which would allow farmers to become reliable partners for the tourism sector.

There is also a need to create incentives for farmers to reach out to the tourism sector. Producer associations can be instrumental in this regard. Community-based tourism can also support the establishment of linkages between the agriculture and tourism sectors by linking visits to tourist attractions with a stay on a farm and by creating positive spillover effects to rural communities, including women farmers, through market demand for handicrafts, cultural tourism products and services, as well as agricultural products.

Government could encourage tourism companies such as hotels, resorts, and tour operators to add local cultural excursions to nearby farms in the three

horticultural value chains, which are owned or run by women, as supplementary services. Pilot contract farming projects could also be developed in each value chain. Tourism companies could incorporate new local products and services into their tourism service packages to support women farmers. For example, by introducing local food sections into hotel menus and/or organize local food night events while sourcing local produce including tea, avocado and ginger from women farmers in the area. Other possible initiatives include providing locally-made complimentary gift packages for hotel guests which include products made from tea, avocado and ginger by women farmers in the region, or setting up small stores or sales stands at hotels and resorts to display and sell products produced by women farmers.

Government could introduce labelling programmes such as "locally made by women of Inle Lake" which identifies products produced by local women farmers, and "sourcing locally from women farmers", which positively distinguishes tourism companies that source locally and buy mainly from women farmers. In addition to labelling, which could become a tool of advertisement, government with the support of international development programmes could provide financial incentives to tourism companies that shift their procurement practice to suppliers that source locally and mainly from women farmers. Women farmers could be supported to develop high value-added products and supplementary recreational, educational and cultural services that could be sold to tourists during farm visits, farm stays and cultural festivals.

In addition to measures to facilitate both direct and indirect farmer-tourist interaction, it is equally important to address supply-side constraints faced by farmers in general and more severely by women farmers. This way, it would become possible to enable women farmers to better benefit from sectoral linkages between the selected agricultural value chains and the tourism sector in the Inle Lake area.

Extension services

Access to extension services, especially regarding modern farming techniques and/or the enhancement of crop varieties, is a key supply-side constraint faced by farmers, and more pronouncedly by women farmers, in Shan State. Most extension services provided by the government are reserved for holders of land titles and hence exclude many producers, most

of whom are women. Those without a land title need to go through an application process. Existing extension services also primarily reach men because they do not take into consideration women's time and mobility issues. In addition, the extension services provided by the government largely fall short of demand. This is the result of many factors, most notably the lack of resources to support the travel of field officers to villages to deliver training programmes. Farmers' associations could deliver extension services, but they are relatively new bodies in the area with limited experience.

Finally, there is a need to combine training on women's empowerment and gender equality issues with technical training that targets aspects of production and business management. Technical trainers need gender sensitivity training because they have limited exposure to gender issues.

Inputs, technology and information

Adequate access to inputs, technology and information is critical for value chain development and women's empowerment within value chains. It is therefore necessary to enhance access to good-quality and appropriate inputs and to build supply-side networks for farmers in Shan State.

Access to technology (e.g. machinery, equipment and tools) is another major impediment to increasing agricultural productivity. In the Inle Lake area, production is labour-intensive and there is little evidence of contract farming or other systems to promote scale access to technology. Gender inequality is evident in access to technology, as it is mainly men who first learn how to use a new technology when it is acquired. An issue for women farmers is having the financial means to buy or rent new machines in order to be able to compete with other farmers.

Information on market prices and the varieties and quality of produce is mostly accessible on an ad hoc basis through merchants, brokers, retailers and truck drivers. Information on new markets, including international markets, is not formally provided. Access to market information remains a big challenge for women farmers, according to UNCTAD's surveys. There is a need to replace traditional sources of information such as word of mouth with systematic information delivery, including online platforms, mobile applications and local newspapers. Producer associations and women's self-help groups play a role

in facilitating women's access to information in the Inle Lake area, so they need to be supported.

Infrastructure: transport, roads, water, electricity

Access to infrastructure such as transportation, roads, water and electricity is critical for all farmers. It is a more important issue for women than men because limited availability of basic infrastructure affects women's security and their participation in paid work. Projects that facilitate access to markets are important for the selected value chains. For instance, within the ginger value chain, a project by the Myanmar Institute for Integrated Development (MIID) developed a seed bank facility that helped farmers develop linkages with markets.

Transportation and roads constitute another area where there is much room for improvement in the Inle Lake area. According to UNCTAD's farmer survey, women rely heavily on private transport to reach markets, but they consider such transport unreliable and face challenges in terms of time and security to reach pick-up and drop-off points. Therefore, when planning new infrastructure, it is critical to ensure that it is gender-sensitive by taking into consideration women's mobility limitations and needs.

Energy access also has a gender dimension because women's micro-enterprises are often heat-intensive (e.g. food processing) or light-intensive (e.g. home-based cottage industries with evening work). Electricity services also need to be developed in the area for tourism development. Finally, access to water is a challenge in the Inle Lake area. Most farmers do not have access to irrigation technology and depend on rainwater and well/spring and river/lake water. According to UNCTAD's buyer survey, access to reliable sources of clean water is among the key factors to improve women's business activities.

Finance

Access to finance is one of the most important supply-side constraints faced by producers in general. Accessing low-interest-rate loans is critical for investment and business development. It is also important for the survival of firms during downturns. In Shan State, borrowing is mainly dominated by informal sources such as friends, family or other informal lenders. Women are more likely than men to report borrowing money from family and friends, women's self-help groups and NGOs, instead of from government agencies or village funds. Microfinance

institutions and international development programmes are also relevant for accessing finance in the area. However, the ceiling on micro loans is too low for such loans to support serious investment in higher-value-added production. International donors often have strict procedures for loan applications that can exclude their target population.

The development and modernization of agricultural value chains by establishing links to other sectors of the economy such as tourism has the potential to help

shift women's businesses from subsistence farming to commercial production, with positive outcomes for the women, their communities, the Inle Lake area and the country as a whole. For this to happen, it is necessary for central and local governments to address the many shortcomings women face in the private and public spheres to unleash their potential as identified in this study. Development agencies and local and international NGOs, self-help groups, and producer associations can be strong allies to reach these goals.

INTRODUCTION

This report provides a gender assessment of a specific part of Myanmar, the Inle Lake area in Shan State, and focuses on the agriculture sector, particularly the tea, avocado and ginger value chains,⁴ and on tourism. It examines how to improve women's wellbeing in Shan State and the Inle Lake area through their participation in economic activities, especially in the agriculture and tourism sectors. Specifically, the report analyses the barriers that hamper women's beneficial participation in these economic sectors and impede establishing linkages between each of the three agricultural value chains and the tourism sector. Developing and strengthening such linkages would likely contribute to women's empowerment and gender equality, as well as to economic development in the area.

The study was carried out within the framework of the Swiss Secretariat for Economic Affairs (SECO)–United Nations Cluster on Trade and Productive Capacity, Myanmar Project entitled “Enhancing horticulture supply and sustainable tourism to develop business linkages.”⁵ The report contributes to meeting two outputs of the project.⁶ It is directed toward policymakers at the union and state level, stakeholders in the private sector and civil society, women's organizations, development agencies, and scholars interested in the topic. Moreover, the gender analysis included in the report is meant to facilitate

addressing gender equality as a cross-cutting issue within entire projects.

The report is based on desk research, field observations and the findings of three surveys administered by UNCTAD in Hopong, Kalaw, Nyaung Shwe, Pekon, Pindaya, Pinlaung and Ywangan townships in Southern Shan in the last quarter of 2019.⁷ The surveys were carried out with (i) female farmers in the selected agricultural value chains; (ii) buyers and employers in the tourism sector; and (iii) local and international NGOs and development agencies working with women in the agriculture and tourism sectors and with farmers' associations. More details on the surveys are presented in the Annex.

After providing a brief background on Myanmar and more specifically on Shan State and the Inle Lake area, the report deals in section 2 with the gender impact of the COVID-19 pandemic. Section 3 presents the legal and institutional frameworks put in place to foster gender equality and enhance the position of women in the economy and in society. Section 4 assesses gender inequalities in the country and in the Inle Lake area more specifically. Section 5 analyses the agriculture and tourism sectors with a focus on women's roles. The report concludes with policy recommendations in section 6.

⁴ The three value chains of tea, avocado and ginger were selected by the implementing agencies of the United Nations Trade Cluster after a thorough consultation with stakeholders. The selection was motivated by the fact that tea, avocado and ginger offer opportunities for inclusive growth and may be able to drive sustainable change within the market system.

⁵ The overall objective of the project is: “Improve the economic situation in Inle Lake area (Shan State) through upgrading horticulture supply capacity and sustainable tourism in view of establishing value chains leading to income generation (for male and female farmers, workers and Small and Medium Enterprises), and employment (jobs created / retained), as a contribution for poverty reduction”.

⁶ Output 1.3: “The capacity of the national partners is improved for the development of sustainable business operations. Capacity building through expertise on policy reforms and business linkages for enterprise development. Awareness raising with focus on gender-specific constraints and opportunities in the horticultural and tourism sectors of Shan State”. Output 2.5: “Improved capacity of Inle Lake area stakeholders and policy makers within the tourism sector to design and implement policies that promote gender equality and women's empowerment by establishing gender-inclusive and sustainable business linkages between the agriculture and tourism sectors.”

⁷ The selection of the villages within each township was made jointly by UNCTAD and local partners. Time and financial constraints also defined the extent and reach of each survey. The ethnic groups living in the area covered by this study include the Shan in Taunggy and Pekon; the Intha in Nyaung Shwe; the Danu in Ywangan; the Taung Yoe (sub-ethnic group of the Bamar) in Pindaya (also in Kalaw, Pinlaung, Taunggyi and Nyaung Shwe); and the Kayan in Pekon.



1. Background



1. BACKGROUND

1.1. GENERAL CONTEXT

Myanmar is a rural country. According to the Ministry of Agriculture, Livestock and Irrigation (2018), agriculture contributes 30 per cent to GDP, represents 25 per cent of exports, and generates 56 per cent of employment. About 70 per cent of the population lives in rural areas and relies on crop, husbandry and livestock for livelihoods and incomes. Eighty-five per cent of rural people live in poverty and 24 per cent of rural households are considered vulnerable. Myanmar's economy is one of the least developed in Southeast Asia, and the country is included on the United Nations list of least developed countries. Although Myanmar aims to diminish its dependence on agriculture and switch to manufacturing and services, the manufacturing sector has not grown at the same pace as in other countries in the region. Informal employment constitutes 85.7 per cent of total employment in the country and mainly characterizes the agriculture sector (ILO, 2018a). Production and export of opium and other drugs play an important role in the economy and are intertwined with ethnic conflicts. Indeed, there is a connection between drugs and conflict in Myanmar, with the drug economy supporting the conflict and in turn the conflict facilitating the drug economy (UNODC, 2019).

Since the end of the first decade of the 2000s, when the shift to democracy started in Myanmar, the government has embarked on a series of economic reforms to modernize the country and open it to the world. Reforms have touched upon many issues, including corruption, the exchange rate, taxation, land ownership and foreign investments. The government has also made efforts to boost agricultural

productivity, modernize the financial sector, and develop infrastructure, especially transportation and electricity. Nevertheless, many decades of isolationism and sanctions are still taking a heavy toll on the development of the country.

Women have benefited little from this wave of modernization for several reasons: first, because they were by and large absent from the policy- and decision-making process;⁸ second, because gender equality and women's rights were not among the priorities of the government;⁹ and third, because social norms and attitudes limited the tasks and functions that women could undertake. However, the situation is improving, and a National Strategic Plan for the Advancement of Women has been developed and is being implemented through inter-ministerial collaboration, with the support of the United Nations, civil society organizations and development partners (see section 3.2.1). Myanmar is also involved in the Association of Southeast Asian Nations' (ASEAN) Committee on Women (ACW).¹⁰

Myanmar has a complex administrative structure (box 1). Shan State covers 25 per cent of Myanmar's territory (figure 1), and, according to the 2014 census,¹¹ has a population of 5,824,432.¹² Its location, the fertility of its land, and its abundant natural resources could make it a prosperous area and a trading hub. However, a number of hurdles are hampering its potential, including conflicts, insecurity, economic- and conflict-related displacements, poor infrastructure (especially roads and electricity), lack of entrepreneurial skills (especially in agriculture), limited availability of technology, and the widespread use and trade of drugs, which also have a negative impact on the availability of capable human resources. Agriculture is the principal economic activity in Shan State for both women and men.

⁸ Myanmar has a history of low female participation in public decision-making. Military rule between 1962 and 2011 banished women from positions of authority. See section 3.3.3 for more details on women's access to decision-making.

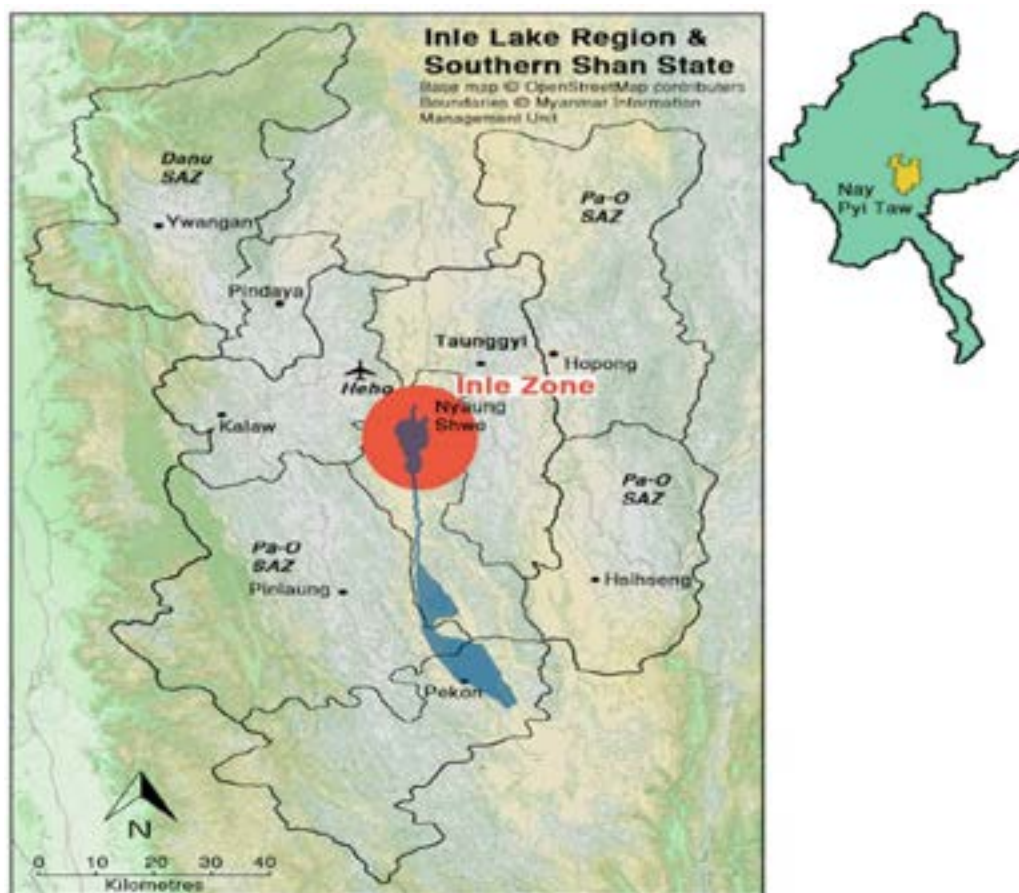
⁹ The national machinery for the advancement of women was launched in 1996, but its implementation is still ongoing. In 2016, the United Nations Committee on the Elimination of Discrimination against Women lamented the lack of a comprehensive strategy to eliminate patriarchal attitudes and discriminatory stereotypes against women, and the presence of discriminatory laws (CEDAW, 2016a). See section 3.2 for more details on Myanmar's legal framework on gender equality and women's empowerment.

¹⁰ The ACW is a subsidiary body of the ASEAN Ministerial Meeting on Women (AMMW). It is composed of senior officials in the respective ministries in charge of women and girls. The ACW supports AMMW by recommending regional policies, developing and implementing the five-year regional work plan, and managing partnerships.

¹¹ The 2014 Myanmar Population and Housing Census is available at: <http://themimu.info/census-data>.

¹² The country has roughly equal numbers of women (2,913,722) and men (2,910,710).

Figure 1. Map of the Inle Lake area and Southern Shan State



Source: Myanmar Information Management Unit.

Box 1. Myanmar's administrative structure

Myanmar is comprised of seven states and seven regions, which constitutionally are regarded as equivalent, six self-administered zones (SAZs), and one union territory where the capital Nay Pyi Taw is located. Each state/region is formed by several districts, and each district by townships. Townships consist of towns, urban wards, village tracts, and villages. Villages are the smallest formal administrative unit in Myanmar.

At the national level – the union – government ministries are the primary channels for implementing policies. States and regions are led by a chief minister, by a cabinet of state/region ministers, and by state/region judicial institutions. Districts are headed by a senior official from the General Administration Department (GAD) of the Ministry of Home Affairs. Township administrations are also headed by a senior official of the GAD and do not have a body of elected representatives. Villages are led by village heads who are elected by village inhabitants (Nixon et al., 2013).

In the case of Shan State, an additional layer of complexity is added because it hosts five SAZs: Danu, Kokang, Pa-O, Pa-Laung and Wa. Two SAZs (Danu and Pa-O) are in the area covered by this project's activities. The Shan State government administers the areas that are not part of the SAZs through district GAD commissioners and township administrators. The SAZs are administered directly by the SAZ "leading body," which includes 10 members.

1.2. ETHNICITY IN SHAN STATE

There are 135 different officially recognized ethnic groups in Myanmar (Ministry of Agriculture, Livestock and Irrigation, 2018). Shan State is the most diverse area of the country, with 33 recognized ethnic groups and languages. While Burmese is Myanmar's official language, rural communities tend to have little command of it and speak local languages.

It appears that belonging to a specific ethnic group, more than living in a given township, defines women's and men's role in society and the economy. Indeed, an ethnic group's geographical coverage may include several townships, but the group's customs and rules still must be respected by all members of the group regardless of where they might live.

Studies of the Inle Lake area and Southern Shan suggest that inhabitants are not only ethnically different, but also that the level of development of the townships and the gender disparities across the area differ. For instance, while ethnic minority women tend to be excluded from land ownership, rules vary across ethnic groups according to customary practice, with some groups allowing equal inheritance rights for men and women, and others denying it (USAID, 2018; MEDA, 2015).

Despite differences in ethnicity, the townships and value chains selected in this report share many similarities in terms of customary law, labour structure and business environment, as will be discussed in the following sections. More specifically, in all selected townships, agriculture plays a key role in the economy and the family is the unit around which economic activities revolve, with gendered roles embedded in it.

1.3. CONFLICTS IN SHAN STATE

Myanmar has a history of conflict at both the national and sub-national levels that has greatly affected Shan

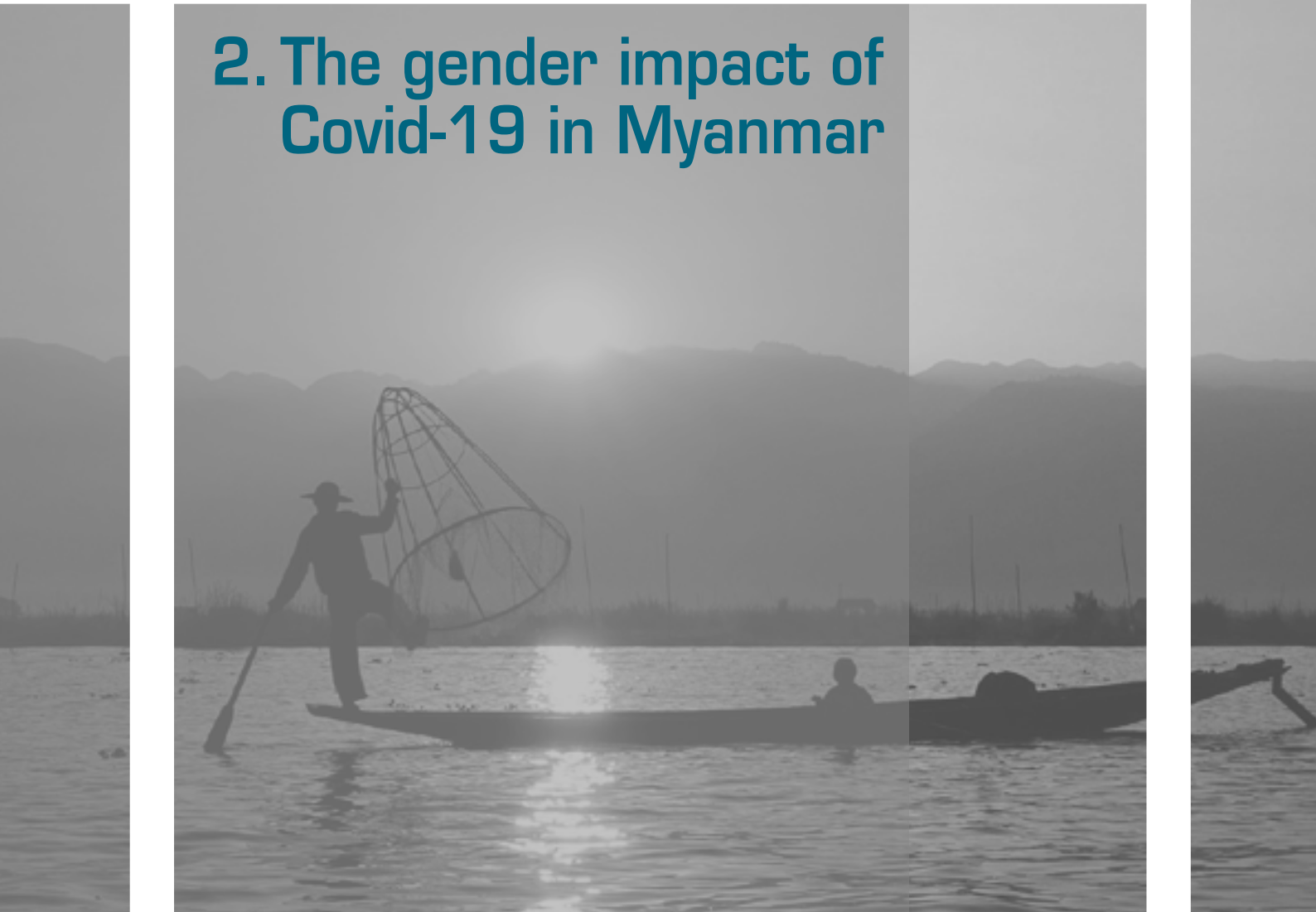
State. The security situation has been improving thanks to the 2015 Nationwide Ceasefire Agreement signed by armed ethnic organizations. However, the situation is still fragile and the most influential armed ethnic organization in Southern Shan, the Restoration Council of Shan State - Shan State Army-South (RCSS/SSA-S), is still actively fighting the Tatmadaw (the official Myanmar army) (SDC, 2018).

The connection between armed groups and the drug trade fuels insecurity and limits mobility. Drug production and profits are now so huge that they overshadow the official economy. Trade in illegal drugs is an impediment to peace and security. It generates revenues for all kinds of armed groups and therefore contributes to keeping them mobilized. The drug trade attracts transnational criminal groups that spread a culture of bribes and corruption, and in turn fuels the complaints of ethnic minority communities perpetuating civil war (International Crisis Group, 2019).

For women, the presence of soldiers leads to additional security concerns. According to interviews by Amnesty International and to a Declaration by Shan State's women's organizations, soldiers are responsible for widespread gender-based and sexual violence against minority women and girls, and the soldiers benefit from immunity. The United Nations Human Rights Council (2019) stated that violent conflicts and resulting gender-based violence affect everybody but take a particularly heavy toll on women and girls. There is a full range of human rights violations against women in conflict that goes beyond sexual violence and includes gender-differentiated impacts of forced displacement, enforced disappearances, and the destruction of civilian infrastructure. Moreover, in civilian populations that have been forced into internally displaced persons camps, women and girls disproportionately experience the negative impacts of camp life.



2. The gender impact of Covid-19 in Myanmar



2. THE GENDER IMPACT OF COVID-19 IN MYANMAR

In the first months of 2020, the world experienced an outbreak of the coronavirus disease (COVID-19) that was soon declared a pandemic. Social distancing measures introduced across the globe prompted an unprecedented disruption in economic activity, and a combination of domestic and external shocks worldwide has led to the worst economic and social crisis since the Great Depression. According to June 2020 projections by the International Monetary Fund (IMF), the world economy is expected to contract by 4.9 per cent in 2020 and then start a gradual recovery process. Since the impact on low-income households is acute, progress in reducing poverty achieved since the 1990s has been imperilled (IMF, 2020).

Myanmar has a relatively low COVID-19 caseload, with slight more than 13,000 cases and 300 deaths as of 30 September 2020.¹³ However, the country is expected to be disproportionately affected by the pandemic in socioeconomic terms that will far surpass the actual spread of the disease for several reasons (United Nations Myanmar, 2020): (i) increased challenges in delivering health and education, (ii) declining activity in trade and tourism, (iii) disruptions in supply chains and a resulting fall in consumption, (iv) financial market volatility and a decline in foreign investment and remittances, and (v) an increase in political tensions and insecurity due to escalating conflicts. GDP growth is projected to fall to 1–3 per cent for the 2019–2020 fiscal year followed by a rebound of 6 per cent growth in 2020–2021. Extreme poverty in Myanmar is expected to increase sharply by 23.5 per cent in 2020 (United Nations Myanmar, 2020).

Like previous shocks, the COVID-19 pandemic is not gender-neutral because women and men are concentrated in different economic sectors and jobs, and have unequal access to economic resources and opportunities (UNCTAD, 2020). The sectors most affected by the pandemic include tourism, manufacturing, transport and agriculture (United

Nations Myanmar, 2020). Tourism, agriculture, and the garment industry within manufacturing are all particularly female-intensive sectors. Other sectors of the economy are expected to be affected through spillover effects in both the formal and informal sectors.

More than 400,000 people in Myanmar work in the garment sector, and 90 per cent of them are women. The sector is experiencing severe difficulties due to the COVID-19 crisis because global demand has dropped drastically. Garment factories in the country have seen orders fall by 75 per cent as compared to 2019; they are therefore reducing their workforce or planning to temporarily or permanently close down.¹⁴ Moreover, manufacturers have had to face the additional obstacle of the unavailability of raw material – border closures and production disruption, especially in China, have jeopardized the regular flow of raw material to the country. Social distancing measures have proven difficult to enforce in crowded factories.

Women in tourism are experiencing a similar situation. The accommodation and food services sector – a major sub-sector of tourism – is a predominantly female-intensive sector across all townships (see section 5.3.1). This sector has been particularly impacted by global social distancing measures and travel restrictions. The presence of foreign visitors in Myanmar dropped by 44 per cent from January to April 2020,¹⁵ putting many direct and indirect jobs at risk. Many of the lost jobs may be held by women. Women working in other services sub-sectors, such as small trade, have also been severely affected by the health crisis because local food markets have been closed during the lockdown.

In Myanmar, as in many countries, the health pandemic has revealed the vulnerability of the agriculture sector and agri-food value chains to disruption arising from income loss, restrictions on the movement of production, workers and service providers, and the closure of markets. At the end of May 2020, 95 per cent of farmers who participated in a survey conducted by the International Food Policy Research Institute (IFPRI) in Myanmar said they had been affected to some degree by the

¹³ See Worldometer, Myanmar: Coronavirus cases (<https://www.worldometers.info/coronavirus/country/myanmar/>).

¹⁴ Hannah Abdulla (2020). Myanmar garment factory orders fall by 75%. Just-style, 3 September. (https://www.just-style.com/news/myanmar-garment-factory-orders-fall-by-75_id139507.aspx).

¹⁵ Zeyar Hein (2020). Myanmar tourism businesses prepare to reopen. Myanmar Times, 26 May, (<https://www.mmtimes.com/news/myanmar-tourism-businesses-prepare-reopen.html>).

measures taken to respond to the health crisis.¹⁶ Crop prices started declining in April due to travel restrictions and the closure of local and international markets. Farmers' financial resources have been declining, and 30 per cent of interviewed farmers reported not having enough cash to buy inputs, the prices of which have been escalating due to limited availability. As a result, farmers face difficulty in repaying loans and obtaining new ones (IFPRI, 2020). They will likely not be able to hire labour and buy inputs, therefore compromising future yields and incomes, putting food security at risk with a potential large negative impact on national poverty. The economic shock is particularly impacting poor rural households, many of which are headed by women.

In general, women-owned businesses are smaller and more likely to operate informally than businesses run by men. One of the common hurdles faced by female entrepreneurs is limited and discriminatory access to credit, which is critical for the survival of firms in times of crisis. Among the many difficulties they face to expand their businesses, women farmers in the Inle Lake area have limited access to credit (see section 4.2). This implies that, in the absence of targeted policies during and after the crisis, women entrepreneurs face a higher risk of business closures and bankruptcy than their male counterparts.

Eighty-eight per cent of employed women in Myanmar work in the informal sector (ILO, 2018a), and the country lacks a social protection system that can reach them. This means that the many women working in the informal sector are excluded from rescue measures unless such measures are expanded to cover all workers. For example, the Ministry of Labour, Immigration and Population will cover 40 per cent of the social security fees for about 1.3 million insured workers from factories and workshops that are temporarily suspended for health inspections.¹⁷ But informal workers are uninsured and hence do not qualify for such benefits.

Women hold the role of primary caregivers within households in Myanmar. Measures related to the closing of schools, pre-schools and day-care centres have resulted in an exponential increase in the time women devote to care work. In Myanmar, the lockdown up until the time of this writing has coincided with school holidays, but alternatives such as children staying with grandparents or other family members while parents work have proven impractical due to precautionary measures. This has had an immediate impact on women's ability to keep carrying out activities outside the household.

Health emergencies such as COVID-19 often exacerbate domestic violence. The situation can be particularly critical in countries that already have high levels of domestic and gender-based violence, as it is the case for Myanmar. Moreover, other forms of violence against women and girls proliferate during emergencies, for example, violence against displaced women or women belonging to ethnic minorities.

The Myanmar government launched the COVID-19 Economic Relief Plan (CERP) in late April 2020 to mitigate the negative impact of the health crisis on the economy and facilitate the recovery process. The CERP is estimated to cost US\$2 billion to US\$3 billion and consists of immediate policy and programmatic measures to create an economic stimulus, support the private and financial sectors, promote trade and investment, help vulnerable households through food aid and cash transfers, generate jobs (including for migrants), and strengthen the healthcare system (United Nations Myanmar, 2020).

The CERP introduces a short-term rescue roadmap and is connected with the country's long-term development strategy, the Myanmar Sustainable Development Plan (see section 3.2.3). It includes seven goals, 10 strategies, 36 action plans and 76 actions covering extraordinary fiscal measures and individual- and community-focused policy responses. The United Nations also developed the United

¹⁶ The survey was conducted by phone during May–June 2020 and included farmers, input retailers, output traders, millers, and mechanization service providers.

¹⁷ See the link for the IMF's coverage of COVID-19 policy responses: <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19#M>.

Nations Socio-Economic Response Framework to COVID-19 in Myanmar, which aligns with the CERP.¹⁸

For the agriculture sector, the CERP includes cash or lending support to smallholder farmers who have lost income to enable them to buy inputs in time for planting, as well as advisory services on productivity enhancement and market connectivity. Moreover, the CERP allows banks to restructure and reschedule existing loans accorded to micro, small and medium-sized enterprises (MSMEs).

The plan extends healthcare benefits for a period of six months to one year to workers who have lost their job and includes cash and in-kind food transfers to vulnerable households. The government envisages implementation of labour-intensive community infrastructure projects for those laid off and for returning migrants.

A COVID-19 fund has been set up to provide soft loans at reduced interest rates to MSMEs in sectors particularly affected by the health crisis, including the garment industry and the hotel and tourism sector. The stimulus package also features monetary policy responses, including eased deadlines for tax payments and tax exemptions for eligible locally owned businesses. The plan promotes the use of mobile financial payments, including facilitating e-commerce.

Finally, in consideration of the importance of tourism for the country's economic development prospects, a COVID-19 Myanmar Tourism Relief Plan was issued in May 2020 based on the CERP. The plan includes tax relaxation, as well as waivers of license fees and lease fees for hotel and other tourism outlets from 1 April 2020 to 31 March 2021. It foresees the development of new tourism plans, strategies and destinations, the promotion of domestic tourism, and the launching of communications and marketing campaigns. In order to ease the impact of the health crisis on tourism professionals and staff, it provides for free online refresher courses on digital marketing and leadership in the sector accompanied by the payment of daily wages, as well as support to tourism training schools. Finally, it provides incentives and tax holidays for investments in the tourism sector. On 17 June 2020, the Ministry of Hotel and Tourism issued National Tourism Guidelines for COVID-19 Safe Services that are meant to ensure the safety of both tourism employees and visitors.

While none of the measures in CERP directly target women, support to rural households and to female-intensive sectors, such as the tourism and garment sectors, are expected to benefit them.

¹⁸ The United Nations Socio-Economic Response Framework is based on five pillars (United Nations Myanmar, 2020): (i) help protect the health system, (ii) protect people through social protection and basic services, (iii) preserve jobs, small and medium-sized enterprises, and vulnerable workers in the informal sector through economic recovery, (iv) promote fiscal and financial stimulus measures to make the macroeconomic framework work for sustainable development, and (v) build social cohesion and trust through social dialogue and political engagement and promote community-led resilience.



3. The legal and institutional frameworks to foster gender equality and women's empowerment



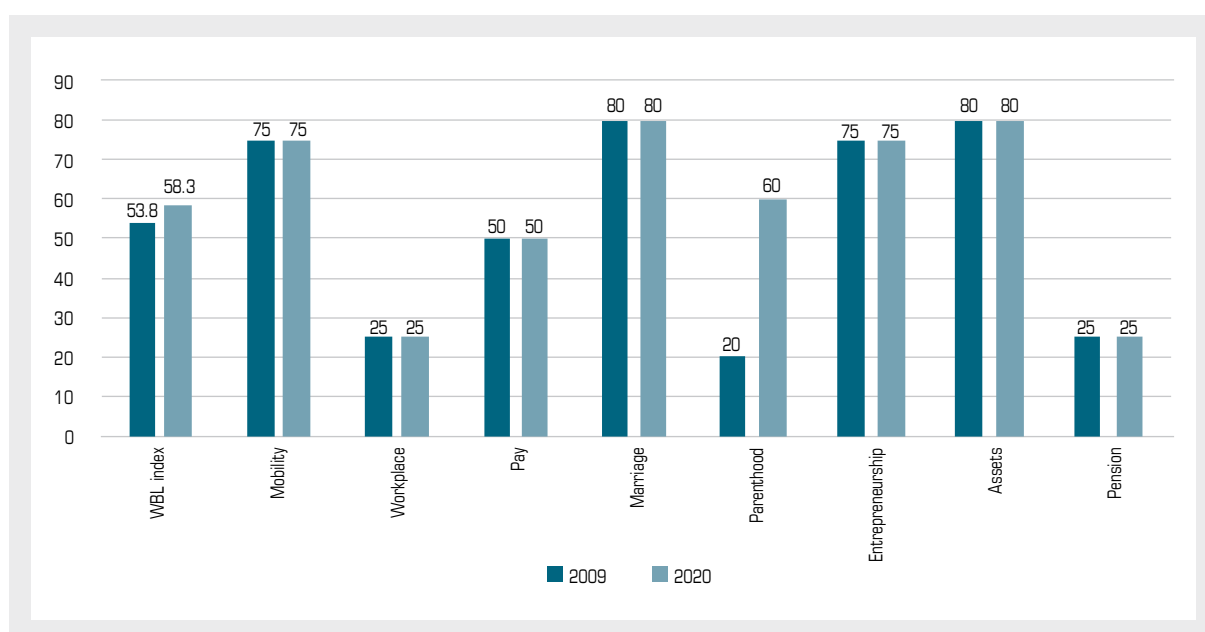
3. THE LEGAL AND INSTITUTIONAL FRAMEWORKS TO FOSTER GENDER EQUALITY AND WOMEN'S EMPOWERMENT

3.1. DIMENSIONS OF GENDER EQUALITY IN MYANMAR: AN OVERVIEW

This section provides a snapshot of legal frameworks in some key areas that have an impact on women's empowerment and economic participation. Before looking into specific areas in detail, figure 2 presents a summary of Myanmar's scores on different dimensions of gender equality in 2009 and 2020 based on the World Bank's (2020) Women, Business and the Law (WBL) index. Myanmar scored 58.8 out of 100 on the WBL summary index in 2020, showing only a slight improvement since 2009 that resulted from some advancements in the legal setting regarding women's work after having children.

According to the law, in terms of gender equality in assets, there are equal ownership rights for married men and women, though there is no indication as to how women can defend their rights following divorce or the death of a husband, or regarding equal inheritance rights of sons and daughters, or equal administrative authority over assets during marriage. In terms of entrepreneurship, women are able to legally sign a contract, register a business, and open a bank account in the same way as a man. However, discrimination by creditors on the basis of sex or gender is still not prohibited. With respect to mobility, women can legally travel outside the country and their home, and legally choose where to live in the same way as a man. In the area of marriage, a woman is not legally required to obey her husband, can be the head of household or head of family in the same way as a man, can obtain a judgment of divorce in the same way as a man, and has the same rights to remarry as men (World Bank, 2020). However, customary law provides a different and far less equal legal setting in relation to succession, inheritance and marriage. Often, it does not provide women with equal access to or control over land; allows men to have greater economic and decision-making power within the household; and provides sons with broader inheritance rights than daughters (ADB, 2018).

Figure 2. Scores on different dimensions of gender equality in Myanmar (maximum score = 100)



Source: Panel data from the Women, Business and the Law index (World Bank, 2020).

3.2. COUNTRY-SPECIFIC LEGISLATION

The legal framework in Myanmar provides opportunities for women's empowerment and to foster their participation in the economy. Positive developments toward this end include the National Strategic Plan for the Advancement of Women, the Action Plan for Women's Entrepreneurship, and the Strategic Plan on Reproductive Health. There are also laws enacted toward gender equality in the labour market, including the 2013 Minimum Wage Law, which provides that both women and men are entitled, without discrimination, to be paid the legal minimum wage, and the 2013 Employment and Skill Development Law, which provides for the creation of internal job opportunities and the enhancement of worker skills, without discrimination on the basis of sex. However, in Myanmar as in many other countries, there seems to be a disconnect between gender equality goals, on the one hand, and political willingness, resources and mechanisms available for making such goals a reality, on the other.

Myanmar's Constitution (Article 348) states that the union shall not discriminate based on race, birth, religion, official position, status, culture, sex or wealth. Nevertheless, the Constitution refers to women mainly as mothers, undermining the other functions women carry out and reinforcing gender stereotypes about women's and men's roles in the family and in society (CEDAW, 2016a).

The United Nations Committee on the Elimination of Discrimination against Women (CEDAW), in its concluding observations on the combined fourth and fifth periodic reports on Myanmar, observed that the country had not fully implemented the Convention on the Elimination of all Discriminations against Women and that the provisions of the convention were neither sufficiently known in the country nor integrated in national legislation.¹⁹ It urged Myanmar to adopt a comprehensive definition of discrimination against women in national legislation to ensure that women are protected against both direct and indirect discrimination in all spheres of life (CEDAW, 2016a).

The fact that many institutions are involved in the implementation of several pieces of new legislation does not provide clarity on rights and obligations. Some important laws, such as the one on violence against women, have been under discussion for years but approval is still pending. As mentioned above, customary principles and norms may impinge on the gender equality principles enshrined in statutory laws.

3.2.1 THE 2013–2022 NATIONAL STRATEGIC PLAN FOR THE ADVANCEMENT OF WOMEN

In 2013, the 2013–2022 National Strategic Plan for the Advancement of Women (NSPAW) was launched under the guidance of the Myanmar National Committee on Women (MNCW). The plan was built around the 12 priority areas of the 1995 Beijing Platform for Action adopted at the United Nations' Fourth World Conference on Women.²⁰ The overall goal of the NSPAW is that "All women in Myanmar are empowered and able to fully enjoy their rights with the support of the Government of the Republic of the Union of Myanmar. Enabling systems, structures and practices are created for the advancement of women, gender equality, and the realization of women's rights."²¹

The expectation of MNCW is that the entire government will collaborate on implementation of the plan, along with national and international NGOs, United Nations agencies, civil society and private agencies. For each priority area, the plan identifies research and survey needs, lists initiatives meant to raise awareness, and describes implementation plans, budget needs and policymaking expectations.

In the area of women and the economy, the overall goal is to ensure fairness and equal rights for women in relation to employment, credit, resources, assets and social benefits. The plan calls for carrying out research and surveys to measure women's participation in the economy and determine the hurdles they face in economic life and in terms of wage discrimination and other gender-based discrimination in the workplace.

¹⁹ Myanmar ratified the Convention on the Elimination of all Discriminations against Women on 22 July 1997.

²⁰ The 12 priority areas are livelihoods, education, health, violence against women, economics, implementation mechanisms, human rights, media, environment, girls, decision-making, women and armed conflicts.

²¹ Page 5. The 2013–2022 National Strategic Plan for the Advancement of Women is available at: https://myanmar.unfpa.org/sites/default/files/pub-pdf/NSPAW2013-2022_0.pdf

In addition, the plan calls for undertaking awareness-raising initiatives that focus on sharing knowledge on labour rights and gender equality commitments, and on fighting gender-based prejudice and stereotypes that impede women's participation in the economy; putting in place policies in accordance with the Beijing Platform for Action to provide women with equal employment, include them in decision-making, facilitate their access to economic resources, and ensure rights and security in the workplace; reviewing and monitoring existing policies from a gender perspective; and devoting the human and financial resources necessary to implement the above-mentioned initiatives.

To date, however, little has been done to translate the ambitious goals of the plan into practical action (Minoletti, 2016). Despite having identified the 12 priority areas for intervention, the plan remains generic, lacks details, and fails to articulate practical steps, milestones, deadlines and actual avenues to reach its goals. Moreover, the plan is not accompanied by adequate human and financial resources and does not contain mechanisms to monitor its implementation. The United Nations Committee on the Elimination of Discrimination against Women has expressed doubt about the ability of the MNCW to effectively carry out its activities, including those related to gender mainstreaming and gender-responsive budgeting (CEDAW, 2016a). The NSPAW Management Committee is the institution in charge of implementing the plan at the union, state, regional and township levels under the guidance of MNCW. But the MNCW is reported to have little institutional stature and negotiating power, a limited budget, and limited human resources capacity to implement the NSPAW (Gender Equality Network and Global Justice Center, 2016).

Nevertheless, some positive developments have taken place. The MNCW was reformed in late 2016 and tasked with providing recommendations to an inter-ministerial committee and supporting implementation of the NSPAW. Four Technical Working Groups were established to ensure implementation of the plan: (i) Women, Peace and Security; (ii) Violence against Women and Girls; (iii) Women and Participation; and (iv) Gender Mainstreaming. United Nations agencies, local and international NGOs and civil society organizations are participating in the Technical Working Groups in order to facilitate NSPAW implementation.

3.2.2. THE ACTION PLAN FOR WOMEN'S ENTREPRENEURSHIP

This plan recognizes the importance of women's entrepreneurship for the economic growth of the country and the need to provide special support to women entrepreneurs. The ministries involved in the plan are those of industry, which plays the leading role, commerce and agriculture. The involvement of additional ministries seems necessary for the plan to be effective, since coordinated intergovernmental efforts and leadership are currently lacking. Moreover, for the plan to successfully address the specific problems women entrepreneurs face and provide adequate responses, it should be based on a gender assessment that would provide the basis for concrete measures and strategies (ILO and Sasakawa Peace Foundation, 2020).

3.2.3. THE 2018–2030 MYANMAR SUSTAINABLE DEVELOPMENT PLAN

This plan provides the overall vision to make Myanmar a peaceful, prosperous and democratic country, and presents pathways to address development challenges and maximize opportunities for all. It is structured around three pillars (i.e. peace and stability, prosperity and partnership, and people and the planet), five goals, 28 strategies and 251 action plans aligned with the United Nations Sustainable Development Goals. The plan recognizes the need to create an enabling environment for women and youth to help them contribute to national prosperity. Issues pertaining to youth, gender empowerment, equity and inclusion are therefore considered cross-cutting and are expected to be mainstreamed in all aspects of the plan.

Under Goal 1 (Peace, National Reconciliation, Security & Good Governance), the plan's commitments include promoting and prioritizing inclusive growth and job creation in post-conflict and conflict-affected areas and balancing economic development across states and regions. The plan calls for placing equity, inclusivity and gender empowerment at the centre of development strategies and policies at all levels and in all sectors. Under Goal 3 (Job Creation & Private Sector Led Growth), the plan aims, among other objectives, to create a strong microfinance industry to serve MSMEs in urban and rural areas, taking into account the specific barriers faced by women and ethnic groups; empower rural communities; develop agricultural development

plans; promote education and training in agriculture; strengthen rural households' land tenure and property rights; enhance market intelligence, market linkages and competitiveness; and revise trade policy in line with regional and global commitments, simplifying trade and customs procedures and rationalizing tariffs. Under Goal 4 (Human Resources & Social Development for a 21st Century Society), the plan includes expansion of universal cash allowance to pregnant women and children as well as the elderly, school feeding programmes, public employment opportunities, education and vocational training for poor populations, and enforcement of the minimum wage, together with monitoring mechanisms to track application and impact.²²

The plan is ambitious and comprehensive, so several years will likely be needed for its implementation. While its overarching goal is peace, it clearly links the achievement of peace with economic development, political participation and modernization of the public sector. It is commendable that gender equality is regarded as a cross-cutting issue to be mainstreamed throughout implementation of the plan. Beyond gender mainstreaming and the recognition of women's contribution to the country's prosperity, many provisions of the plan have the potential to benefit women, and especially women farmers, by strengthening land tenure, providing more education and training, linking women's production to the markets, providing market information, and making available the needed financial support to women-led enterprises. As for other progressive laws and policies recently enacted in the country, the main issue will be the political willingness to implement the plan through projects and programmes, the availability of necessary human and financial resources for this to happen, and the capacity to monitor progress.

3.2.4. LAND TENURE

In a country where more than half of the population is employed in agriculture, access to land is a key concern. The 2008 Constitution stipulates that land is owned by the state, but citizens have been given rights to use it. The Ministry of Agriculture, Livestock and Irrigation (2018) lists one of the main weaknesses of the agricultural system as "limited access of female and male smallholder farmers to secure land rights, aggravated by an underfunded and inefficient land

registration, classification and titling processes." Customary tenure, informal settlements, landlessness, land grabbing, use of public lands, water access and forest rights are the main challenges with respect to land tenure.

The legal and institutional framework on land tenure and land rights remains highly fragmented, with 10 different government departments involved in land administration. The 2012 Farmland Law establishes landholder rights to inherit and transfer the use and occupancy of land through land use certificates (known as Form 7). The certificates are issued to the head of the household, usually a man. The 2012 Vacant, Fallow, and Virgin Land Law legalises land concessions of "unused" land, which are often grants given to large investors or companies. Indeed, large-scale land acquisitions have led to conflicts with local communities that use the land for non-traditional farming purposes.

The 2016 National Land Use Policy recognizes that men and women have equal rights to land held by the household. It includes several important objectives related to sustainable use of land, protection of cultural heritage areas, recognition of customary land rights, and establishment of an efficient system to solve land disputes. However, several legal and administrative acts are needed to operationalize the law.

The language included in the various pieces of land legislation and policy is "gender-neutral," meaning that by and large it recognizes the equal rights of persons of any gender regarding land tenure, land use and management and participation in decision-making. However, it does not address the many difficulties women in particular face in realizing their rights. Because of gender biases and stereotypes regarding land use and the complexity and costs related to registering and transferring land titles, women seldom are recognized as household heads or as landowners. As a result, women are seen as playing a secondary role in farming and therefore enjoy limited participation in land-related decision-making processes at the village level, which further jeopardizes practical application of their rights (Louis et al., 2018).

In Shan State, the root causes of land-related conflicts include the land ownership registration process,

²² Goal 2 refers to "Economic Stability & Strengthened Macroeconomic Management", while Goal 5 addresses "Natural Resources & the Environment for Prosperity of the Nation".

outdated cadastral maps, lack of a centralized database on customary land ownership, and the land use system. Local people, especially minority ethnic groups, have been living and working on the land for generations without having any official documents proving ownership, and many practice shifting cultivation.²³ The need to have a legal title and the complexity of obtaining it have taken many people by surprise and have resulted in numerous claims of land grabbing by several actors, including the Myanmar army, the Forest Department, private companies, and organizations related to the government (Human Rights Watch, 2018). The Agriculture Development Strategy recognizes that land grabbing is a serious problem that aggravates inequality and provokes social and economic unrest, which in turn jeopardizes the productivity of the sector (Ministry of Agriculture, Livestock and Irrigation, 2018).

According to UNCTAD's 2019 farmer survey, formal land titling through Form 7 is extremely rare in the upland plots of Shan State where tea, coffee, oranges, lemons and ginger are grown. The 2012 Farmland Law recognizes customary land tenure but does not define the boundary of customary land-tenured areas. Moreover, it does not seem to cover the rights of ethnic groups in the hills whose livelihoods mainly rely on shifting cultivation. Since customary land tenure areas are not always delineated and mapped, they may be marked by the government as virgin/fallow/vacant land areas and granted to those applying for land use/land tenure certificates for these lands. As a result, many local farmers believe that community land has been arbitrarily considered "unused" and unfairly allocated to investors and large firms.

Recognizing the huge problems and tensions related to disputes over land, in June 2016, the newly elected government created the Central Reinvestigation Committee for Confiscated Farmlands and Other Lands. However, given the extremely complex and very high number of claims, many cases remain unsolved (Human Rights Watch, 2018).

In the Inle Lake area, customary land utilization and land governance are rather well structured. By and large, farmers are familiar with customary land tenure

regulations, and the boundaries of privately owned land areas, community-owned areas and village areas are quite clear. Therefore, land use issues, conflicts and disputes are not very frequent.

3.2.5. LABOUR LEGISLATION

Myanmar has not yet ratified the ILO core Convention on Equal Remuneration (Convention No. 100, 1951), which provides for equal pay for work of equal value for both men and women. Neither has the country ratified the core Convention on Employment and Occupation Discrimination (Convention No. 111, 1958), which provides for non-discrimination in the field of employment and occupation, or the Domestic Workers Convention (Convention No. 189, 2011), which extends basic labour rights to domestic workers (MCRB, 2017). In June 2019, the ILO adopted the Violence and Harassment Convention (Convention No. 190, 2019) to prevent, remedy and eliminate violence and harassment in the world of work, including gender-based violence and harassment. Myanmar could consider ratifying it. The ILO is supporting Myanmar to revise its labour law, and this could prove beneficial to gender equality in the world of work.

Article 349 of Myanmar's Constitution provides that all citizens "shall enjoy equal opportunity" in public employment, occupation, trade, business, technical know-how and invention, and exploration of art, science and technology. Yet, Article 352 of the Constitution states that although there may be no discrimination on the basis of sex "in appointing or assigning duties to civil service personnel...nothing in this section shall prevent appointment of men to the positions that are suitable for men only" (MCRB, 2017). This leaves room for maintaining existing discrimination and gender inequality in access to leadership or decision-making positions.

The Ministry of Labour, Employment and Social Security has identified 17 pieces of outdated and discriminatory labour legislation for reform. These include including gender equality and women's rights provisions into labour legislation, particularly in areas where women's employment is currently prohibited or severely limited, and into social security law (CEDAW,

²³ According to the Food and Agriculture Organization, the characteristics of shifting cultivation are (i) the removal of natural vegetation (usually forest or shrub land), in most cases by cutting and subsequent burning; (ii) alternating between a short duration of cultivation and a comparatively long duration of bush or forest fallow; and (iii) the regular, in most cases cyclical, shifting of fields in a more or less fixed area of land (Erni, 2015).

2016b). It does not seem that any reform has taken place since the CEDAW report was issued in 2016.

As for wages, as mentioned above, the government enacted the Minimum Wage Law in 2013. However, under the law the minimum wage was to be applied to all workers except those working in small and family-run businesses that employ fewer than 15 people (CEDAW, 2016b). Hence, the minimum wage law does not cover most farmers and small tourist businesses that are critical for the selected value chains in this study. Similarly, Article 350 of Myanmar's Constitution guarantees that women have the enforceable right to the "same rights and salaries" as what is received by men "in respect of similar work." It has been argued, however, that the use of "similar work" will not achieve the same outcome in terms of equality as the principle of "equal pay for equal work of equal value" (MCRB, 2017). As discussed in section 3.3.1, despite the above commitments, important wage disparities exist in Myanmar between men and women that hold the same job position.

3.2.6. ACCESS TO CREDIT

There is no evidence of laws that directly discriminate against women in access to financial services. However, for married women, spousal consent is required to obtain bank loans. This is likely to affect women more than men, as cultural norms and practices position men as the main household decision-makers. Furthermore, only one name, often the man's name, is included in the land ownership documents that are required as collateral to obtain credit (Dalberg Global Development Advisors, 2018). As stated earlier, there is no law that prohibits discrimination by creditors on the basis of sex or gender according to World Bank (2020).

3.2.7. ACCESS TO EDUCATION

The 2014 National Education Law (NEL) and the 2015 NEL Amendment provide a thorough legislative

framework for the entire education sector, recognizing, among other things, the right of all citizens to free and compulsory primary education (CEDAW, 2016b). The Ministry of Education has developed and is implementing the 2016–2021 National Education Strategic Plan with the aim of strengthening the system to ensure access to formal and non-formal quality education for women and girls.

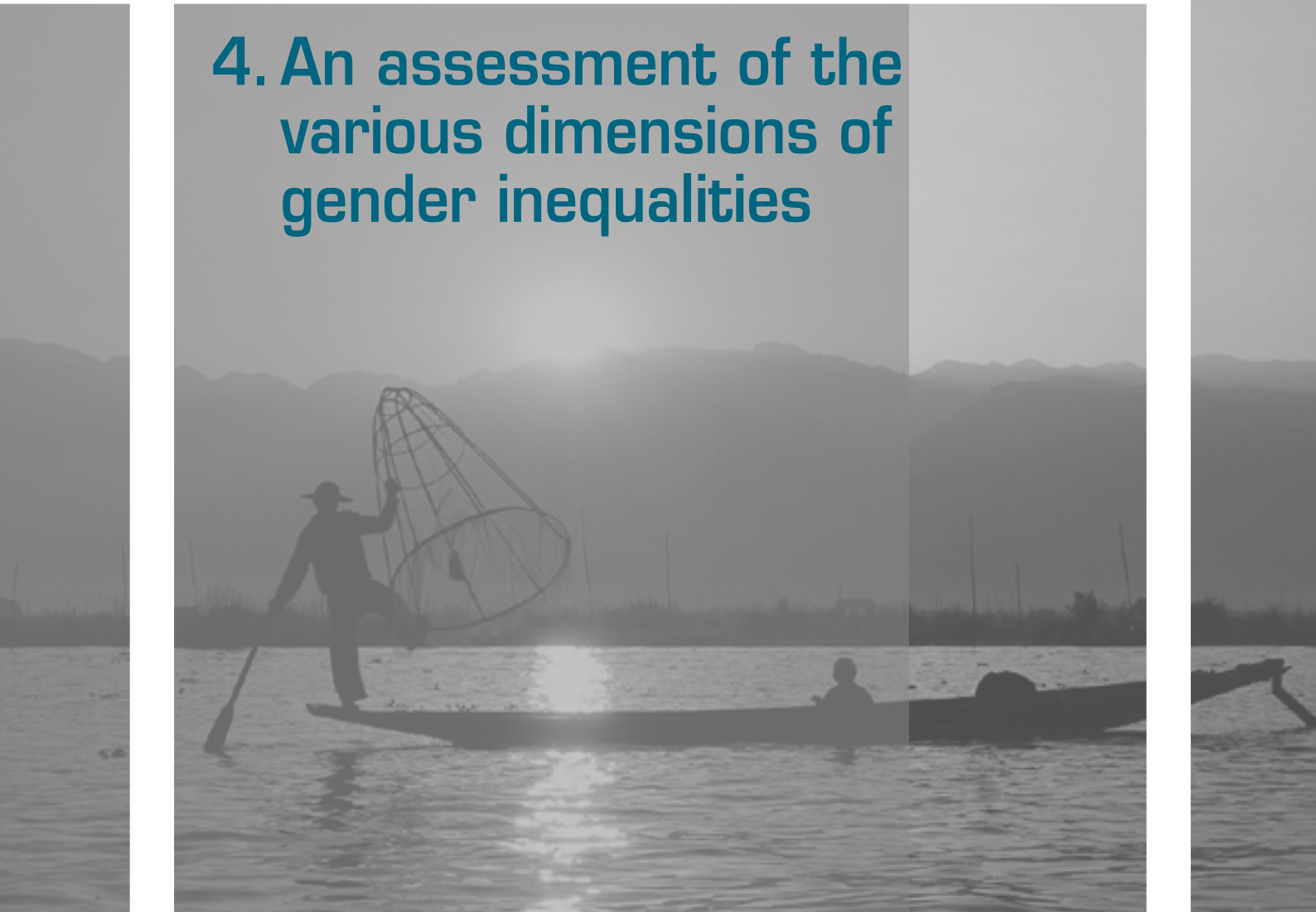
No information is available about how the plan is being implemented. However, survey findings in 2018 in Southern Shan suggest that little has been done in the areas just mentioned (CSO et al., 2018; MIID, 2018; World Bank, 2019). Moreover, as mentioned in section 3.4.1., important gender gaps in education remain in Shan State and in the townships covered by this report.

3.2.8. PROTECTING WOMEN AGAINST VIOLENCE

Violence prevents women from playing a dignified role in society and in the economy. With the aim of complying with Myanmar's international commitments, the government drafted the Prevention and Protection of Violence against Women Bill under the guidance of the MNCW. The bill has been in development since 2013 and was before Parliament for consideration as of February 2020. It provides a legal framework to protect women from all forms of violence—including intimate partner violence, marital rape, sexual violence, harassment by stalking, and violence through tradition and customary practice (CEDAW, 2016b; MCRB, 2017). However, it is not clear to what extent the bill will address the deficiencies in domestic law in Myanmar such as those related to sexual violence (Human Rights Council, 2019) and to sexual harassment in employment. Moreover, reporting being a victim of sexual or gender violence is surrounded by stigma. Together with language issues, remoteness and fear of reprisal, this discourages women, especially those from minority groups, from gaining effective access to justice.



4. An assessment of the various dimensions of gender inequalities



4. AN ASSESSMENT OF THE VARIOUS DIMENSIONS OF GENDER INEQUALITIES

In recent years the government of Myanmar has enacted legislation and implemented numerous programmes to mainstream gender equality in the development of the country. There have been several improvements in economic and social status indicators for Myanmar women. Indicators have improved for women's labour force participation, non-agricultural wages, access to credit, literacy, primary and secondary education gender gaps, and maternal mortality (World Bank, 2018a). Yet the country has a long way to go to reach gender equality. Myanmar was ranked 145th out of 189 countries on the United Nations Development Programme's 2019 Gender Inequality Index. Other ASEAN countries scored remarkably better than Myanmar: for example, Singapore ranked 9th, Brunei 43rd and Malaysia 61st. while only Cambodia ranked below Myanmar. The Organisation for Economic Co-operation and Development's 2019 Social Institutions and Gender Index ranked Myanmar 94th out of 120 countries and 7th of 8 countries in Southeast Asia. The World Economic Forum's 2020 Global Gender Gap Report ranked Myanmar 114th out of 153 countries, the lowest ranking among ASEAN member countries. Myanmar scored 0.47 on the World Bank's Human Capital Index, implying that a girl born today will only be half as productive as she could have been if she had enjoyed full education and health (World Bank, 2019). Low public spending on health and education has contributed to sub-optimal improvements of gender indicators in these areas (World Bank, 2019).

4.1. GENDER NORMS AND CUSTOMARY LAW

In the Inle Lake area and in Myanmar more generally, gender norms and customs shape how society is organized and the division of labour. According to social norms, women and girls are expected to preserve Myanmar's culture and traditions and comply with gender roles, especially since the country achieved independence. This means that women's and girls' behaviour tends to be closely scrutinized and condemned when it does not conform to traditional norms. Women's decency, modesty and chastity are

considered key values, and women's worthiness is often assessed against them. Religion also plays a role in assigning a status to men that is superior to women. Social norms upholding patriarchal attitudes determine what is appropriate for girls and boys and have an impact on girls' self-confidence, assertiveness and sense of worth. By and large, people who break with social norms risk being sanctioned by society (Tun Thein, 2015).

This situation is slowly changing, however, and women's space and mobility are broadening as a result of their increasing participation in productive activities outside the household. Such changes are more visible in towns, while rural areas lag behind (Tun Thein, 2015).

The United Nations Committee on the Elimination of Discrimination against Women, in taking notice of the persistence of patriarchal attitudes and discriminatory stereotypes, recommended that Myanmar put in place a comprehensive strategy aimed at eliminating discriminatory stereotypes and changing social norms that reinforce traditional roles assigned to women and men in the family and society (CEDAW, 2016a).

In agriculture, women are not regarded as farmers by their families or by the government, since the role of "farmer" is predominately reserved for men, despite women's significant contributions to the sector. An illustration of this is that the Ministry of Agriculture's Department of Agricultural Mechanization has justified the allocation of yearly plots exclusively to men "because men are the ones doing most of the farming" (MEDA, 2015). This perception of women's role in agriculture is also reflected in gender inequality in property and land ownership. Moreover, women themselves overlook their role as farmers (SDC, 2018). Female-headed households face various forms of gender inequality that impact their productivity and wellbeing (see box 2).

Gender division of labour and segregation are very prevalent in the labour market in Myanmar. Men are assigned the role of main breadwinners and dominate skilled occupations and sectors in the economy. Women are highly segregated into traditional, low-skilled professions and tasks associated with female labour and experience a gender wage gap. Deviating from these roles and crossing gender boundaries at work may easily put women in an uncomfortable position and trigger negative perceptions (Tun Thein,

Box 2. Female-headed households

Discriminatory cultural norms regarding the role of women in education and the labour force are particularly pervasive for women who are heads of households. At the country level, around 82 per cent households are male-headed versus 18.5 per cent female-headed. While almost all male heads of household are married (93 per cent), only 7 per cent of female heads of household are. Female-headed households are then predominantly headed by widows or women who are divorced or separated, implying a high level of poverty.

Source: FINMARK Trust et al. (2019)

2015). Indeed, women who manage to enter non-traditional professions, for example in the information and communications technology (ICT) sector, are often considered outliers and may be perceived negatively or be discriminated against (Gender Equality Network, 2015).

Existing social, cultural and religious norms assign women the role of main provider of unpaid work (e.g. childcare, care for the elderly and sick members of the household, cleaning, food preparation, collecting firewood, fetching water, etc.).²⁴ This traditional gender division of labour constrains women's participation in paid work and their mobility to search for jobs or get training. Local customs also limit women's mobility at night unless it is related to tasks assigned to women, for example, the preparation of religious ceremonies (UNDP, 2012). These limitations may have repercussions on productive activities as well. For example, women cannot undertake agricultural tasks that are better performed at night, like irrigation.

Gender segregation is also evident in leadership roles. Leadership styles that are largely considered to be feminine (e.g. thoughtfulness, patience, consultation and inclusiveness) are often seen as inefficient and time-consuming (Oxfam et al., 2013). In a survey conducted by the Centre for Diversity and National Harmony in Shan State in January-May 2018,²⁵ only 20 per cent of respondents believed that male community leaders would accept women as community leaders; 54 per cent indicated that this would happen only to some extent; and 9 per cent did

not believe it would happen at all (SDC, 2018). These perceptions are reflected in traditional proverbs and everyday sayings that portray women as inefficient and secondary to men. This attitude is so entrenched in local culture that most women do not believe that they are being discriminated against. Indeed, according to the survey, 62 per cent of women believe that men and women are treated equally (SDC, 2018).

4.2. CONSTRAINTS ON WOMEN'S BUSINESS DEVELOPMENT

Gender inequalities in different domains of economic life create disadvantages for women's business development prospects. For example, women's lower education levels and limited access to finance may undermine their capacity to formalize and develop their businesses. These inequalities become even more pressing issues in the context of the complex bureaucracy in Myanmar (Totten et al., 2019).

The business environment in the Inle Lake area does not allow women to operate equally with men as entrepreneurs or employees in all segments of value chains. As discussed in detail in section 3.2.4, land titling remains a thorny issue in Myanmar, and in the Inle Lake area a sizable portion of the population does not have land titling. The uncertainty about land ownership results in poor investment in agriculture in Myanmar (SDC, 2018). The situation is worse for women, as women's names rarely appear on land tenure and use contracts, despite their active contribution to

²⁴ According to ILO data, without exception across the world women perform the majority of unpaid care work (i.e. 76.2 per cent). In Asia and the Pacific, women spend 4.1 times more time in unpaid care work than men (ILO, 2018b).

²⁵ The survey was commissioned by the Embassy of Switzerland in Myanmar and covered 24 townships in Shan State. The qualitative research was carried out through interviews, focus group discussions and meetings with stakeholders that involved 282 respondents. The quantitative element involved 3,010 participants through a public opinion questionnaire. Respondents were selected taking into account ethnicity, geography, gender, age, religion and income diversity.

every node of agricultural value chains and their role as main economic actors in value addition in the ginger and avocado sub-sectors. Lack of access to land also negatively affects women farmers' access to credit, technology, inputs and equipment, education, training, and extension services because land ownership is linked to accessing these services. Women do not participate in consultations and decision-making processes regarding land or in dispute settlement mechanisms (MCRB, 2017). Similarly, men dominate ownership of property and businesses, including input supply, processing and retail enterprises.

Gender biases are also present when negotiating contracts with suppliers or clients, although UNCTAD's farmer survey shows mixed results. More than half of married women reported that they negotiate the quantity and price of inputs by themselves, around 20 per cent do so jointly with their husbands, while around 30 per cent said that they leave this task to their husbands. The picture changes completely when machinery and more sophisticated equipment are at stake. In this case, the survey shows that men negotiate the purchase.

Sections 4.3, 4.4 and 4.5 below present an overview of gender profiles in the Inle Lake area in three domains key to gender equality: access to resources and opportunities (i.e. labour market participation, time use, decision-making power), human capital (education and training), and security.

4.3. THE ACCESS TO RESOURCES AND OPPORTUNITIES DOMAIN

4.3.1. LABOUR MARKET OUTCOMES

Labour force participation and unemployment rates

Shan State had the highest labour force participation rate among regions and states in Myanmar in 2017 (CSO et al., 2020). As is typical in most developing countries, men had a higher labour force participation rate than women. The labour force participation rate was 74 per cent for men and 52 per cent for women at the union level and 80 per cent and 63 per cent, respectively, in Shan State (CSO et al., 2018). Across the townships covered in this report, there were significant differences in terms of the labour force participation rate by sex (table 1). Women had a higher labour force participation rate than the economy-wide average, while the men's rate was below the union average in 2014, except for Taunggyi.

In 2017, the unemployment rate was 2.2 per cent for women and 2.1 per cent for men at the union level, rather low partly due to lack of unemployment benefits and the resulting need to meet basic subsistence requirements (CSO et al., 2020). In line with the national trend, the unemployment rate was also very low across all townships. This also reflects the role of unpaid family work that is an important form of employment, especially for women, in most of the townships where this research was undertaken.

Table 1. Labour force participation and unemployment rates by sex and township (per cent)

		Taunggyi	Hopong	Kalaw	Nyaung Shwe	Pekon	Pindaya	Pinlaung	Ywangan
Labour force participation rate	Male	70.9	79.8	79.1	78.1	75.9	76.1	78.5	76.4
	Female	49.4	67.1	62.1	61.4	65.9	68.4	70.6	60.5
	GPI	0.70	0.84	0.79	0.79	0.87	0.90	0.90	0.79
Unemployment rate	Male	2.16	0.59	1.27	0.90	0.99	0.77	0.84	0.89
	Female	1.21	0.40	1.05	0.78	1.01	0.84	0.95	1.05
	GPI	0.56	0.69	0.83	0.87	1.02	1.09	1.13	1.18

Source: UNCTAD calculations based on the 2014 Myanmar Census.

Note: GPI: gender parity index. In this table, the GPI indicates the ratio of female to male values of labour force participation and unemployment rates. A GPI equal to 1 indicates parity between females and males.

Employment distributed across different economic sectors

This section examines the employment structure by economic activity and occupation at the township level in the Inle Lake area. Agriculture accounts for more than 80 per cent of employment for both men and women in Hopong, Pekon, Pindaya, Pinlaung and Ywangan (figure 3). This is much higher than the national average, which saw 56 per cent of the population employed in agriculture according to 2018 data. Indeed, Shan State has the second-highest share of households engaged in agricultural activities (81 per cent) in Myanmar (CSO et al., 2020).

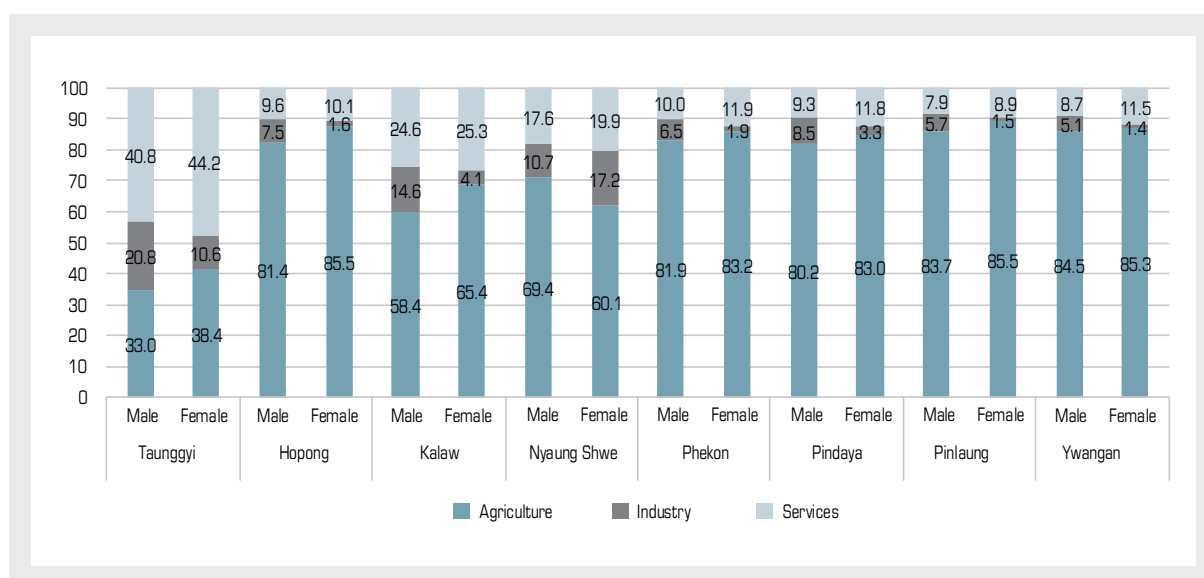
Taunggyi is the only township where services provide the major source of employment for both men and women (41 and 44 per cent, respectively). At the national level, 37 per cent of women and 28 per cent of men are employed in services (CSO et al., 2020).

The industrial sector plays a very small role in employment generation in most townships covered by this report, much lower than the national average (13 per cent of women and 19.7 per cent of men; CSO et al., 2020). Taunggyi, Kalaw and Nyaung Shwe are the main exceptions, with shares of industrial employment above 10 per cent (table 2).

Construction holds a significant share of employment especially for men. Nyaung Shwe and Taunggyi are the two townships with the highest share of women in the manufacturing sector, at 16.6 per cent and 8.4 per cent, respectively. Manufacturing corresponds to 11.3 per cent of total female employment at the union level. Overall, men are more likely to be employed in the industrial sector and women in services in Myanmar, reflecting the influence of occupational gender segregation (CSO, et al. 2020).

Given the importance of the services sector in employment, especially in Taunggyi, Kalaw and Nyaung Shwe, the next section examines the distribution of employment among services sub-sectors. Wholesale and retail trade is the most important sector within services for both men's and women's employment across the townships. The accommodation and food services sector corresponds to 9 per cent of women's employment in Taunggyi and 5-6 per cent in Kalaw and Nyaung Shwe; its share is much smaller in other townships for both men and women. Transport, storage and communication is a relatively significant sector of employment for men, reflecting the gender division of labour within services. Education is more of a women's services sub-sector in terms of employment, as is the case generally around the world.

Figure 3. Employment composition by broad sectors (per cent shares)



Source: UNCTAD calculations based on the 2014 Myanmar Census.

Table 2. Share of employment in the manufacturing and services subsectors by gender (per cent)

	Taunggyi		Hopong		Kalaw		Nyaung Shwe		Pekon		Pindaya		Pinlaung		Ywangan	
	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Manufacturing	5.4	8.4	1.2	0.8	2.1	2.2	4.1	16.6	1.5	1.3	1.9	3.1	1.3	1.1	1.1	1.2
Construction	14.2	1.9	6.1	0.7	7.9	0.8	6.4	0.5	4.6	0.6	6.4	0.1	3.9	0.3	3.8	0.1
Wholesale and retail trade, and repair	13.0	16.3	2.3	3.1	6.8	10.6	5.0	7.3	2.4	4.8	2.6	4.3	2.2	3.7	2.1	4.7
Transport, storage and communications	9.5	0.6	2.1	0.1	5.6	0.6	5.5	0.3	2.0	0.1	2.1	0.0	1.8	0.1	2.6	0.1
Accommodation and food services	4.8	9.0	1.2	2.9	3.0	5.9	3.0	5.0	0.7	1.6	1.3	2.5	0.7	1.4	0.7	1.7
Financial intermediation, real estate and business activities	2.2	2.4	0.2	0.1	1.3	1.0	0.4	0.4	0.1	0.1	0.3	0.2	0.2	0.2	0.2	0.2
Public administration including civil servants	5.2	3.2	2.1	0.6	4.7	1.4	0.9	0.9	3.1	0.8	1.3	0.9	1.6	0.6	1.1	0.8
Education	0.5	5.3	0.2	1.6	0.2	2.8	0.4	3.6	0.5	2.9	0.7	2.7	0.3	1.8	0.5	2.7
Health and social work	0.5	1.4	0.2	0.3	0.2	0.4	0.2	0.4	0.2	0.6	0.2	0.3	0.1	0.3	0.1	0.4
Other community, social and personal service activities	4.6	4.5	1.2	1.2	2.5	2.1	2.0	1.6	0.8	0.8	0.8	0.7	0.8	0.8	1.1	0.7
Activities of households as employers, etc.	0.5	1.5	0.1	0.2	0.3	0.5	0.2	0.4	0.1	0.2	0.1	0.2	0.1	0.1	0.3	0.1

Source: UNCTAD calculations based on the 2014 Myanmar Census.

Note: M: male; F: female

Female intensity of employment

After having examined how men's and women's employment is distributed across different economic sectors, this section investigates the female intensity of employment (i.e. the share of women in total employment) in major economic sectors.

Women account for more than 45 per cent of total agricultural employment in all townships except Nyaung Shwe (table 3). For its part, the

accommodation and food services sector – a major sub-sector of tourism – is a predominantly female-intensive sector across all townships. Wholesale and retail trade and public administration and social services are other important female-intensive sectors in most townships in the Inle Lake area. Manufacturing has a very high female intensity of employment in Nyaung Shwe (77 per cent), the township where manufacturing employment has the highest share of total employment.

Table 3. Female share of total employment in major economic sectors (per cent)

	Taunggyi	Hopong	Kalaw	Nyaung Shwe	Pekon	Pindaya	Pinlaung	Ywangan
Agriculture	47.4	49.7	47.8	41.3	47.3	50.6	49.1	45.6
Industry	28.3	16.5	18.8	56.5	20.9	27.7	20.1	18.3
Services	45.7	49.8	45.8	47.9	51.1	55.7	51.3	52.1
Manufacturing	55.0	38.5	45.6	76.8	42.1	62.2	42.9	47.1
Wholesale and retail trade, repair	49.3	56.4	56.2	54.3	63.4	62.3	61.0	64.7
Transport, storage, and communication	4.9	3.9	8.5	4.5	4.4	2.0	3.0	1.7
Accommodation and food services	59.1	69.4	61.8	57.4	65.0	65.0	67.2	66.9
Business and administrative services	45.5	40.0	38.5	40.9	47.9	44.5	40.5	47.7
Public administration, community, social and other services and activities	52.1	48.4	42.8	60.4	49.7	60.7	52.6	55.6

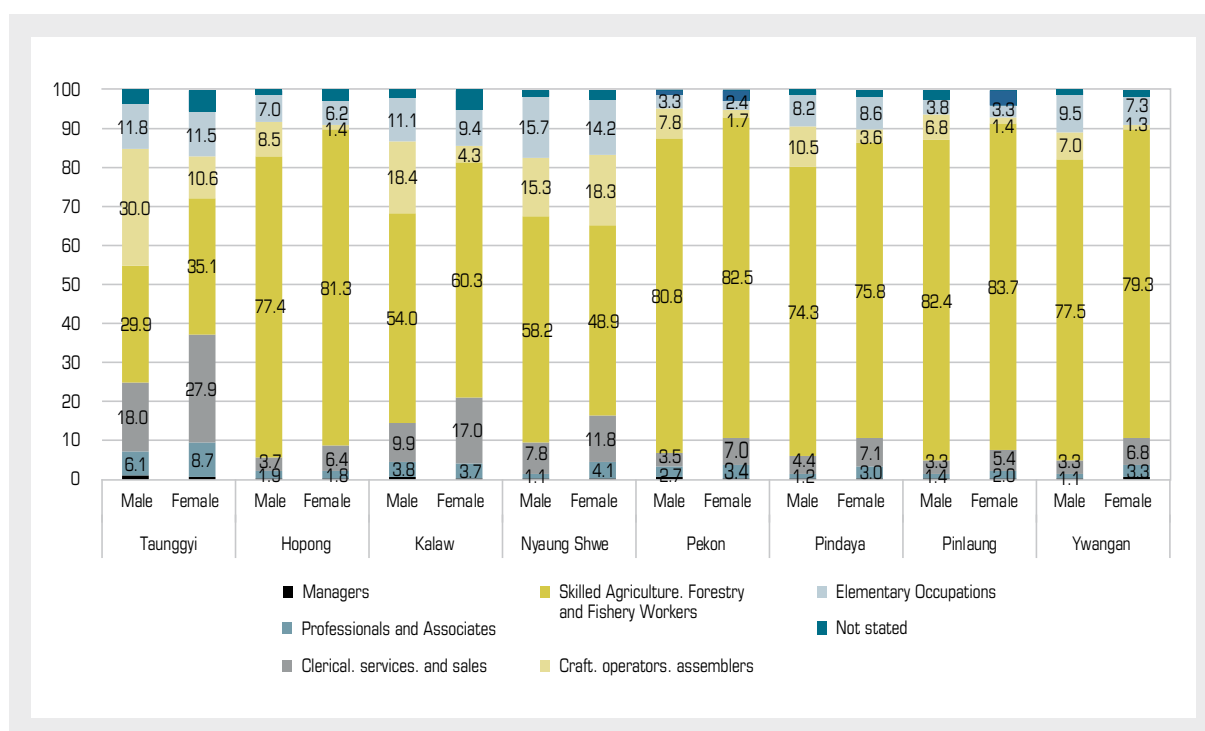
Source: UNCTAD calculations based on the 2014 Myanmar Census.

Overall, a clear gender segregation of employment by sector is evident in the Inle Lake area, reflecting a traditional and widespread division of roles and functions in the culture. Women predominate the traditionally female-intensive services sub-sectors such as accommodation and food services, and wholesale and retail trade, and to some extent public and social services. Men dominate the industrial sector and the transport, storage and communication services sub-sectors.

Employment distribution by occupational groups and work status

This section examines the distribution of women and men by occupational groups. In line with the dominance

of the agriculture sector in total employment, the majority of men and women work as skilled agricultural workers (figure 4). Reflecting occupational gender segregation, a higher share of men is employed as craft traders, operators and assemblers – the main blue-collar job category in manufacturing – in all townships except Nyaung Shwe, where manufacturing employment is predominantly female-intensive. Similarly, a higher share of women holds clerical, sales and services jobs, a traditionally female-intensive occupation. Interestingly, a higher share of women holds managerial and professional occupations in all townships except Hopong and Kalaw. However, the overall share of such high-skilled jobs in total employment is still quite low for both men and women.

Figure 4. Employment composition by occupation categories (per cent shares)

Source: UNCTAD calculations based on the 2014 Myanmar Census.

Finally, the distribution of employment by work status and sex in each selected township is investigated. Unpaid family work – one of the two forms of vulnerable employment as defined by the ILO – is the dominant form of employment status for women in all townships except Taunggyi and Nyaung Shwe (figure 5).²⁶ This reflects the overwhelming role that agriculture plays in the employment structure of these townships and the traditional gender division of labour in rural societies in developing countries.²⁷ Indeed, a significantly lower share of men is employed as unpaid family workers in the same townships. According to UNCTAD's survey of farmers, women farmers tend also to have paid jobs on other farms that complement the work they do on family farms.

Own account work – the other form of vulnerable employment according to the ILO – is the most common employment status for women in Nyaung Shwe (40 per cent) and Taunggyi (38 per cent), and the second most common for women in the other townships.²⁸ Overall, vulnerable employment is very common among employed women in the Inle Lake area. The larger share of women in these vulnerable forms of employment further inhibits their economic empowerment, with negative repercussions for poverty alleviation and economic development in the area. The share of vulnerable employment in total employment is lower for men than it is for women, even though the gender gap is quite low.

²⁶ According to the ILO, contributing family workers, also known as unpaid family workers, are those workers who are self-employed in a market-oriented establishment operated by a related person living in the same household, but who cannot be regarded as partners. This kind of work is often "invisible" and under-recognized.

²⁷ The share of women as unpaid family workers may be higher because there is not a clear-cut distinction between farm/family business-related tasks and domestic work. Most family farm/business activities take place in households, and women tend to perform production-related tasks as if these were domestic chores. Since people carrying out domestic chores are considered as economically inactive and not part of the labour force, more women might be carrying out tasks as unpaid family workers than what is captured by surveys.

²⁸ According to the ILO, own-account workers hold self-employment jobs and have not engaged on a continuous basis with any employees to work for them.

Wage and salary employment are usually considered a more stable form of employment in developing countries, but levels of such employment are quite low for women in the Inle Lake area. Less than 12 per cent of women are employed as wage/salary workers in all townships except Taunggyi, Nyaung Shwe and Kalaw, a share far below the national average of 36.7 per cent (CSO et al., 2020).

Employers hold the smallest share in total employment for both men and women, and the share in total employment is significantly higher for men, as expected.

In Myanmar, more than 400,000 people work in the garment sub-sector, and 90 per cent of them are women. Garment factory working conditions in Myanmar vary widely; whereas large foreign-owned factories provide a contract and regular payment, workers in small domestic subcontractors experience all forms of abuse (ASEAN et al. 2016).

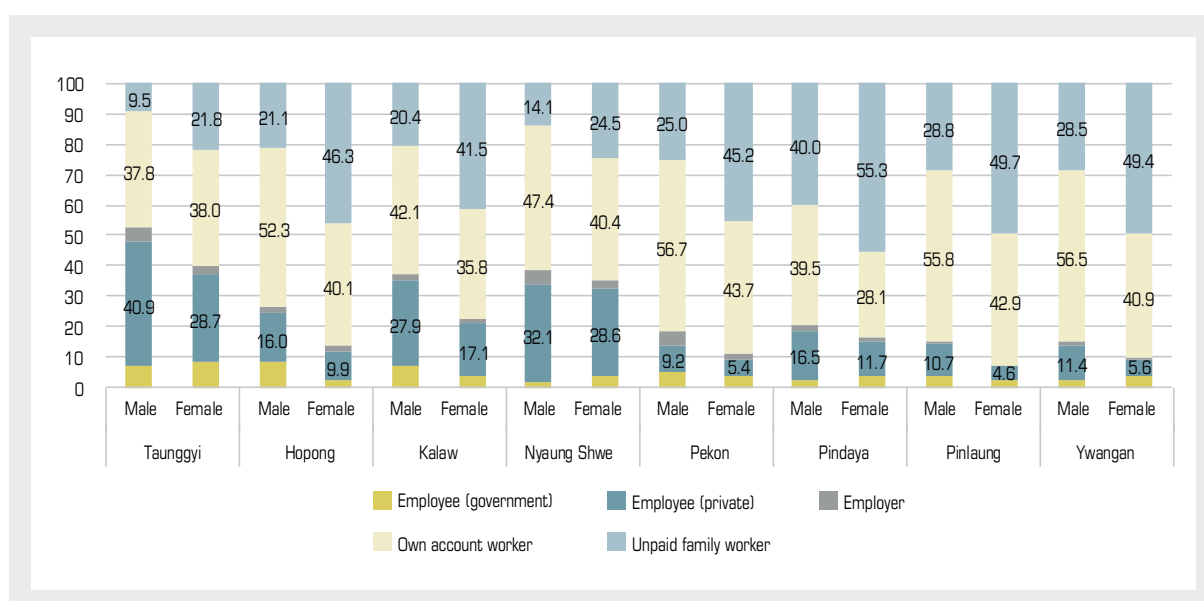
Overall, the figures on the gendered employment structure across townships show that in Taunggyi and, to a lesser extent, in Kalaw and Nyaung Shwe, gender segregation by economic activity and occupation is less severe than in the rest of the townships (i.e. women in these townships are employed in a relatively wider range of sectors and occupations than women in other townships). The development of agricultural value

chains by establishing links with other sectors of the economy such as tourism would contribute to shifting from subsistence farming to commercial production and reducing the gaps in gender composition of employment across townships. In this regard, addressing the gender gaps in agricultural productivity that result from women's limited access to resources, market information, extension services, etc. would help them participate in all nodes of the agricultural value chains and upgrade their position within different nodes.

Gender wage gap

Despite government commitments to ensure equal pay for work of equal value, the gender wage gap is significant in Myanmar and more so in rural areas, confirming that women's work is undervalued. According to data for 2017, the average male hourly wage is 24 per cent higher than that for women. Even after taking into consideration the differences in sectoral and occupational distribution, the gender wage gap remains at 20 per cent. Empirical evidence also suggests that the gender wage gap is not explained by education, level of experience, or other individual and area-specific characteristics; hence it seems to be mainly driven by discriminatory differences. The gender gap in earnings is also reflected in wage levels: 45 per cent of female wage workers receive less than the hourly minimum wage (MMK450 or US\$0.32 per hour) while only 21 per cent of men do (CSO et al., 2020). There are gender wage gaps in agriculture,

Figure 5. Employment composition by work status (per cent shares)



Source: UNCTAD calculations based on the 2014 Myanmar Census.

though the gaps vary based on occupation and region. According to the 2012 Baseline Survey Results, men are commonly paid between MMK1,500 (around US\$1.07) and MMK3,000 (around US\$2.15) and women between MMK1,000 (around US\$0.70) and MMK2,500 (around US\$1.8) per day. In the accommodation and food sectors, women earn 93 per cent of what men earn, a gap that is less pronounced than in other sectors of the economy (UNWTO, 2019).

4.3.2. TIME USE PATTERNS

According to reports on the three selected agricultural value chains, women are almost wholly responsible for unpaid care and domestic work (ILO, 2019b, 2019c; MIID, 2018). This double burden often has the effect of depriving women of the time necessary to carry out paid activities, develop new skills and participate in community activities.

According to UNCTAD's farmer survey, women spend on average 6-7 hours a day on farming activities at the family farm and 3-4 hours on domestic chores. Additional hours are devoted to care work and to water and wood collection. Moreover, additional hours may also be devoted to paid work or exchange work on other farms. The number of hours spent on household chores and care work is similar across value chains and ethnic groups. During intense planting and harvest periods, women may allocate a greater amount of time to farm activities, while the time devoted to care and domestic chores remains the same, making their overall workload very heavy.

The share of the total workforce of dependents who are not participating in the labour market is also high (around 50 per cent) in all selected townships and is largely explained by high fertility rates and the related child dependency ratio. This contributes further to women's double burden of combining paid work with unpaid domestic and care work.

4.3.3. WOMEN'S ACCESS TO DECISION-MAKING

Women's participation in decision-making processes in politics, businesses and within households is critical for their active involvement in the decisions pertaining to their wellbeing and for expressing their agency. As of 1 June 2020, Myanmar ranked 162nd out of

193 countries with respect to women's representation in Parliament – the second-lowest ranking country in Southeast Asia after Sri Lanka. Specifically, women occupy just 48 of the 432 seats (11.1 per cent) in the lower house of the Parliament (the House of Representatives) and 27 of the 223 seats (12.1 per cent) in the upper house (the House of Nationalities).²⁹ As of January 2020, only one out of 26 ministerial positions was held by a woman in Myanmar (IPU and UN Women, 2020), putting the country almost at the bottom of the global ranking (178th out of 182 countries). The shares of seats held by women in the national parliaments and ministerial positions were below both the East Asia and Pacific average.

The current situation does represent an improvement over the past, when women were almost completely excluded from policymaking. However, women still face a wide range of cultural and educational obstacles that prevent them from participating actively in politics. Local politics is even more male-dominated. Out of 6,038 candidates in the 2015 elections, only 800 were women – still a significant rise compared to the past. However, only 10 of the 133 state and region ministers were women. There was only one female township administrator out of 330, and there were 101 female ward/village tract administrators out of 16,829 (IFES, 2019).

To overcome this daunting situation, the United Nations Committee on the Elimination of Discrimination against Women has recommended that Myanmar enact temporary special measures, including statutory quotas, to address the under-representation of women, including women from ethnic and other minority groups, in decision-making positions in the public and private sectors and in political life (CEDAW 2016a).

A general election is scheduled in Myanmar on 8 November 2020 for more than a thousand seats in union, state, and regional legislative bodies. Under its Goal on Peace, National Reconciliation, Security & Good Governance (Goal 1.1.5), the Myanmar Sustainable Development Plan includes the target of at least 30 per cent participation by women in political dialogues. However, as of July 2020, no official measure has been put in place to encourage women to stand as candidates for the election or to reserve

²⁹ See IPU Parline: Global data on national parliaments at <https://data.ipu.org/women-ranking?month=6&year=2020> (accessed in June 2020).

seats for them, though at least one party in Shan State is hoping that women and youth will represent 30 per cent of its candidates.³⁰ The ruling party announced that women accounted for 20 per cent of the party's candidates – up from about 13 per cent in 2015.³¹ Still, according to gender stereotypes deeply entrenched in Myanmar's society, women are not considered well-suited to hold leading positions (United States Institute of Peace, 2019).

The situation is better as far as administrative positions are concerned: according to 2009–2010 data, an average of 52.4 per cent of staff of ministries were women. At the level of deputy director and equivalent, women held 37 per cent of the positions during the same period (ADB, et al., 2016). In terms of occupational categories, in 2019, 36 per cent of employed women were in managerial positions, and 34 per cent of them held senior and middle management positions (ILO, 2020).

Finally, women's participation in decision-making within the household is critical for their empowerment because it has direct implications for women's control of household resources and their employment outside the household. This is also an area that is more promising than the situation in politics. Among women aged 15-49 in Myanmar, 65 per cent stated that they participated in three household decisions – those related to own healthcare, major household purchases, and visiting family – in 2016.³² According to UNCTAD's farmer survey, most married women are able to take decisions regarding how to spend the household's income, independently or jointly with their husbands. In the case of single women farmers in the 18-35 age group, the family's earnings are usually managed by older women in the family. The fact that women farmers have decision-making power at the household level is positive and can be exploited if linkages between the agriculture sector and other economic sectors are established. For example, if the agricultural and tourism sectors are going to be progressively integrated, women will have a say on, among other issues, the kind of agricultural inputs the household must purchase to match the quality expectations of tourism outlets.

4.3.4. WOMEN'S ORGANIZATIONS

Women's organizations in Myanmar play an important role in advancing women's voices in decision-making processes and supporting their participation in the economy. They do so through training programmes and by advocating for the inclusion of gender considerations in national strategies and the full implementation of existing gender equality laws and policies. Some relevant organizations at the union level are discussed in box 3. Additional women's organizations exist at the state and township levels. Most women farmers who participated in the UNCTAD survey stated that they were members of formal or informal women's and producers' associations and that they benefit from the membership via training on production practices and access to information.

In recent years, the Inle Lake area has witnessed the development of women self-help groups that provide opportunities for women to meet and organize. The groups support women in many ways, including by providing micro-finance credit, organizing training on various issues, and sharing information about training and other opportunities available to women. However, they do not play a role in advocating for policy change at the state or union levels. All of the women who participated in UNCTAD's farmer survey expressed positive views about the self-help groups, and 90 per cent of them estimated that, after initial reluctance, those positive views were shared by men. This is an important development considering how strong gender stereotypes are in rural areas.

4.4. THE CAPABILITIES DOMAIN

4.4.1. LITERACY AND NUMERACY

Education and training play a key role in entering high-skilled jobs as workers, accessing and using the necessary market information, developing business skills, and applying for credit as producers and entrepreneurs. Therefore, the level of educational attainment in the society and the gender gap in education have direct implications for the trade and gender nexus.

³⁰ Hein Myat Soe (2020). Shan party emphasises women, youth candidates. *Myanmar Times*, 2 July. (<https://www.mmtimes.com/news/shan-party-emphasises-women-youth-candidates.html>).

³¹ *The Irrawaddy* (2020). Myanmar's NLD election candidate lineup with more women, Muslims. 23 July (<https://www.irrawaddy.com/news/burma/myanmars-nld-unveils-election-candidate-lineup-women-muslims.html/amp/>).

³² This figure is based on World Bank's World Development Indicators database (accessed in October 2019).

Box 3. Women's organizations in Myanmar

The Myanmar Women's Affairs Federation (MWAFF), established in December 2003, is the largest non-governmental organization (NGO) in Myanmar working on women's issues. The MWAFF reaches out at the grassroots and community levels to advance issues important to women. The federation is a member of Myanmar National Committee on Women (MNCW) and supports its efforts to ensure that national plans, policies and programmes are effectively implemented at the local level (CEDAW, 2016b). Despite its broad mandate, the MWAFF is mostly known for undertaking activities that promote health and education for families within communities (MEDA, 2015).

The Myanmar Women Entrepreneurs Association (MWEA) is the country's largest association of women entrepreneurs, with around 2,300 members, though the number of women entrepreneurs in the country is larger. According to the World Bank's 2016 Enterprise Survey, women-owned firms in Myanmar correspond to 35 per cent of all small and medium-sized enterprises. MWEA headquarters is in Yangon, but the association has an office in Mandalay and satellite groups in each region. The MWEA contributes to discussions on the implementation of the National Strategic Plan for the Advancement of Women and on issues that affect women entrepreneurs and women-owned micro and small and medium-sized enterprises (ILO, 2020).

The Myanmar Rural Women's Network May Doe Kabar - (MDK), set up in 2015, connects around 22,000 rural women and their families across eight states and regions, including Shan State. It advocates for rural women's rights and for increased services and assistance to communities. It works through a three-tiered system centered around the needs of self-reliant rural women's groups. These groups are typically comprised of 10 to 15 women members living in the same village. The MDK has taken part in activities to shape the national agenda on the role of women in peace and security, advocated for the effective participation of women in public life, and brought attention to women's unequal status in accessing finance. It also supports rural women through training programmes to improve their leadership skills and livelihoods (through loans). The network, with support from UNDP, has also developed the iWomen app dedicated to respond to the educational, information and networking needs of rural women. In 2017, the app was routinely accessed by over 10,000 users all over the country.

The Women's Organization Network of Myanmar (WON) is a network of 30 NGOs established in 2008. The primary goals of the group revolve around women's empowerment, the rights of women and girls, elimination of all forms of discrimination, increased participation of women at every level of decision-making, and peace, democracy, and national reconciliation. At least 12 member organizations of WON are involved in women's economic empowerment activities, including in Shan State.

The Gender Equality Network (GEN), established in 2007, includes more than 130 civil society organizations, national and international NGOs, and Technical Resource Persons. Its activities are geared towards bringing about gender equality and the fulfilment of women's rights in Myanmar. The GEN conducts research on key issues that form the basis for evidence-based advocacy. The network is a member of the MNCW, serves as alternate co-chair of the Technical Working Group on gender mainstreaming, and also serves as co-chair of the Technical Working Group on violence against women and girls.

Table 4. Adult literacy rate by urban/rural residence and sex (per cent of 15+ population)

		Shan	Taunggyi	Hopong	Kalaw	Nyaung Shwe	Pekon	Pindaya	Pinlaung	Ywangan
Urban	Male	89.4	97.2	95.5	97.8	98.7	94.3	99.5	98.5	97.9
	Female	81.6	91.0	80.7	91.2	95.5	86.8	97.5	90.5	94.2
	Gender Parity Index	0.91	0.94	0.84	0.93	0.97	0.92	0.98	0.92	0.96
Rural	Male	64.4	89.7	81.5	91.8	94.0	85.9	96.1	90.3	95.6
	Female	51.8	74.4	61.6	75.1	83.8	71.8	89.5	72.1	90.6
	Gender Parity Index	0.80	0.83	0.76	0.82	0.89	0.84	0.93	0.80	0.95

Source: UNCTAD calculations based on the 2014 Myanmar Census.

Myanmar has experienced a significant rise in adult literacy and numeracy over time. The gender gap in these outcomes has also narrowed. That this gap has declined significantly for younger generations reflects the influence of increasing access to education. In 2017, the female adult literacy rate was 93 per cent in urban areas and 83 per cent in rural areas; the same figures were 97 and 91 per cent for men, respectively. Ninety-three per cent of men and 86 per cent of women reported to be numerate in rural areas, whereas those figures were 98 per cent of men and 94 per cent of women in urban areas (CSO et al., 2018).

However, the high average numeracy and literacy rates mask high discrepancies across the country. Shan State scored the lowest on adult literacy (65 per cent) and numeracy (74 per cent) rates in Myanmar in 2017. Among women in Shan State, only 57 per cent reported being literate and 68 per cent numerate. However, it is Shan State that has made the most significant improvements over time (CSO et al., 2018). There are also significant discrepancies across districts and townships within a state/region. Table 4 shows the adult literacy rate among men and women and the Gender Parity Index (GPI) score in literacy in rural and urban areas at the township level.³³

Among children and youth (ages 5-29), the share who never attended school or college is comparable across townships except in Hopong (figure 5). Interestingly, a larger share of boys than girls in Pindaya and Ywangan never attended school. These two townships have

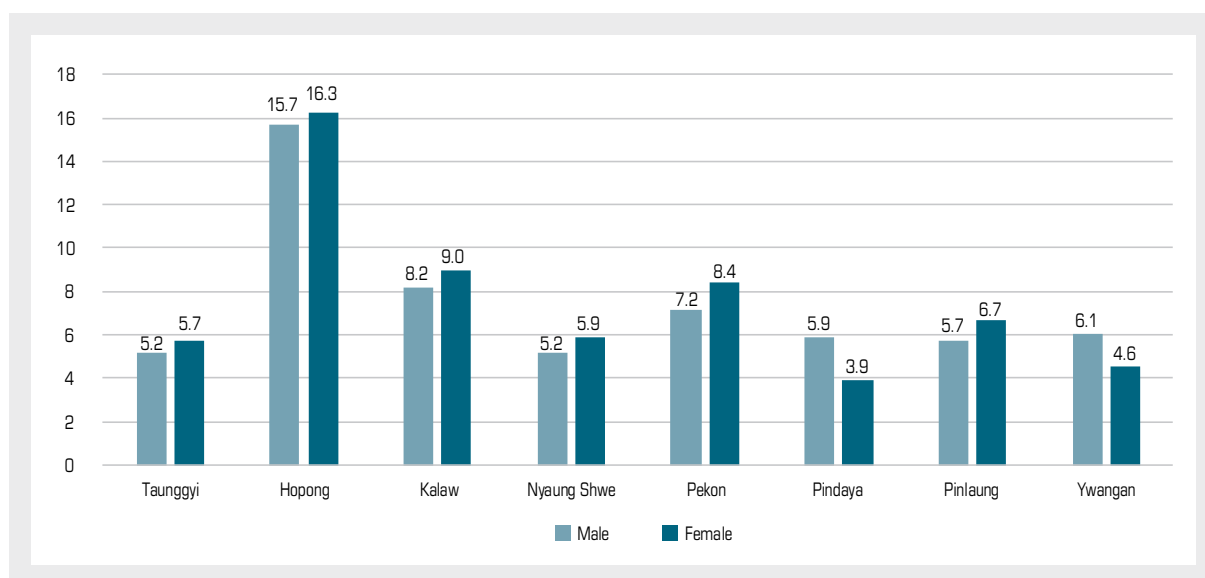
the highest literacy rates for the adult population in both urban and rural areas. Overall, the issue of young generations being completely out of the education system during school-age years is concerning and needs to be addressed to support the educational attainment of the future labour force.

Early marriage among girls is one of the reasons underpinning the gender gap in education, as marriage, childbirth and parenthood restrain their education and career choices. Indeed, Shan State has the highest number of births to adolescents (59 births per 1,000 women) in Myanmar according to 2014 Census. Moreover, thirty per cent of mothers who had their first child in their teenage years had no education across Myanmar (CSO, 2017).

The United Nations Population Fund Representative for Myanmar (UNFPA Myanmar, 2017) and other associations call on authorities to enhance gender and sex education in schools and community programmes to encourage girls to pursue their professional aspirations.

There are also factors that inhibit both women and men from attaining higher levels of education. Children from the poorest households enter primary and secondary schools later than their economically privileged counterparts. In rural areas, the nearest school is often at least eight kilometres away and the distance to school increases with the level of education. Security may represent an additional

³³ The GPI in literacy is equal to the share of female adult literacy rate to that of the male population. A GPI score of 1 shows full gender parity, and the lower the GPI, the higher the gender gap in adult literacy.

Figure 6. Share of the population (ages 5-29) that never attended school/college (per cent)

Source: UNCTAD calculations based on the 2014 Myanmar Census.

problem. There is also a shortage of qualified teachers, hence capacity-building is highly needed for teachers. The problem is further aggravated by teachers' salaries, which are insufficient to cover the cost of living. Finally, classes are usually provided in Burmese, which many students do not speak, while they speak local languages including Shan, Danu and Pa'O (SDC, 2018).

There are issues with university education as well. For example, the curricula and teaching may not fulfil the needs of the labour market (World Bank, 2019). Moreover, the fact that better-educated employees are not noticeably better off than other types of employees does not provide incentives to continue in education or invest in skill development.

4.4.2. VOCATIONAL TRAINING

While formal education is essential to get the knowledge and skills needed in social and economic life, vocational training programmes directly support workers, producers and entrepreneurs in their work areas, if tailored to their needs. As of May 2018, there were 17 vocational and technical training public schools in Shan State. Vocational and technical training is perceived to be valuable, and therefore there is high demand for it despite the high entrance requirements, notably in terms of costs and required qualifications. However, only 20 per cent of demand is met by the existing schools (SDC, 2018).

There is often a mismatch between the expectations of participants' and the training programmes themselves. According to a survey of farmers in Southern Shan (SDC, 2018), 82 per cent of respondents found only agricultural training programmes useful, while 84 per cent assessed all other vocational training as not contributing to improving their livelihoods. A slightly higher share of women (89 per cent) expressed discontent with training.

The short duration of the training programmes and their one-time nature without any follow-up were highlighted as the main issues with these programmes. The poor content of training not tailored to the interests or needs of the target population was another major issue. Indeed, 96 per cent of interviewees expressed a need for more systematic and development-oriented training. Language of instruction was raised as an issue because most training was delivered in Burmese and occasionally in English, and full command of Burmese and/or English is not widespread in the region. Concerns were also raised about how most training focused on youth (28 years old or less), and thus excluded older age groups.

Besides the issues raised about training programmes, respondents highlighted the lack of support mechanisms on how to access the necessary resources to start or expand their businesses or farms. Farmers, including landowners, lack training in business management and efficient use of resources. This is even true for

Box 4. Training on tourism for women and youth in the Inle Lake area

Some training programmes that focus on developing skills for the tourism sector have been available to disadvantaged women and youth in the area. Partnership for Change, a Norwegian non-governmental organization that works to secure economic independence for women and youth, used to offer nine-month training programmes in the hospitality and services sector at the vocational school in Nyaung Shwe. The content of these training programmes was designed in cooperation with the tourism sector to ensure that the skills developed matched the needs of tourist outlets and were in line with Association of Southeast Asian Nation standards. Training sessions were carried out in cooperation with the Ministry of Hotels and Tourism and were co-sponsored by the Luxembourg cooperation agency (LuxDev). The programmes were discontinued in May 2020.

Source: Partnership for Change (<https://pfchange.org/myanmar/?lang=en>).

businesses promoting organic farming and for social enterprises, which have increased in number in Ywangan, Pindaya and Kalaw (SDC, 2018).

Similar findings were found for the tourism sector, especially with respect to the labour force. Around 60 per cent of the firms that participated in the International Trade Centre (ITC) survey of the tourism sector administered in early 2020 stated that they had limited access to skilled labour and lamented a mismatch between the skills available and the skills they need (ITC, 2020).³⁴ These concerns must be taken into consideration when developing new training programmes in the area (see box 4).

4.5. THE SECURITY DOMAIN

Gender-based and domestic violence and harassment are factors that inhibit women's equal participation in economic and social life. They negatively affect women's right to travel, participation in paid work, access to education and training, and income-sharing within households. Throughout their lives, women in Myanmar experience emotional, economic, physical, sexual and intimate partner violence and harassment at home and in public. Ethnic women and girls face further challenges in relation to sexual and gender-based violence at two layers, both as women and girls and as members of ethnic minorities.

In one study, all women interviewed had experienced at least one type of violence, and almost all had experienced at least one form of physical abuse by

an intimate partner (Gender Equality Network, 2014). In Shan State, survey data for 2015–2016 show that more than 20 per cent of women have experienced physical violence since age 15, and that 3.5 per cent have experienced sexual violence at least once in their lives and 2.3 per cent in the last 12 months (Non et al., 2018). The actual figures could be higher than what is captured in the statistics. This indicates that violence against women is quite widespread in Myanmar, and that it appears to be somewhat tolerated by social norms that dismiss its seriousness and unacceptability.

Domestic violence against women and children has increased during the COVID-19 pandemic due to lockdown measures that have limited people's mobility. Reduced income and diminished food security have created additional tensions within households, resulting in acts of violence, as reflected by an increased number of cases of domestic violence reported to the Gender-Based Violence (GBV) hotline in the country (Aung, 2020).

Women who are victims of sexual or gender-based violence face two main issues to pursue justice that need to be addressed. First, laws in Myanmar's lack a definition of sexual and gender-based violence. As of February 2020, the Prevention and Protection of Violence against Women Law had not yet been enacted. Second, many women who are victims of violence do not have the education and/or the financial means that would allow them to have access to justice. Moreover, they often live in remote areas where legal representation is unavailable (Human Rights Council, 2019).

³⁴ The survey collected information on employment, sales, market participation, the business environment and competitiveness for 40 tourism services companies based in Kakku, Kalaw, Nyaung Shwe and Ywangan. Each area accounted for 25 per cent of the sample.



5. Sectoral analysis: Agriculture and tourism sectors



5. SECTORAL ANALYSIS: AGRICULTURE AND TOURISM SECTORS

5.1 MYANMAR AGRICULTURE DEVELOPMENT STRATEGY

According to the Ministry of Agriculture, Livestock and Irrigation (2018), Myanmar's agriculture sector is characterized by low productivity, inequality and high price volatility due to poor connectivity and unstable foreign demand. The sector suffers from decades of underinvestment in infrastructure, weak research, and poor extension and financial support services.

The 2018/2019 – 2022/2023 Myanmar Agriculture Development Strategy and Investment Plan aims to expand agriculture and livestock production, increase farmers' incomes and enhance farmers' access to international markets in order to contribute to the country's food security and economic development (Ministry of Agriculture, Livestock and Irrigation, 2018). The plan identifies "gender inequality and insufficient women's rights in agriculture" as a weakness of the agricultural system and includes several goals to improve women's lives and support their agricultural economic activities. These goals include addressing the specific needs of women farmers, facilitating their access to microfinance and their participation in cooperatives and community development activities, improving the delivery of services to women, and tailoring extension services and entrepreneurship programmes to the needs of women farmers. Overall inclusion and increased women's participation are regarded as the pre-condition for the plan to yield results. Moreover, the plan stresses that the benefits of agricultural development should be shared by different groups, including women, and that an inclusive process would lift marginal farmers and the landless out of poverty.

5.2. THE AGRICULTURE SECTOR IN THE INLE LAKE AREA: ANALYSIS OF THE SELECTED VALUE CHAINS

The Inle Lake area's fertile soil and vast natural resources make it an important trading hub for agricultural crops and a significant tourism destination. Tea, ginger and

avocado are among the agricultural crops produced in the area. Although important differences exist across the selected value chains and townships in terms of productivity and access to resources and markets, a gender-based division of labour is common to all. Men are more involved in tasks related to the preparation of the soil or ploughing, while women's work is usually related to planting, weeding, transplanting, harvesting, threshing, postharvest and marketing (SDC, 2018). However, according to UNCTAD's farmer survey, while women and men may be especially active in certain nodes of the chains, there are no activities that are carried out exclusively by men or by women. As mentioned in section 3.3.2, women take on most, if not all, of the responsibilities of household chores and care work, which add to their work on the farm, creating a double burden.

One of the main obstacles to developing and modernizing the agriculture sector seems to be linked to the way many farmers in the Inle Lake area see their activity. According to UNCTAD's field observations in the selected townships, 95 per cent of both male and female farmers do not regard farming as a business, but rather as a traditional activity that their communities have been carrying out for centuries to satisfy their family's needs. This attitude translates into the fact that most farmers do not have tangible plans to enhance productivity or clear ideas about how to improve the quality of their production. Coupled with the many supply-side constraints faced by farmers, this results in a failure to meet the quality and quantity standards required by traders, processors and final consumers. As discussed in section 4.4.2, the limited availability of training programmes targeting the specific needs of farmers further contributes to the lack of dynamism in the sector. Scarce accessibility to agricultural tools – even basic ones like tractors – exacerbates the problem.

According to UNCTAD's farmer survey, women farmers, despite their overall secondary role in most households, enjoyed autonomy in negotiating the purchase of basic agricultural inputs, the price of their produce, and loans not provided by commercial banks.³⁵ However, more sophisticated and expensive inputs were negotiated by their husbands or other

³⁵ Of the 60 women who participated in UNCTAD's farmer survey, 42 said that they negotiate the loans themselves. All of the women said that they either negotiate on their own or share the negotiating power with their husbands. Due to the limited sample size, this remains an ad hoc observation subject to further testing.

male family members. Contract farming³⁶ is not widespread in the Inle Lake area. Only one respondent from UNCTAD's buyer survey reported having used contract farming in transactions with women farmers. In general, farmers are reluctant to sign contracts, preferring verbal arrangements with buyers. This is due in part to their low literacy levels – as noted in section 3.4.1, Shan State has the lowest level of literacy in the country. It is also due to the fact that, traditionally, deals do not need to be written and signed. Buyers are not keen to sign contracts either, both because they trust their usual suppliers but also because in case of failure to deliver, they can turn to other suppliers. When deals between buyers and women farmers are made in written form, women are those signing the contracts and, in most cases, receiving the payment.

Most women farmers from the area sell their products to traders or processors. In rare cases, they sell directly to enterprises, such as tourism outlets, mostly through contracts established by an NGO or another institution. This is the case for Golden Ground Organic Farmers Group in Pindaya, which set up business links between its members and an international wholesale company specializing in serving the needs of hotels, restaurants and caterers.

All of the women farmers interviewed by UNCTAD sell their products in their own townships in the Inle Lake area, while 60 per cent of them also sell in other markets in Shan State. Only a few farmers across different ethnic groups sell in markets outside Shan State. None among the interviewed farmers sell in foreign markets. More than two-thirds of the farmers cited limited production capacity as the main obstacle preventing them from selling their production abroad. It was followed by lack of certification, inadequate financing mechanisms, and insufficient support by export promotion agencies. UNCTAD's survey of associations pointed to women's limited entrepreneurship skills, time poverty, lack of self-confidence, and gender stereotypes as the most serious impediments to the expansion of women's

businesses. The shift to higher-value-added products and better access to market information were singled out by the associations as key areas of intervention to strengthen women's businesses and set up linkages with the tourism sector.

These findings confirm those from the assessment conducted by the ILO and the Sasakawa Peace Foundation (2020).³⁷ Women entrepreneurs listed difficult access to information about foreign markets and how to reach them as a main constraint. Not knowing what requirements products must meet abroad and having had little exposure to trade fairs and export-oriented seminars, women entrepreneurs do not feel ready to export. Limited production capacity and language barriers represent additional obstacles.

Among existing business associations in agriculture, the Myanmar Fruits, Flowers, Vegetable Producers and Exporters Association (MFFVPEA) is the most active, providing leadership and guidance to its members. In Southern Shan, it supports the value chains of mango in Taunggyi, avocado in Hopong and tea in Pindaya. The role and activities of MFFVPEA could be expanded in the Inle Lake area to support women farmers' access to foreign markets in all three value chains.

Despite the unique comparative advantage of the area in agriculture, including in the production of organic produce, ginger and avocado are rather new commercial crops in the Inle Lake area. Ginger has been an annual crop produced mainly in Southern Shan, while farmers have been reluctant to plant avocado due to lack of access to local and foreign markets (SDC, 2018). Conversely, tea has for been produced and commercialized in the Inle lake area for a long time. It is noteworthy that women are involved in producing one or more of the three selected products and often grow these products along with other products, such as fruits and vegetable.

The main characteristics of the three selected value chains are summarized below.

³⁶ According to FAO (2017), contract farming can be defined as agricultural production carried out according to an agreement between a buyer and farmers, which establishes conditions for the production and marketing of farm products. Typically, the farmer agrees to provide agreed quantities of a specific product. These should meet the quality standards of the purchaser and be supplied at the time determined by the purchaser. In turn, the buyer commits to purchase the product and, in some cases, to support production through, for example, the supply of farm inputs, land preparation and the provision of technical advice.

³⁷ The assessment was carried out during the period from October 2018–March 2019. It included desk research, interviews with 23 stakeholder organizations in Nay Pyi Taw and Yangon; three focus groups attended by women entrepreneurs mainly from Yangon and surrounding townships, and a survey of 208 women entrepreneurs. The purpose of the assessment was to identify the specific obstacles that women face to set up a business and make it grow.

5.2.1. TEA

Southern Shan produces 25 per cent of tea exports from Myanmar, which is the world's eighth-largest world producer of tea (ILO, 2019b). The two key products that are manufactured from the raw tea leaves in Southern Shan are green tea (for national and international markets) and fermented tea (for the national market). In the Inle Lake area, green tea and fermented tea appear to be manufactured largely at the household level using traditional methods (ILO, 2019b). For example, some farmers use sun-drying and firewood during the roasting process for green tea. For fermented tea, they bury the dried leaves underground or store them in a cool and dark place during the fermentation process. More developed tea industries also exist in Shan State, with production factories located in the tea-growing areas that use, for example, pasteurization machines. Processing and packaging facilities are clustered in Mandalay, the country's tea trading hub. The main tea-producing areas of Southern Shan and Inle Lake include Pindaya, Ywangan and Pinlaung, while the main market is Pinlaung. Mainly small-scale farmers undertake the production of tea (an estimated 25,000 metric tonnes of tea) in Southern Shan.

Tea producers face various supply-side constraints that include inadequate agricultural and processing practices (e.g. for pruning, the use of soil inputs, and hygiene standards), labour shortages, limited access to finance, insufficient access to infrastructure for storage, processing and packaging, and inadequate certification mechanisms. These shortcomings reduce the potential to create high-value-added products (ILO, 2019b). More than 60 per cent of women producers who participated in the UNCTAD's farmer survey believe that they would benefit from more training to be able to improve the quality, quantity and variety of their production.

The German development cooperation agency GIZ is supporting the improvement of production techniques and encouraging farmers' groups and/or villages to build proper factories for tea processing. However, progress is limited because local consumers are satisfied with the artisanal way tea is processed and because prices are rather low due to heavy competition from China, making investments in facilities difficult to afford. An additional problem is lack of a common strategy among tea producers and competition

for brands between producers and townships (for example Pinlaung and Pindaya). Moreover, many small farmers do not see growing and processing tea as a proper business and are therefore little prone to pursue quality and quantity improvements.

Women are involved across different nodes of the value chain, from plucking fresh tea leaves, processing, and packaging them to selling them as green tea (ILO, 2019b). In large tea farms and processing companies, women form the bulk of the labour force and their share in the labour force is particularly high during the harvest season. They are preferred to male labour due to issues of alcohol and drug abuse among men (ILO, 2019b). Small producers in the Inle Lake area use a system of mutual aid within their communities to meet their labour demand, while larger producers hire both men and women whenever they are free from work on their own farms. According to UNCTAD's farmer survey, men and women in Pinlaung and Pekon get the same daily wage to harvest tea.

Despite rather strong domestic demand, tea prices tend to fluctuate, as most tea producers harvest increased amounts of tea at the same time. ILO (2019b) also points out that buyers often take advantage of their better access to information and impose very low prices on small-scale producers, who tend to be price-takers. The production of organic produce by small farmers is in its infancy. Local markets are the most common outlets for small-scale women tea producers to sell their products, mainly to local customers.

5.2.2. GINGER

Ginger is another important agricultural crop in the Inle Lake area. It is grown in the Pindaya and Ywangan lowlands and in Aungpan, Pinlaung, Kalaw, Hopong, Hseseng, Taunggyi, and Nyaung Shwe, mostly on lower hillsides and flat lands. According to research by MIID (2018), approximately one in four farmers in Kalaw and Nyaung Shwe grows ginger. Around 60 per cent of ginger produced in Myanmar is exported, and demand for higher-quality and organic ginger is increasing in Europe and the United States. The ginger supply chain is a source of seasonal employment for almost 20,000 people in Southern Shan (ILO, 2019c) and production is undertaken mostly by smallholders.

Ginger cultivation and production is quite a labour-intensive process due to basic mechanization and the challenges resulting from the topography of the

area. Women form most of the workforce (between 50 and 70 per cent) and are mainly involved in planting, weeding, burning, harvesting, cleaning and sorting, while men's tasks include husbandry, ploughing, furrowing and land preparation. Women's workload tends to be heavier than men's, since their tasks are less mechanized than those performed by men. Women are less aware of health risks related to the use of chemicals, since they are less exposed than men to training and information on the safe use of chemicals. Most households rely on family support and reciprocal community practices for labour, although hired labour is also sometimes used (ILO, 2019c).

Ginger is harvested eight to 10 months after planting and is commercialized as a spice or medicine. It can be marketed as fresh or dry ginger, ginger powder, ginger oil, ginger oleoresin, ginger ale and other similar products (Burgess, 2017).

Poor knowledge about varieties and how to make the best use of them limits farmers' ability to receive a premium price and/or to reach a broader number of consumers. Some varieties are better for fresh consumption while others are more useful for oil extraction or processing into ground ginger. The development of the sector is also limited by lack of finance, market connections and marketing strategies – notably for organic ginger – and by production conditions such as soil erosion (Burgess, 2017).

According to UNCTAD's farmer survey, women producers of ginger predominantly sell the fresh, unprocessed product. However, to cope with price fluctuations, some farmers have switched to the production of dry ginger that makes access to storage a necessity. Indeed, access to quality storage ranks

among the top three requests for assistance put forward by ginger growers.

Organic produce, often requested by international buyers, is rarely produced by women farmers. No farmer in the UNCTAD sample produces ginger according to organic standards, and only one farmer, a member of Golden Ground in Pindaya, declared her produce to be free of chemicals. None of the respondents engage in the production of ginger derivatives.

The quality of ginger produced by women farmers often does not match the standards requested by international markets. Although they do not directly export their produce, women ginger growers who participated in the UNCTAD survey are aware of quality issues, and close to 50 per cent of them believe that they lack training on how to improve the quality, quantity and variety of their produce. Improving the quality of ginger could expand opportunities in foreign markets, and ginger from Shan State could partially replace Chinese products that are often rejected in destination markets, especially in Europe and North America, for quality reasons (ILO, 2019c).

Agricultural practices that inhibit increased product quality as well as limited access to certification are additional challenges faced by ginger producers. The example presented in box 5 shows how the capacity of farmers to meet buyers' requirements is limited. Moreover, the lack of information on the dangers of chemical inputs and the benefits of ecological processes inhibit transitioning to organic production and certification (ILO, 2019c; Burgess, 2017). The sector also lacks infrastructure, notably in irrigation, and mechanization for value addition.

Box 5. Difficulties in meeting quality standards

The private sector partner of Mennonite Economic Development Associates (MEDA) in Myanmar, known as GEA, bought ginger from farmers in Pindaya, Kalaw and Aungpan in 2018–2019 through contract farming. However, most of the ginger harvest was of no use for GEA because it did not meet its quality standards. The main issues were that ginger had white spots when washed as a result of soil diseases, and that the size and tuber formation characteristics were not adequate for export.

Because of high demand from India and Bangladesh, farmers were nevertheless able to sell the produce to foreign markets at good prices that were higher than the price in the domestic market. Those foreign buyers did not require high-quality standards. As a result, farmers started feeling that the quality requirements imposed by GEA were unnecessary and a negative opinion about GEA started to spread among them.

Source: UNCTAD field observations.

The MFFVPEA is working on setting up a Southern Shan association of ginger producers, but according to UNCTAD's survey of associations the process is progressing slowly because of limited interest from ginger producers due to fluctuating prices.

5.2.3. AVOCADO

Avocado production in Myanmar has recently enjoyed strong growth and is estimated at around 120,000 metric tonnes per year. In Southern Shan, commercial avocado production is found in Hopong, Taunggyi and to the east side of Inle Lake. Some small-scale production can be found in Nyaung Shwe, Ywangan and Pindaya (ILO, 2019c).

Poor agricultural practices limit quality and yield, as does mixed local varieties being planted in the same plot. There are over 70 local varieties of avocado, and more varieties are being imported from abroad. Farmers in the Inle Lake area report inadequate knowledge and information about variety selection, plant trimming and harvest methods as main obstacles, with negative repercussions on fruit size and quality, according to UNCTAD's farmer and farmer associations surveys. Available evidence suggests that only a small proportion of avocado production meets international standards (ILO, 2019c).

Findings from UNCTAD's farmer survey show a growing interest among women farmers in avocado production. Almost 30 per cent of avocado growers included in the survey stated that they had started avocado planting only recently and that their avocado trees would bear fruits only in coming years. The survey did not inquire about the avocado varieties planted, although data suggest that women farmers are aware of the unsteady quality of many local varieties compared to the Hass variety, which is the most common commercial variety worldwide. Forty-five per cent of female avocado growers stated that they would need more training to improve the quality, quantity and variety of their produce. They would also need financial support and better access to storage and market infrastructure to cope with price fluctuations during the year.

UNCTAD's survey of buyers from the tourism industry found that most hotels and restaurants source avocados locally at market stalls. According to ILO (2019a) findings, sourcing of horticulture

products in local markets is typical for all types of accommodation providers and restaurants except upscale large hotels, which source from trusted producers that are able to meet quality standards of high-end clients. Local markets thus remain the main outlet for fresh avocados used by (domestic) tourists and more common tourism facilities. However, UNCTAD's farmer survey revealed that small-scale women avocado producers typically do not sell in local markets, but rather rely on buyers and intermediaries, and are therefore unlikely to have direct business contacts with hotels and restaurants.

5.2.4. ORGANIC AGRICULTURAL PRODUCTION AND GOOD AGRICULTURE PRACTICES

While the switch to organic agriculture, or the certification of agricultural production that is de facto already organic, seem to appeal to some farmers, others prefer to use chemical fertilizers, pesticides and herbicides because they offer a cheap solution. The difficulty in meeting the requirements for obtaining an organic production certificate and the administrative hurdles involved also discourage farmers from pursuing organic production. Farmers in the Inle Lake area, however, have started to be aware of the negative impact of excessive use of chemical inputs on human health and the environment, according to UNCTAD field observations.

In a positive development, the Ministry of Agriculture, Livestock and Irrigation launched Myanmar's standards for organic agriculture in January 2019. The standards are fully harmonized with the Standards for Organic Agriculture developed by ASEAN. The Department of Agriculture plans to put in place a certification body for organic products and issue certifications of organic production for all crops through inspection bodies. Since the establishment of the responsible bodies was ongoing as of August 2020, no crop had yet been certified as organic.

Under the leadership of the Myanmar Organic Growers and Exporters Association (MOGEA), the Golden Ground Organic Farmers Group in Pindaya organizes training on organic farming and provides organic inputs to its network members. The MOGEA is striving to attract more farmers in the area, especially ginger farmers, in order to penetrate the

organic market in Yangon and supply a recently established international wholesale company that sells to hotels, restaurants and caterers. Golden Ground also helps villages obtain the Participatory Guarantee System (PGS) certificate.³⁸

There are examples of community-based tourism in connection with organic agriculture in the region. For example, Danu ethnic communities in Ywangan are active in organic agricultural practices and environment protection awareness, and they have started community-based tourism by linking tourism activities (e.g. hiking, pursuing) with their organic orange, coffee and tea farms and indigenous orchids. Similarly, the Pekon PGS Group, which practices organic farming in the mountainous area, has established links with Lwal Pan Sone Community-Based Tourism in Pekon. This type of tourism is new in the area, and the group has a long-term vision for its initiative. Geographical remoteness, however, creates challenges for tourism development in the area.

There is a need for targeted policies to support the viability and sustainability of organic agriculture and to link it with community-based tourism. They include advisory services and training on business development, subsidies and loan support programmes for new investments in these areas, and formulation of market linkages. The needs of women farmers and tourism enterprises should also be taken into consideration in the design of such programmes to ensure that women benefit from them. In fact, the Department of Agriculture has been providing training on Myanmar Good Agricultural Practice (GAP) since 2014 and issuing GAP certificates to farmers since 2016.³⁹ All farmers in Southern Shan State who received the certificate were trained by METRO Wholesale Myanmar on crop production handling. In June 2020, the National Standard Council endorsed the “Myanmar GAP standard for Crops” as a national standard that covers all crops except rubber and cotton.

5.3. TOURISM

5.3.1. LEGAL AND INSTITUTIONAL FRAMEWORK

The 2012 Myanmar Responsible Tourism Policy provides the platform for developing tourism strategies at the national and regional levels. It includes nine aims, one of them being “broad-based local socio-economic development.” Each aim is linked to action points and the identification of institutions responsible for implementation. The action point particularly relevant to ensure women’s beneficial participation in tourism is the one geared to maximize opportunities for local communities through employment in various kinds of tourism enterprises. For Shan State, the Directorate of Hotel and Tourism’s regional office is the focal point for this action point. The policy recognizes the positive role that women play in households and communities, and that enhanced employment opportunities for women deriving from tourism would contribute to overall wellbeing and development. Moreover, page 23 of the policy states that “the provision such as artisan and craft training or other focused tourism training to expand the skill base of women can considerably enhance the socio-economic situation of families and improve family and community life. Responsible tourism is to ensure equality in the employment conditions of women.” This is an important commitment considering that women likely represent at least half of all tourism workers in the country. It remains to be seen which instruments will be put in place to ensure the fulfilment of the commitment.

The 2013–2020 Myanmar Tourism Master Plan, the first such plan in the history of the country, is based on the Myanmar Responsible Tourism Policy and aims to make tourism a leading tool for the country’s economic development and for income and employment generation. Its approach is inclusive – the economic benefits of tourism should be shared equally among the population, including both men and women. The plan includes seven cross-cutting issues. Of special relevance for this report are the two that refer to gender issues:⁴⁰

³⁸ The PGS is a locally focused quality assurance system. It certifies small-scale organic producers based on active participation of stakeholders and is built on trust, social networks and knowledge exchange. The PGS provides an important alternative to third-party certification programs, since inspections are carried out by peers – typically other farmers in the area.

³⁹ In Southern Shan, 19 certificates were issued during the fiscal year 2016–2017, and 217, 157 and 184 during the following budget years.

⁴⁰ See pages ii and iii of the 2013–2020 Myanmar Tourism Master Plan, available at <https://tourism.gov.mm/wp-content/uploads/2019/05/myanmar-tourism-master-plan-english-version-min.pdf>.

- “All tourism policies and development planning will include gender analysis. Men and women will have equal access to economic opportunities, skills training, employment, resources, and decision making.”
- “Steps will be taken to ensure prior and informed consultations are made with relevant stakeholders, as well as the provision of timely and accurate disclosure of information, to promote gender and ethnic inclusiveness, and enable the incorporation of stakeholder views into decision-making processes.”

It is unclear how the implementation of the plan will be monitored, including its goals of gender inclusiveness.

In order to avoid the benefits of expanding tourism being mainly captured by foreign investors, with limited spillovers to the local economy, the plan encourages community-based tourism, which provides employment opportunities for local people, contributes to preserving local cultural heritage, and can be particularly beneficial to women. While it is promoted by several international and national NGOs, community-based tourism is still in a development stage in Myanmar. As of July 2020, there were 17 projects for community-based tourism in 41 villages. An additional seven projects in 10 villages are in the pipeline and expected to become operational soon.

The institutional setting for tourism is complex, with many bodies involved. The Ministry of Hotels and Tourism is the governing body in charge of tourism. As foreseen by the law, Regional Tourism Committees have been set up in regions and states. The Shan State Tourism Committee was set up in 2019 and is responsible for, among other things, collecting data, developing destinations, issuing tourism licenses, and managing training. The Inle Lake Management Authority, a body set up in 2015 to put in place measures to protect the Inle Lake, is expected to play a key role in tourism in the future, especially in the field of destination management on the basis of the 2014 Destination Management Plan.

5.3.2. TOURISM IN THE INLE LAKE AREA

The Inle Lake area is the most popular tourist destination in Southern Shan. Tourism in the area has increased rapidly over the last decade, with the number of visitors jumping from around 22,000 in the early 2010s to 179,000 in 2016 (ITC, 2019). In

a reversed trend, however, data from the Ministry of Hotel and Tourism indicate that the presence of international tourists in Southern Shan fell by 28 per cent from 2017 to 2018 due to ongoing conflicts in Rakhine State. The downturn was offset by domestic travellers, whose presence in Southern Shan increased by 25 per cent over the same period and who now outnumber international tourists by 2.5 times (ILO, 2019a). In the Inle Lake area, many “family tourism enterprises” such as small hotels, guesthouses, souvenir shops, restaurants and recreation activities coexist with large businesses, notably international hotel chains and tour operators that mainly serve foreign tourists. There are important differences across the townships in the area in terms of tourism development, with the most popular tourism destinations being Taunggyi, Nyaung Shwe and Kalaw (ITC, 2019).

According to a survey in 2018 by the Ministry of Hotel and Tourism in Southern Shan, half of international tourists come from Europe (mainly Germany, France, Spain and the United Kingdom) and the United States. They increasingly organize their own trips instead of relying on tour operators (ILO, 2019a). Foreign tourists who visit Southern Shan mainly seek a cultural experience (35 per cent), relaxation (25 per cent), or authenticity (24 per cent). Domestic tourists have quite different motivations for their travels. Specifically, 64 per cent of Myanmar nationals visited Southern Shan as pilgrims, according to data for 2014 (Michalon, 2018). Festivals are important venues for domestic tourists visiting the area for the purpose of religion. For example, the Phaung Daw Oo pagoda festival in October and the Taunggyi fire balloon festival in mid-November each attracts more than 100,000 pilgrims. Temporary markets are set up in the area and represent an important income opportunity for shop/stall owners. Shops and boutiques are also found around the pagodas. While the main reason for traveling is religion, the religious element increasingly blends with the recreational one. As a result, travellers become inclined to buy a variety of items and increase their spending. The presence of pilgrims in these venues also provides the opportunity, especially for men, to offer driving and tour guide services (Michalon, 2018).

The amount of spending by foreign and local tourists is different, with foreigners (MMK26,500 or around US\$19) spending significantly more than nationals (MMK19,000– around US\$13) for a product on

average, according to a recent survey (ITC, 2020).⁴¹ There are also differences in the expectations and preferences of local and foreign tourists. For example, foreign tourists prefer comfortable accommodations in high-end hotels, while domestic tourists tend to choose guesthouses and monasteries. Domestic tourists enjoy the crowded spaces in religious festivals and local markets, where they can buy inexpensive touristic items, such as sarongs and other traditional cloths, bags and souvenirs from the Inle Lake area, and imported items from China and Thailand that reflect Asian identity and modernity. Foreign tourists, on the other hand, usually prefer less crowded places and look for more sophisticated and expensive items such as jewellery and antiques. However, the difference in taste, expectations and behaviour between the two groups of tourists is narrowing, especially when considering affluent visitors from Yangon and Mandalay (Michalon, 2018). Southern Shan is also increasingly appealing to young foreign tourists, who opt for guesthouses, eco-lodges and other budget accommodations.

Despite its natural beauty, the Inle Lake area is experiencing severe environmental degradation with a rapid shrinkage of water surface and declining water quality. The lake's biodiversity and ecosystems have been seriously endangered. Many factors have contributed to this outcome: deforestation of the mountains surrounding the lake, increased cattle grazing, excessive use of pesticides (including uncertified ones) and fertilizers linked to the floating gardens, sewage runoff, and climate change. The exponential growth of tourism, if not well managed, will increasingly represent a threat to the health of the lake. In a positive development, in June 2015 Inle Lake was designated by UNESCO as Myanmar's first Biosphere Reserve under the framework of UNESCO's Man and the Biosphere Programme. The main purpose of the Biosphere Reserves is to achieve a sustainable balance between the goals of preserving biological diversity, boosting economic development, and maintaining cultural values. This may then open new opportunities for

sustainable economic development and attract development funds (UNDP, 2015).

This section next looks into gender segregation in the labour market in the tourism sector and the relationships between buyers in tourism and sellers of agricultural produce. According to UNCTAD's buyer survey, women are present in large numbers in low-skilled job positions (e.g. cleaning, kitchen work, etc.) but also carry out more skilled tasks, such as accounting and clerical work, and increasingly hold managerial responsibilities. The survey sample includes no female tourist guides or marketing experts, which is likely due to the small sample size. In fact, in Shan State there are 274 female national guides out of a total of 500, according to data provided in July 2020 by the Taunggyi office of the Directorate of Hotels and Tourism. Women are also active as entrepreneurs in the hospitality sector in the Inle Lake area. This likely reflects the positive impact of low entry barriers in tourism sector.

However, tourism enterprises and institutions in the region are not very efficient. The ITC (2020) survey reveals that most tourism companies have no collaboration with local tourist institutions.⁴² Those that have engaged with those institutions lamented the poor quality of services provided. More than half of tourism companies reported not having participated in any trade fair in the previous 12 months. Moreover, only around a quarter of participating firms hold a quality certificate granted according to national, regional or international standards. This low level of certification is ascribed by the firms to the limited availability of information on standards and related certification procedures.

Of the total number of firms that participated in the ITC survey, 56 per cent are women-led.⁴³ Sixty per cent of women owners/managers have no other earning activities, whereas most men tend to manage their tourism companies together with other jobs.

Restaurant and hotel owners share their purchasing needs with suppliers. The most common requests

⁴¹ The baseline survey collected information on employment, sales, market participation, business environment and competitiveness for 40 tourism services companies based in Shan State. The survey was conducted in the four regions of Kakku, Kalaw, Nyaung Shwe and Ywangan. Each region accounted for 25 per cent of the sample.

⁴² They include the Southern Shan State Zone of the Union of Myanmar Travel Association, the Myanmar Hoteliers' Association, the Myanmar Restaurant Association and the Myanmar Tour Guide Association.

⁴³ Women-led firms are those managed by a woman who has at least a 30 per cent ownership share.

refer to the freshness of products, compliance with hygiene standards, reduced use of pesticides and other chemicals, and proper packaging. However, buyers do not provide any formal training to suppliers to meet their standards. Most local low-range hotels and restaurants rely on local markets to buy the products they need, while direct purchases from farmers are the second most used source of supply. Supermarkets do not constitute an important source of supply either for hotels or for restaurants, according to UNCTAD's buyer survey. High-end hotels and restaurants, on the other hand, rely on trusted producers who can ensure the supply of products that meet quality and safety standards (ILO, 2019a).

Although training is not provided to suppliers of agricultural produce, most tourism outlets provide training to their staff on firms' core services, marketing and management objectives. According to the ITC (2020) survey, half of the surveyed firms in the region provide such training to their employees.

5.4. LABOUR MARKET CHARACTERISTICS IN THE AGRICULTURE AND TOURISM SECTORS

As of August 2020, there were no formal statistics regarding employment structure, working conditions and the gender wage gap in the specific value chains at the township level. Field studies provide the main source of information toward this end. According to a study by the ILO (2019a), producers in the tea value chain pay male workers up to twice more than they pay female workers because they think that men carry out tasks that are deemed dangerous or physically demanding. A similar justification was put forth by producers in the avocado value chain, who paid male workers on average MMK5,000 (around US\$3.60 per day) and female workers only MMK3,500 (around US\$1.40 per day) (ILO, 2019c).

A study by USAID (2018) documents a gender wage gap for the same type of work in the Inle Lake area. Even though the gender wage gap varies depending on the specific task and area, men are usually paid between MMK1,500 (US\$1.70) and MMK3,000 (US\$2.10) and women between MMK1,000 (US\$0.70) and MMK2,500 (US\$1.80) per day. There are other studies on the area suggesting that the gender wage gap differs across value chains; it may be higher or lower than the one suggested by the above studies or even disappear in the event of labour shortages (MIID,

2018; MEDA, 2015). For example, women and men employed as casual labourers on Pinlaung and Pekon farms report getting the same wage.

The gender wage gap also exists in the tourism sector. However, it is still lower in tourism than in the broader economy. In Myanmar, women's earnings as a percentage of men's earnings for equivalent work was 83.7 per cent in the broader economy as opposed to 93.1 per cent in the accommodation and food services sector (UNWTO, 2019).

In terms of working conditions in the tourism sector, there are significant differences both across tourism destinations and between large and small tourism establishments. For example, it is mostly large tourism establishments such as international hotels that comply with Myanmar labour laws (ILO, 2019a; ITC, 2019). In contrast, workers at small businesses often do not have formal contracts and a regular flow of income due to seasonality. Temporary and seasonal work also deprives workers of non-wage benefits such as sick leave, paid maternity benefits, unemployment insurance, etc.

There are also issues with the implementation of labour laws. First, workers have limited awareness about their labour rights and about commitments to gender equality. Even when they are aware of them, mechanisms for complaining or making a claim are by and large non-existent. MCRB (2017) reports that there are no grievance mechanisms for sexual harassment for female workers in hotels and tour operations across all locations. There is a need for policies, programmes and laws to reduce gender-based harassment and abuse at the sectoral and national levels.

Despite these shortcomings, there have been positive changes in the tourism industry. For example, some of the large hotel chains have introduced steps towards gender equality in recruitment and training and provide social benefits to their employees such as three-month maternity leave (MCRB, 2017). Hotel and restaurants that participated in UNCTAD's buyer survey said that they provide training to their employees on customer service, interpersonal skills, safety in the workplace, hygiene and food safety. The hotels and accommodation sector, in particular, can play an important role in supporting women's economic empowerment. International hotel chains and large tourism enterprises usually follow labour and gender equality legislation, as well as job creation for

disabled persons, in a more effective way than small tourism outlets where the terms of employment may be less clear, especially for women (ITC, 2019).

5.5. LINKAGES BETWEEN THE AGRICULTURE AND TOURISM SECTORS

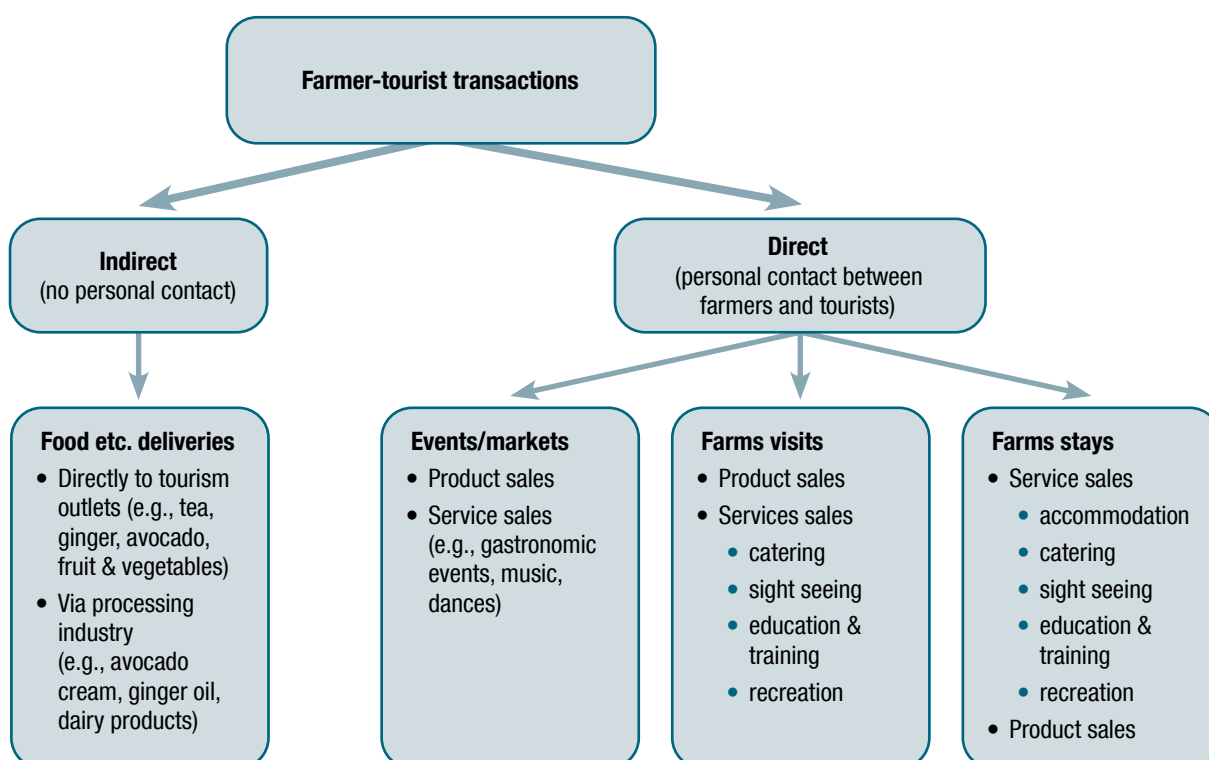
The interface between tourism and agriculture was described using a graphic conceptual model (see figure 7 below). Accordingly, the domestic and external economies are linked via tourists who, while abroad, consume agricultural goods and services either directly - for example by visiting farms, or indirectly through hotels, restaurants, and other tourism outlets. The model also links domestic farmers and foreign tourists via agricultural exports that extend the period of consumption of domestic goods by tourists during the period preceding or following their travel (Fisher, 2019). The same model can apply to domestic tourists coming from other states in Myanmar who visit Southern Shan.

Farmers can sell their produce to local shops/stalls or other forms of intermediaries, from where tourism

enterprises can buy their agricultural produce. It is also possible to directly sell to hotels and restaurants as well as large buyers such as supermarkets, though it is less frequent.

Building this link between the three horticultural value chains covered in this study and the tourism sector requires both the matching of buyers' and sellers' expectations and the infrastructure necessary to facilitate this match. Indeed, tourism operator respondents to UNCTAD's survey of buyers expect central and local governments to make the necessary investments in infrastructure (e.g. transportation and roads, storage, processing and packaging facilities, electricity and water, equipment and technology, etc.). They also call for support to farmers in order to develop their production, processing and entrepreneurial skills. This would allow farmers to become reliable partners for the tourism sector. Storage, processing, and packaging facilities constitute a key step of the production process that creates added value, helping farmers weather price fluctuations and meet the standards set by traders, processors and final domestic or foreign consumers.

Figure 7. The in-country transaction interface between farmers and tourists



Source: Fischer (2019)

There is also a need to create incentives for farmers to reach out the tourism sector. According to UNCTAD's farmer survey, the likelihood of supplying their products to tourism outlets is sufficiently remote for most farmers, and especially women farmers, that they could not even identify the obstacles to doing so. Owners of tourism enterprises, on the other hand, stated that better prices and more reliable product delivery would stimulate their demand for tea, ginger and avocado produced by local women farmers.

Producer associations can be instrumental in helping women farmers sell their produce – ideally, high-value-added varieties – to tourism enterprises. They can facilitate business linkages between women farmers and small-scale hotels, including boutique hotels that are appealing to international tourists and affluent local tourists, and to restaurants. By using the services of buyers/intermediaries, women farmers could reach larger and more established tourism outlets. In this case, support measures could be introduced for farmers to meet certification or other contractual standards to meet the demand by these entities.

Community-based tourism can also support the development of linkages between the agriculture and tourism sectors. Linking visits to tourist attractions to a stay on a farm could enhance the value of the tourism experience, though some legal obstacles still exist for this to happen. Since the market demand for handicrafts and cultural tourism products tends to be saturated, agricultural products could create a new niche in the market as an attraction for tourists.

Field findings show that community-based tourism indeed can serve as a long-term channel to build linkages between the agriculture and tourism sectors. According to an ILO (2019a) survey, domestic tourists in Southern Shan enjoy food tasting and cooking classes. They also favour visiting a tea farm during trekking. These tourist preferences could also extend to other products, including ginger and avocado, and to recreational activities such as tasting, harvesting produce, holding competitions to identify specific varieties, and organizing educational activities on nutrition, the medical benefits of ginger and the different use of ginger powder, oil, etc. United Nations agencies involved in the project, in particular the ITC and UNIDO, are already working on the development of these innovative tourism options. Further possible ways of developing sectoral linkages between the three horticultural value chains and the tourism sector

in the Inle Lake region are discussed in the policy recommendations section in detail.

5.6. SUPPLY-SIDE CONSTRAINTS FACED BY WOMEN IN THE AGRICULTURE AND TOURISM SECTORS

The Inle Lake area has many comparative advantages in both the agriculture and tourism sectors. Over the past decade, the area has seen positive changes in important areas such as infrastructure development and expansion (e.g. transportation and communication, electricity and safe water supply), increased availability of micro-credit loans for both women and men, improvements in security, and expansion of education (e.g. opening of more schools) (UNDP, 2012). Despite these developments, however, the area continues to be one of the poorest in Myanmar. Farmers and producers face many supply-side constraints that are more heavily felt by women, as discussed in this section.

According to a survey by the Centre for Diversity and National Harmony in 2018 in the selected townships, 80 per cent of interviewees – both female and male farmers – said they had difficulty accessing markets outside their neighbourhoods, and more pronouncedly international markets. Women reported experiencing more difficulties than men (SDC, 2018). Sixty-four per cent of the respondents said they lack necessary equipment for enhanced production, 57 per cent said they get very low prices for their produce, and 43 per cent said they had major difficulties with land titling. Other supply-side constraints include limited access to credit and high interest rates on loans, both misinformation and lack of information regarding markets, lack of business-related skills and infrastructure-related issues such as poor road conditions (especially in rural areas), unreliable electricity supply, limited irrigation and access to clean water, and limited access to certification facilities (SDC, 2018).

According to UNCTAD's survey of associations, the most serious problem impeding women's efforts to make their activities more sustainable is inadequate skills, including entrepreneurship skills, time poverty, low level of literacy, lack of self-confidence and gender stereotypes. Nearly 30 per cent of associations also regard ethnicity and lack of language skills as an obstacle to business expansion.

The findings from the surveys administered by the Centre for Diversity and National Harmony and UNCTAD are confirmed by the assessment of women's entrepreneurs by the ILO and the Sasakawa Peace Foundation. That assessment found that the greatest obstacle women wanting to start a business face is access to financing, followed by finding customers, obtaining information about the process to set up a business, and finding a suitable location. Women entrepreneurs also reported access to financing as the main limitation to expand their business. They identified inadequate familiarity with ICT, paucity of qualified personnel and limited family support as additional barriers (ILO and Sasakawa Foundation 2020).

The subsections that follow focus on supply-side constraints faced by women in the tea, ginger and avocado value chains. The tourism sector is analysed in the context of its actual and potential linkages with the selected agricultural value chains.

It is worth noting that Myanmar lacks a strategy to link women producers/entrepreneurs to local and global supply chains. While value chain programmes are being implemented in the tourism sector, the absence of attention to the specific hurdles women face and women's limited participation in decision-making de facto exclude them from such programmes (ILO and the Sasakawa Peace Foundation, 2020)

5.6.1. EXTENSION SERVICES

Access to extension services is one of the key supply-side constraints faced by farmers. In a survey by the Swiss Agency for Development and Cooperation (SDC 2018) in Southern Shan, 87 per cent of women and 67 per cent of men cited lack of access to information on modern farming as a problem, notably concerning learning and acquiring modern farming techniques and/or enhancing crop varieties, seeds or production. Myanmar's Agriculture Development Strategy recognizes that linking research, education and extension creates a virtuous circle that the country should aim to pursue (Ministry of Agriculture, Livestock and Irrigation, 2018).

Extension services in the Inle Lake area are provided by both the government and a wide range of non-governmental actors. The latter include supplier shops, NGOs, religious groups and self-help groups.

Government as a service provider

Most extension services (particularly involving the provision of inputs) are reserved for those who have their names on land titles (Land Use Certificates), therefore excluding most producers, and particularly women. Those who do not have a certificate but want to access government extension services must apply for a certificate and get two recommendation letters from their communities (MEDA, 2015).

The extension services provided by the government largely fall short of demand. This is the outcome of many factors, most notably the lack of resources to support the travel of field officers to villages to deliver training programmes – only 50 to 70 per cent of budget requests by field officers are granted. In addition, field officer wages are very low, which leads many to remain in their job only for stability while searching for alternative and more promising income sources (UNOPS, 2015). Other reasons why government extension services largely fall short of demand include the (i) unbalanced allocation of funds at all levels and lack of transparency on budget allocation, (ii) low subnational government capacity and the unsuitable/discriminatory processes to provide services to farmers, (iii) strong focus on rice and the resulting neglect of high-value cash crops, and (iv) lack of trust between the government and ethnic groups (Burgess, 2017). Limited access to extension services jeopardizes government strategies to modernize the agriculture sector, promote international and national investment and trade in agriculture, and develop rural areas (UNOPS, 2015).

Non-governmental actors

In the Inle Lake area, and in Myanmar in general, farmers' associations are still relatively new bodies with limited experience and presence, which means that there is no competent and representative body to consult about reforms in the agriculture sector. Associations of tea and avocado producers and exporters that operate in the Inle Lake area do not work with smallholders – or if so, do so only marginally – and do not provide training. There is no association for ginger, and the Agriculture and Farmers' Federation does not operate in the Inle lake area.

Reaching women farmers

Extension services tend to primarily reach men (Akter et al, 2017), and they generally do not take targeted

Box 6. Success stories

Not only the amount of extension services available but also the way those services are provided is critical to their success. Drivers of successful extension services include the following:

- Gender sensitization as an integral part of technical training
- Identification and appointment of gender champions within each value chain
- Innovative funding
- Training provided to all trainers working with women
- Identification of the most receptive groups
- Development of business linkages

Studies of the Inle Lake area show that projects on value chain development that included women and gender sensitization not only had a positive impact on women's empowerment, but also increased the number of men who changed their perception about women's role and empowerment. For instance, Myanmar Institute for Integrated Development (MIID) projects that were inclusive of women in Pa'O villages not only increased small-scale mechanization and led to higher rice yields but also improved the status of women in their families and created work and leadership opportunities for them. Within families, women were more open to express their opinions and most men were glad to get more support from their wives. Women were represented among the professional staff of all MIID implementing partners and some governmental departments, and in many villages women started participating more actively in meetings and training sessions. Furthermore, such an approach seemed to have brought better education for children and improved food security. That said, wages for female labourers remained lower than those for men in all villages (MIID, 2018).

Mennonite Economic Development Associates (MEDA) is another case in point. This organization works exclusively with women farmers to develop their value chains. MEDA identifies the villages that are receptive to women's economic empowerment, and works with local non-governmental organizations or key facilitating partners and with the private sector. Key facilitating partners in turn work with village development committees to negotiate, coordinate and communicate with women farmers and the community. In each village, they select and train a focal person who can support women farmers in capacity-building and business linkages with local market actors. MEDA forms partnerships with the private sector (e.g. financial service providers) with the aim of supporting businesses while simultaneously improving women farmers' access to markets, goods and services.

Another success story is the initiatives implemented by local partners working with the United States Agency for International Development, which have had interventions to develop value chains, including ginger, in Kalaw, Pindaya, Ywangan, Taunggyi, and Pinlaung. These initiatives saw their greatest impact when gender champions – selected from among producers, private sector partners or grantees – were identified and appointed within each value chain. Partnering with women's associations such as the Women's Organizations Network, Myanmar Women Entrepreneurs Association, and Gender Equality Network proved to be very effective in integrating gender issues across the value chains. Other key contributors to success were grants and training provided to producers, processors, producer organizations, and extension services on key topics, including training to enhance men's and women's understanding of the benefits of sharing resources, income and assets. Moreover, men were involved in the transformation process aimed at supporting and empowering women (USAID, 2018).

approaches to include women, for example by considering time and mobility issues, even when the aim of the training is to integrate women. For example, most women cannot drive to get to a training venue, and most training is held at times and locations that are inaccessible for women. As a result, women's participation rate in training organized by MIID implementing partners is, on average, only 22 per cent. In addition, information about training activities is not always advertised through the communication channels commonly used by women. For example, while the MFVPEA team on value chains for rural development produced a video documentary on women's leadership, only about 10 per cent of the trainees who participated in the activity were women (USAID, 2018). Access to training is a bigger challenge for women farmers also because of the gender bias in the composition of field officers (i.e. few extension service jobs are available to women).

According to UNCTAD's farmer survey, social media, trade portals and websites are not means of information presently favoured by women, who rely instead on word of mouth or on associations to get the information they need. This is an area where associations could play a role in facilitating women's access to other and more reliable means of information, such as online platforms and web sites.

Women self-help groups provide training to increase women's exposure to information on market prices and new farming techniques. They also support women by recommending ways to get better prices for their products, for example by aggregating their produce, sharing transport or trading responsibilities.

Training focused on gender sensitization and women's empowerment are largely absent in the delivery of extension services because the trainers supporting local value chain development themselves have limited exposure to gender sensitization training (USAID, 2018). There is also a disconnect between training on women's empowerment and gender equality (e.g. speaking in public, negotiation for women's empowerment, gender equality and women's rights) and training targeting farmers' activities (e.g. production techniques, financial literacy and business management skills). In addition, these training sessions are often not coordinated with savings and loan activities provided by other NGOs or savings groups at the village level. According to the SDC (2018) survey in

Southern Shan, 76 per cent of respondents were of the view that there is a need for in-depth training programmes, not only on agricultural practices but also on gender discrimination, gender inequality and gender-based violence. Still, some initiatives have proved successful, as described in box 6.

5.6.2. ACCESS TO INPUTS, TECHNOLOGY AND INFORMATION

Value chain development and women's empowerment cannot be sustainably achieved without adequate access to inputs, technology and information.

Inputs

Issues with the cost and quality of seeds and other inputs and the high reliance on imports from China and Thailand are among the main barriers to improving farming techniques in the Inle Lake area (SDC, 2018; Burgess, 2017; ILO, 2019c). It has been reported that enhancing access to good quality and appropriate inputs and building supply-side networks for farmers should be among the key priorities of Shan State (SDC, 2018).

Technology

The lack of machinery and tools to increase production and process raw materials is one of the major difficulties identified by farmers of Southern Shan (SDC, 2018; ILO, 2019a, 2019c; Burgess, 2017). In the Inle Lake area, production is labour-intensive and there is little evidence of contract farming or other systems to promote scale access to technology. According to UNCTAD's farmer survey, motorized grass cutters and knapsack sprayers are the only equipment widely accessible in the area, while even small tractors are seldom available. Yet, a few positive stories have been reported even though on modest scale. One involves farmers offering machinery services to other farmers once they finish working on their own land. The second involves the MIID, which has procured two-wheel tractors for some villages. Tractors were initially given to individual farmers who were responsible for maintenance and repair while being obliged to provide services to other farmers (MIID, 2018).

Processing raw materials is a key aspect of the value chains being studied. Enhancing access to machinery and facilities to add value to raw materials would not only increase farmers' incomes but also reduce their vulnerability to low prices and price fluctuation.

Expanding and improving the processing of raw materials would also help create more stable jobs and help farmers develop new products.

Gender inequality is also evident in access to technology. Surveys and interviews conducted with women show that when a new technology is acquired either in the household or the community, men are always the ones to learn how to use it, as men often receive direct training in the supply shop and share the knowledge among themselves. Women are usually not taught how to use the new technology and men tend to keep the acquired knowledge to themselves (USAID, 2018). As a result, women's technological literacy and confidence about using new technologies remain low. Results from UNCTAD's farmer survey confirm that accessing information about technology remains challenging for women, as does identifying and getting in touch with technology providers.

The issue for women farmers, however, is not only getting access to and familiarizing themselves with the new technology, but also having the financial means to buy or rent new machines and therefore be able to compete with other farmers (UNOPS, 2015).

Information

Access to information is an important supply-side constraint in all of the value chains selected. Merchants, brokers and retailers, and truck drivers provide information on market issues such as varieties, quality and prices, but in most cases this is done on an ad hoc basis and not systematically, and cases of abuse of market power have been reported (UNOPS, 2015; ILO, 2019a, 2019c). Information on new markets or international markets is not formally provided.

According to UNCTAD's farmer survey, access to information on production practices and on markets, as well as the identification of those who can provide reliable information, remain challenging for women. When seeking information on supplies and markets, women farmers tend to rely on traditional channels, mainly word of mouth. Close to 90 per cent of women farmers included in the survey of farmers affirmed that they had access to a Smartphone and 55 per

cent owned one, but their use of the Internet to seek market information is not widespread.⁴⁴

There has been some development of mobile phone applications for agricultural use in the area. For instance, the Greenway Agri-Livestock mobile app disseminates information on agricultural technologies. According to UNCTAD's farmer survey, however, to date there is no evidence of widespread use of such applications among women farmers.

Another means of access to information is independent publications, which provide market information on the selected value chains. However, their use in the Inle Lake area is limited due to language, literacy and accessibility issues in rural areas, especially for women, considering the gender gap in literacy.

5.6.3. INFRASTRUCTURE: TRANSPORT, ROADS, WATER AND ELECTRICITY

Access to infrastructure such as transportation, roads, water and electricity is critical for all farmers. It is a particularly important issue for women because limited access to these different forms of infrastructure also affects women's security and time poverty in addition to their productive capacity and access to markets. Therefore, improvements in these areas and reduced gender inequality in access to infrastructure would directly benefit women.

In recent years, the Ministries of Home Affairs, Construction, and Border Affairs and the Department of Rural Development of the Ministry of Agriculture, Livestock and Irrigation have been implementing rural infrastructure projects such as roads, tracks, dams, reservoirs and canals. These improvements have contributed to a better trading environment and reduced transportation costs and enhanced crop production and quality for farmers, reduced the severity of impact from drought, and multiplied cropping and greening of the area (MIID, 2018). There have also been projects that targeted women as beneficiaries, such as training to install solar plants for women from remote areas and the least developed villages who face difficulties with transportation.⁴⁵ That said, remote areas and their female populations within

⁴⁴ In Shan State, 46 per cent of women and 57 per cent of men use mobile phones, and 17 per cent of women and 23 per cent of men used the Internet, according to the 2017 Myanmar Living Conditions Survey (CSO et al., 2018).

⁴⁵ One example is a project by the Myanmar Women and Children Development Foundation in cooperation with the Barefoot Collage (India).

the Inle Lake area have benefited marginally from these projects due to their geographical location, poor access to services, past conflicts and transitions from opium production to other income sources (ADB et al., 2016).

Transport and mobility

Projects that facilitate access to markets are important for the selected value chains. For instance, within the ginger value chain, the MIID project developed a seed bank facility that helped farmers develop linkages with markets. The project dramatically reduced the time and cost to farmers, as they could deliver their harvest to the seed bank, avoiding the need to go to markets (Burgess, 2017).

In the selected townships, ownership of a motor vehicle is very limited; on average, 1 to 3 per cent of people own a car, truck or van in all townships except Taunggyi, where the ownership rate is 9 per cent.⁴⁶ This situation is particularly cumbersome for women. Due to social norms, rural women do not commonly drive any type of automobile, although some do ride motorbikes (USAID, 2018). According to UNCTAD's farmer survey, women rely heavily on private transport to reach markets, but they consider it unreliable. Moreover, the closest roads/collection points are rather far away from households in almost all townships under review, making it necessary for farmers to walk more than 30 minutes to reach the pick-up and drop-off points. Women travelling at night is perceived negatively by society and is a major personal risk factor. Besides affecting women as producers, issues with access to stable and safe transportation also affect women searching for jobs in other places. Therefore, when planning new infrastructure, it is critical to ensure that it is gender-sensitive and to keep in mind women's mobility limitations and needs.

Roads

Road conditions are central to transportation. Roads are under-developed in the Inle Lake area, as they are in most of Myanmar. This is a serious handicap for connecting farmers with markets and tourist outlets, and for supporting growth of the tourism sector. Lack of quality roads increases travel time and cost between destinations. In addition, in the case of tourism, it

restricts visitors' movement and the development of tourism activities within the entire area.

Roads in Southern Shan vary in their condition and are currently being upgraded and paved. However, most are still unpaved tracks, especially at the village level. Further, many paved roads lack proper drainage and cannot be used during the rainy season (MIID, 2014). Nevertheless, farmers in some townships are benefitting from the fact that roads are accessible most of the time for trucks that can transport their produce to markets and access information on market prices. However, some villages in the townships under review, such as Pinalaung, Nyaung Shwe and Kalaw, remain very difficult to reach because of poor roads.

On a positive note, there have been improvements in the development of roads linking the northern townships of Southern Shan to Muse in Shan North. The modernization of the Taunggyi-Kengtung road has also given farmers in Southern Shan access to markets in China and Thailand (SDC, 2018). However, the area would benefit from enhanced access to other parts of Myanmar and to other international markets, which would enable farmers to get a higher return on their production.

Electricity

The supply of energy to vulnerable households and businesses is inextricably linked not only to improvements in the quality of life and easing the difficulty of household chores but also to enhancing livelihoods and increasing contributions to GDP (MIID, 2018).

There are clear links between efficient and reliable access to energy and women's wellbeing. When energy resources are poorly managed or scarce, women must invest a greater portion of their daily time meeting the energy needs of their household. Moreover, the use of solid fuels for cooking and heating causes high levels of indoor air pollution, which, in turn, has a greater detrimental impact on women's health.

Another issue related to energy access is the role that energy plays in women's small-scale income-earning activities. Women's micro-enterprises are often heat-intensive (food processing) and/or light-intensive (home-based cottage industries in which work is carried out in the evenings). As a result, lack of adequate

⁴⁶ Based on 2014 Myanmar Census 2014 data in CSO et al. (2018).

Box 7. Electricity in Myanmar

According to data from the Ministry of Electricity and Energy, as of October 2018, 43 per cent of households in Myanmar were connected to the electricity grid. A new electrification project was announced in February 2019 to cover three states, including Shan.

Electricity supply in Southern Shan State is far from matching demand. Daily electricity outages are common, as are problems with low voltage and brownouts. The Inle Lake area is relatively well connected as the lake is the main water supplier to the Law Pi Ta hydropower dam and the thermal power station at Kalaw. Nevertheless, tourism destinations suffer from severe electricity outages, and accommodation facilities are forced to rely on generators.

The impact of an increased number of hotels and other tourism outlets is expected to increase the demand for electricity, adding more pressure on existing supply. Transmission and distribution upgrades are also urgently needed (MIID, 2014).

energy supplies for these activities and/or high energy prices affect women's ability to operate these micro-enterprises profitably and safely. The development of the tourism sector, which is important in and of itself and as a source of demand for agricultural goods, is also threatened by poor electricity services (box 7).

According to the UNCTAD survey, women farmers residing in Pindaya and Pinlaung access electricity through village grids, while those in Ywangan rely mostly on hydropower and those in Kalaw, Nyaung Shwe and Hopong mainly use renewable energy sources. Use of energy sources in Pekon is rather mixed. The survey indicates that the use of diesel generators, batteries or kerosene is not common, since no respondent indicated they use such options. More than six of every 10 respondents, though, said that energy was expensive. Interestingly, the unreliability of energy sources was not mentioned as a significant difficulty faced by farmers.

Water

The Inle Lake area faces challenges regarding access to water. At present, most farmers do not have access to irrigation technology and depend instead on rainwater and well/spring and river/lake water. Many projects are being implemented to support access to irrigation for women farmers, but such projects remain few (ADB et al., 2016).

Easy access to clean water is critical to increase the value-added of production, reducing women's time burden and addressing health considerations. According to UNCTAD's buyer survey, access to

reliable sources of clean water is among the key factors needed to improve women's business activities. As mentioned in section 3.3.2, women mainly shoulder the burden of collecting water. In addition to providing access to water, it is also important to support women's participation in water management systems. In a positive development, more and more women in Myanmar are studying civil engineering and architecture (ADB et al., 2016).

Pressure on water access also comes from development of the tourism sector. Tourists typically have higher demands for water consumption than local residents (e.g. bathing, drinking, wastewater systems). Currently, most of the water used by the accommodation sector comes from on-site wells. Increases in water consumption will undoubtedly have impacts on the water table, and the hill areas are already affected by lack of water during the dry season (MIID, 2014). Therefore, increased demand for water will require improved approaches to water management – not least wastewater management. At present, in the tourism sector wastewater is mostly treated on-site by hotels with septic systems. Some larger hotels employ high-level technologies, while others use basic soak-away systems (ILO, 2019a; ITC, 2019; MIID, 2014).

5.6.4. ACCESS TO FINANCE

Access to finance is one of the most important supply-side constraints faced by producers. Accessing low-interest-rate loans is critical for investment and business development as well as for reaching markets outside farmers' townships. According to a survey in Southern

Shan, the primary reasons why people borrowed were to repay a previous loan (42 per cent of interviewees) and to cover immediate needs (41 per cent), with the figures comparable between men and women. Other reasons for getting a loan were investing in equipment (20 per cent of interviewees), raw materials (18 per cent) and infrastructure (13 per cent) (SDC, 2018). Since insurance or social protection schemes are not available for smallholder producers in Myanmar, only loans can help them overcome downturns.

Informal sources dominate access to borrowing in Myanmar and are used by 31 per cent of the population (Dalberg Global Development Advisors, 2018). According to the SDC (2018) survey in Southern Shan, half of the loans were from friends or family (the share is higher among women) and the remainder was from lenders in the ward or village (i.e. informal lending).

Informal channels of borrowing may require some collateral but largely take into account the borrowers' reputation. Most models are faith-based lending groups and do not have any binding contract to repay a loan. Another common practice in Shan State is merchants and brokers extending credit for crop supplies (notably, fertiliser and pesticide). This option is most often provided along ethnic lines, as it requires a degree of confidence and trust. For example, agricultural input shops prefer to sell and provide credit to producers belonging to their own ethnic group or village (MEDA, 2015; MCRB, 2017).

Women are more likely than men to report borrowing money from family and friends, women self-help groups and NGOs, instead of from government agencies or village funds (SDC, 2018). This is confirmed by the results of UNCTAD's farmer survey: microcredits made available by NGOs and the private sector are by far the most common form of financing for women farmers. Women from the townships under review reported in particular taking loans from the Pact Global Microfinance Fund. Some women farmers get loans from input suppliers, especially to buy fertilisers. Women ginger and tea farmers highlighted that while

micro-credit organizations provide loans at reasonable interest rates, the repayment periods are short. This may force them to borrow money from informal sources that charge higher interest rates but allow a longer repayment period. UNCTAD's farmer survey suggests that small women farmers are extremely unlikely to benefit from commercial bank loans, as only one respondent claimed to have obtained a loan from a commercial bank. This may be explained by women's lack of collateral, such as land or business titles, and their more limited social networks in the ward or village. Half of those interviewed also stated that they were afraid to borrow money and prefer to run their business without it.

Another issue with micro-finance institutions voiced by women entrepreneurs is the loan's ceiling, which is considered too small to make serious investments – for instance, to purchase inputs such as high-quality seeds, fertilizers, and pesticides. Small and medium-sized enterprises (SMEs) are therefore blocked from raising the productivity of their cropland or other businesses. Finally, interviewees in Southern Shan lamented international donors' use of technical instruments that in practice exclude their target population. For instance, in Taunggyi township, the World Bank's loans to farmers and SMEs require SME certificates and financial statements for a two-year business term. Yet most SMEs, in particular those owned by women, rarely have or can submit such documentation (SDC, 2018).

The Department of Cooperatives of the Ministry of Agriculture provides capital to farmers and SMEs through credit and rural cooperatives that apply low interest rates, and there are also other government organizations and specialized agricultural development companies that provide credit (Chipchase et al. 2014). However, a proper land title is necessary to have access to such credit, resulting in non-farm rural households and female-headed household being de facto excluded. Moreover, women's participation in rural cooperatives is very limited (Ministry of Agriculture, Livestock and Irrigation, 2018).



6. Conclusions and policy recommendations



6. CONCLUSIONS AND POLICY RECOMMENDATIONS

This report has examined three horticulture value chains (i.e. tea, avocado and ginger) and the tourism sector in the Inle Lake area in Myanmar in the context of the gender and trade nexus. This section presents policy recommendations based on the findings of the report. Myanmar's patriarchal society often attributes a secondary role to women relative to men in all public and private spheres. Time and mobility constraints, lower levels of education, language barriers, ethnicity-related tensions, and limited access to productive resources (land, inputs, technology) and to information and networks make it particularly hard for women to fully benefit from their work, despite their playing a crucial role in the economy. Moreover, women's lack of self-confidence, lack of experience in decision-making and public life, and lack of awareness of their rights, along with widespread domestic and gender-based violence, represent further obstacles to women's economic and social empowerment. This situation is confirmed by the low position the country holds in international rankings related to gender equality and women's empowerment.

The key policy recommendations from the report are outlined below.

6.1. STRENGTHEN LEGAL FRAMEWORKS AND THEIR APPLICATION

Myanmar has put in place legislation, plans and strategies to socially and economically empower women, recognizing that sustainable development cannot be achieved without women's involvement. While this is laudable, in Myanmar, as in many countries, there is a discrepancy between the commitments to empower women and the actual situation confronting women in their everyday life. Laws that are meant to have a positive impact on women's empowerment and economic participation are not always fully implemented, and in several cases the entities that should be responsible for operationalizing them are not yet in place or lack adequate human and financial resources or negotiating power. Monitoring mechanisms are often lacking. At times, there are too many institutions involved in implementation, with overlapping assignments, as is the case in Myanmar

for the legal framework for tourism. The 2013–2022 National Strategic Plan for the Advancement of Women remains generic and fails to articulate clear steps and milestones for reaching its stated goals. While the Constitution enshrines the principle of non-discrimination, it contains references to women as mothers, reinforcing stereotypes about the roles of women and men in society and in the economy. It also allows certain functions to be reserved to men. Several pieces of legislation continue to include gender discriminatory clauses. Myanmar has not enacted legislation on abuse and sexual harassment in the workplace. Adherence to customary rules and social norms remains of paramount importance for women and men. While customs may differ across ethnic groups, by and large they assign a secondary role to women relative to men. This situation is not different in Southern Shan, where, in addition, ethnic conflicts expose women and girls to additional difficulties, including forced displacement and sexual violence.

Land titling remains a thorny issue in the country, including in the Inle Lake area, where a sizable portion of the population does not have land titles. Even though the law grants women and men the same land rights, the woman's name is rarely on land deeds and rarely appears on the certificates issued by the government for the right to work on a piece of land.

Changes in the legal setting would provide women with a strong empowering framework that they would be able to use in the private and public spheres. The necessary changes include removal of gender discriminatory clauses in the Constitution and in other laws, full implementation and monitoring of recent legal reforms that promote gender equality, approval of the bill on violence against women that has been pending in Parliament since 2013, development of a legal framework on sexual harassment and abuse in the workplace, capacity-building to recognize and respond to cases of violence, abuse and sexual harassment, and recognition of the primacy of gender equality principles enshrined in statutory law over customary rules.

Myanmar has not ratified the ILO international conventions related to equal pay for women and men for equal work, non-discrimination in the field of employment and occupations, and domestic work. In June 2019, the ILO General Conference adopted Convention 190 concerning the elimination of violence and harassment in the world of work. Ratifying and

implementing that convention and others could represent a further step for Myanmar to improve women's working situation, and to participate in global efforts and dialogue on these issues.

6.2. UPGRADE EDUCATION OUTCOMES AND IMPROVE THE QUALITY OF VOCATIONAL TRAINING AND WOMEN'S ACCESS TO IT

Shan State had the lowest adult literacy and numeracy rates in Myanmar in 2017, and the situation is particularly critical for women. Although the Inle Lake area reports levels of literacy higher than the average in Shan State for both men and women, its literacy rate in rural areas is much lower than in urban areas, and across urban and rural areas women are less educated than men. Girls' early marriage is one of the reasons underpinning the gender gap in education, as marriage, childbirth and parenthood restrain women's education and career paths. The rate of births to adolescent girls of the Taunggyi district is also one of the highest reported in Myanmar. This should serve as a call to authorities to enhance gender and sex education in schools and community programmes so as to encourage girls to pursue their professional aspirations.

There are also factors in the Inle Lake area that inhibit both girls and boys from attaining higher levels of education, including the distance from schools and poor public transport to reach them, the shortage of qualified teachers, language barriers, and a mismatch between the curricula and the needs of the labour market. Investment in public infrastructure related to education, such as school buildings and transportation, as well as in human capital (e.g. training teachers, addressing language barriers) is needed to fill the gap in literacy and numeracy in the Inle Lake area. Gender norms and stereotypes that inhibit girls' education should be targeted through awareness-raising campaigns and monetary incentives directed to families.

In the Inle Lake area, around 80 per cent of households are engaged in agricultural activities. According to the Ministry of Agriculture, Livestock and Irrigation (2018), the agriculture sector is underperforming. The many supply-side constraints farmers face result in their failure to meet the quality and quantity standards required by traders, processors and final consumers. The limited

availability of training related to agricultural practices and to business and entrepreneurship development contributes to the lack of dynamism in the sector. Access to technology – even essential inputs such as tractors – is scarce in the Inle Lake area, further exacerbating this situation. Moreover, according to UNCTAD field observations, many farmers in the Inle Lake area see agriculture as a traditional activity that their communities have been carrying out for centuries to satisfy family needs, rather than as a business. This negatively affects their perceptions about the need to upgrade production and represents an additional obstacle to modernizing the agriculture sector.

Available training opportunities are often inadequate in terms of targeted areas, depth of content, frequency and follow-up. As a result of assigned gender roles, women face more obstacles than men in accessing training programmes. Modernizing the agriculture sector and establishing links between agriculture and other economic sectors, including tourism, cannot happen without upgrading farmers' knowledge and skills. Based on UNCTAD's surveys of women farmers and of associations, a strong call emerges for higher-quality and well-planned training opportunities that are better tailored to farmers' actual needs, conducted on a regular basis, accompanied by follow-up activities, and that take into account gender obstacles such as women's mobility and time constraints. A needs-based assessment of training opportunities should be carried out through consultations with stakeholders in targeted sectors. There is also a need to convey the message across these training programmes that farming is a business activity that needs to be approached professionally and not just as a tradition to carry on. Developing skills through training programmes is critical to improve women's productive capacity. Central and local government interventions, in cooperation with the private sector and civil society, are needed toward this end.

This report has also noted a disconnect between technical training on production and business development, on the one hand, and training that focuses on women's rights and enhancing women's autonomy, on the other. There is a need to combine these two components in training programmes to expand women's professional capabilities and encourage them to venture into new activities, including those in the tourism sector. Supporting women's self-help groups would be useful in this regard, since those groups are among the few that work on strengthening

women's self-confidence and identifying it as the first step to empower them.

UNCTAD's surveys find that contract farming is rarely used in the Inle Lake area. Women's knowledge needs to be improved regarding production practises and product requirements and the potential increase in returns on their production. This is mainly because, under contract farming, farmers do not have to pay to intermediaries or get a stall in local markets, which most women do not have. Moreover, contract farming – especially through producer organizations or cooperatives – allows for selling in large quantities and gives a competitive advantage to women farmers in terms of setting prices. Central and local governments should create incentive programmes for contract farming with the support of development organizations in the area.

Online platforms and social media could also be used to facilitate farmers' access to market information and to establish links across economic sectors. Producer associations could act as facilitators to set up the platforms, train women on their use, and show them the potential the Internet and social media hold to improve their businesses. However, central and local governments should first invest in infrastructure for Internet accessibility to increase the share of the population with access to such platforms.

A point emerging from UNCTAD's farmer survey is that female farmers typically do not process their produce, or do so in a very rudimentary manner, adding little to no added value to their products in all three agricultural value chains under review (ginger, tea, and avocados). Moreover, the lack of capacity and tools to carry out even basic transformation processes results in overcrowding the market at harvest time. While development agencies have undertaken some initiatives in the tea sub-sector to modernize transformation processes and align them with hygiene and other standards, the same is not yet happening for ginger and avocado. Producer associations cited the shift to higher-value-added products and better access to market information as key areas of intervention needed to strengthen women farmers' businesses and establish linkages with the tourism sector. Central and local governments should partner with development organizations, NGOs and the private sector to develop policies toward this end. For example, they could provide subsidies and low-rate loans to farmers to buy advanced agricultural

equipment and tools, build shared processing and storage facilities, organize training programmes on new production technologies, and support producer organizations in forming business links with tourism enterprises and foreign buyers.

6.3. EXPAND MARKET ACCESS

None of the women farmers interviewed for UNCTAD's farmer survey sell their produce in foreign markets. This is not surprising considering that they are smallholders. In terms of the obstacles they face, limited production capacity was singled out as the main impediment, followed by inadequate financing mechanisms, insufficient support from export promotion agencies, and lack of internationally recognized certification. The associations surveyed by UNCTAD cited women's limited entrepreneurship skills, time poverty, lack of self-confidence and gender stereotypes as the most serious impediments to growing women's businesses and eventually reaching foreign markets. Targeted financing schemes for business growth, loans through export-import banks, capacity-building programmes on business management and product development, and society-wide initiatives to transform established gender stereotypes could be effective to address these impediments. Development agency and foreign aid funds could be channelled toward this end.

Besides direct measures to support the capacity of farmers to export, organic certification and certification of good agricultural practices would also be vehicles for reaching new markets. In a positive development, in January 2019 the Ministry of Agriculture, Livestock and Irrigation released Myanmar's standards for organic agriculture, which are fully harmonised with the ASEAN Standards for Organic Agriculture. The Ministry plans to issue certificates of organic production for all crops. Central and local governments should introduce measures to facilitate farmers' access to resources related to organic production, provide them with training on meeting the certification requirements, and establish mechanisms to build linkages between farmers in the area and potential markets for organic products.

Another possible way to expand markets for farmers in the three value chains is to link organic agriculture with community-based tourism and other forms of inclusive tourism. The 2012 Myanmar Responsible Tourism Policy and the follow-up 2013–2020 Myanmar

Tourism Master Plan could be used as a framework towards this goal. Existing projects on community-based tourism could be modified through advisory services, training for business development and subsidized business loans to incorporate direct links with agricultural production in the three value chains. Such projects could be introduced further in villages where there is potential for tourism development.

6.4. CREATE OPPORTUNITIES IN THE TOURISM SECTOR

The services sector employs around 10 per cent of the population in the townships under review, except for Taunggi and Hopong, where it reaches 40 per cent. Within services, wholesale and retail trade are the most important sectors for both men's and women's employment across the townships. The accommodation and food services sector, on the other hand, play a small role in both female and male employment.

Initiatives in the Inle Lake area such as that of Partnership for Change, which has offered training in the hospitality sector for disadvantaged groups, including women, have proven effective and could be replicated and broadened. The content of these training sessions was designed in cooperation with the tourism sector to ensure a good match between the skills acquired during the training and the needs of tourism outlets. The designation of Inle Lake by UNESCO as a Biosphere Reserve may boost economic development, encourage economic diversification and attract development funds, thus providing new opportunities for tourism sector development.

6.5. HELP WOMEN BENEFIT FROM STRENGTHENED LINKAGES BETWEEN THE AGRICULTURE AND TOURISM SECTORS

UNCTAD's surveys found that for the moment, supplying agricultural produce to tourism outlets seems like a farfetched option to farmers, and especially women farmers, in the Inle Lake area. Tourism outlets have a more positive perspective and consider sourcing from local women farmers a realistic option if farmers offer better prices and more reliable product delivery. NGOs, cooperatives and producer associations could act as intermediaries between women farmers and tourism outlets. They could support farmers' productive capacity to

meet the expectations of tourism outlets and link tourism enterprises directly to women farmers while sourcing agricultural produce. Cooperatives could also be instrumental in helping women farmers gain competitive advantage by pooling resources and selling in larger quantities to tourism enterprises. Women farmers could first sell their production, preferably high-value-added produce, to smaller-scale hotels (e.g. boutique hotels) and restaurants through the facilitating role of the associations. They could then reach bigger and more established tourism outlets with the help of support measures to meet certification or other contractual standards set by tourism enterprises.

Certain tourism models such as community-based tourism could provide the opportunity to create synergies between the agriculture and tourism sectors, as discussed above, and support the economic empowerment of women farmers. Community-based tourism enhances the value of the tourism experience by linking visits to tourist attractions with a stay on a farm. It creates positive spillover effects to rural communities, including women farmers, through market demand for handicrafts, cultural tourism products and services as well as agricultural products. Removing the legal obstacles to this tourism model should therefore be a priority of policymakers in Myanmar.

A survey by the ILO (2019a) shows that domestic tourists in Southern Shan enjoy food tasting and cooking classes, and would consider a visit to a tea farm during trekking as a favourable option. Several tourism activities could be developed based on these findings. For example, touristic services such as visits to ginger and avocado farms as well as tea farms could be developed. Recreational activities such as tasting and harvesting the produce, farm-related competitions such as identifying specific varieties, and educational activities related to such areas as nutrition and the medical benefits and alternative uses of various produce (e.g. ginger in the form powder, oil, etc.) could be considered as potential ways to develop community-based tourism in the area. Such initiatives would benefit women farmers to a great extent given the labour-intensive nature of these activities.

There are a number of ways to facilitate direct and indirect interactions, as depicted in figure 7 above, between women farmers in the three horticultural value chains and tourists visiting the Inle Lake region.

In order to promote direct farmer-tourist interaction and community-based tourism, government could encourage tourism companies such as hotels, resorts and tour operators to add local cultural excursions to nearby farms owned or run by women in the three horticultural value chains as supplementary services. Government, with the support of international development programmes and international organizations, could introduce pilot projects to provide subsidized loans for investments in on-farm guesthouses and boutique hotels with more favourable conditions for women farmers. Women farmers could be supported in developing high value-added products and supplementary recreational, educational and cultural services that could be sold to tourists during farm visits, farm stays and cultural festivals. Examples of such services include catering services, sightseeing tours, entertainment services (e.g. local dance and music shows, farm-related competitions such as identifying varieties of produce), educational offerings (e.g. on-farm cooking and nutrition classes, ethnic ceremonies) and recreational activities (e.g. on-farm harvesting and tasting sessions).

As a way of increasing the indirect interaction between women farmers and tourists, tourism companies such as large hotels, resorts and tour operators could incorporate new local products and services into their tourism service packages to support women farmers in the three horticultural value chains. Examples of such local products and services may include introducing local food sections into hotel menus and/or organizing local food night events while sourcing local produce including tea, avocado and ginger from women farmers in the area. Tourism companies could organize a weekend-long event such as “Celebrate the Inle Lake Cuisine and Culture” to attract both domestic and foreign tourists, and involve women farmers. They could provide locally-made complimentary gift packages for hotel guests which include products made from tea, avocado and ginger (e.g. avocado cream, ginger oil, green tea varieties) by women farmers in the region. Setting up small stores or sales stands at hotels and resorts in partnership with producer organizations and/or NGOs to display and sell products produced by women farmers in the three horticultural value chains could also be a promising path to link the agricultural and tourism sectors. Women farmers could also be supported to access local markets to sell their produce to tourism companies through measures such as free or subsidized stalls, childcare services and transportation

facilities. Pilot contract farming projects could be developed between women farmers in each value chain and hotels and restaurants in the region while providing the necessary inputs and training for quality assurance.

In order to promote demand for local produce by tourists, government could introduce labelling programmes such as “locally made by women of Inle Lake” which identifies local products produced by women farmers and “sourcing locally from women farmers” which positively distinguishes tourism companies that source locally and buy mainly from women farmers. In addition to labelling which could become a tool of advertisement, government with the support of international development programmes could provide financial incentives to tourism companies which shift their procurement practice to suppliers that source locally and mainly from women farmers.

In terms of the marketing channels, government authorities could liaise with large hotels and resorts in the Inle Lake region to help them develop farmer programmes. In such a programme, hotel managers and an extension officer funded by the hotel could work directly with women farmers in the three horticultural value chains to improve production, quality and marketing of their produce in return for guaranteed supply of fresh produce at competitive prices. This is not likely to result in a loss of revenues for women farmers as most of them currently sell their produce to intermediaries or processors. As a complimentary channel, government could introduce a marketing agency or initiative in charge of matching women farmers with tourism companies. The agency could provide the necessary inputs and tools to women farmers through a favourable loan programme and deliver extension services with the support of government agencies and NGOs for quality assurance. The COVID-19 pandemic has hit the tourism sector severely due to the strict limits imposed on international mobility through travel restrictions and social distancing measures. Domestic tourism, on the other hand, could help offset the losses from international tourism. In this regard, initiatives for community-based tourism such as those described above could stimulate local tourism and be consistent with social distancing measures, given their outdoors nature. The tourism sector hence needs to show flexibility and be innovative to adapt to the new circumstances.

6.6. IMPROVE WOMEN'S ACCESS TO FINANCE

Women in the Inle Lake area have limited access to formal financial institutions because they lack collateral such as land or business titles. Half of the women interviewed by UNCTAD stated that they are afraid to borrow money and prefer to run their businesses without borrowing. Those who borrowed mainly did so from family and friends. Access to finance is, however, critical for starting and/or expanding a business and moving it out of subsistence, and it is an area where gender gaps persist. There is need for targeted interventions to facilitate women farmers' access to finance and credit. Possible measures include simplifying application procedures, development banks offering subsidized and low-interest loans to women farmers, raising the ceiling of loans, offering a wide range of financial products to meet the specific needs of different groups of farmers, and providing targeted credit programmes organized by development agencies.

6.7. IMPLEMENT A GENDER-RESPONSIVE RECOVERY

The COVID-19 pandemic runs the risk of reversing decades-long progress toward gender equality around the world. Therefore, any policy response to the economic crisis resulting from the pandemic should incorporate a gender perspective. One major goal should be to retain women's productive participation in the labour force. In this regard, support measures should go beyond workers who hold formal employment and include informal, part-time and seasonal workers, categories that include many women in Myanmar. This is particularly necessary in female-dominated sectors such as the garment, hospitality, food and tourism sectors. While Myanmar's COVID-19 Economic Relief Plan extends health insurance benefits to workers who have lost their jobs, it does not do the same for those in informal employment. Benefits should go beyond health insurance and cover paid sick leave and maternity leave, pensions and unemployment benefits.

The pandemic will have a decisive impact on the survival of firms. CERP's rescue measures include soft loans for MSMEs. However, for women to benefit from the plan, more transparency and a simplification of procedures may be needed.

Innovative technologies such as mobile-phone-enabled solutions could expand access to basic financial services. Mobile money can offer women greater control over their financial lives by increasing their privacy and eliminating the safety concerns associated with managing and transporting cash. For female traders, mobile money can provide a solution for two challenges: limited alternatives to convert currency, and insufficient access to formal credit. However, access to mobile phones needs to be expanded in order for women to be able to take advantage of these opportunities.

Besides its impact on paid work, the pandemic has resulted in an increase in the unpaid work burden of women due to the forced quarantines and job losses. Public funds should be directed toward reducing the unpaid work burden of women. Public day care centres as well as programmes for children could be introduced and made accessible while meeting the health safety measures.

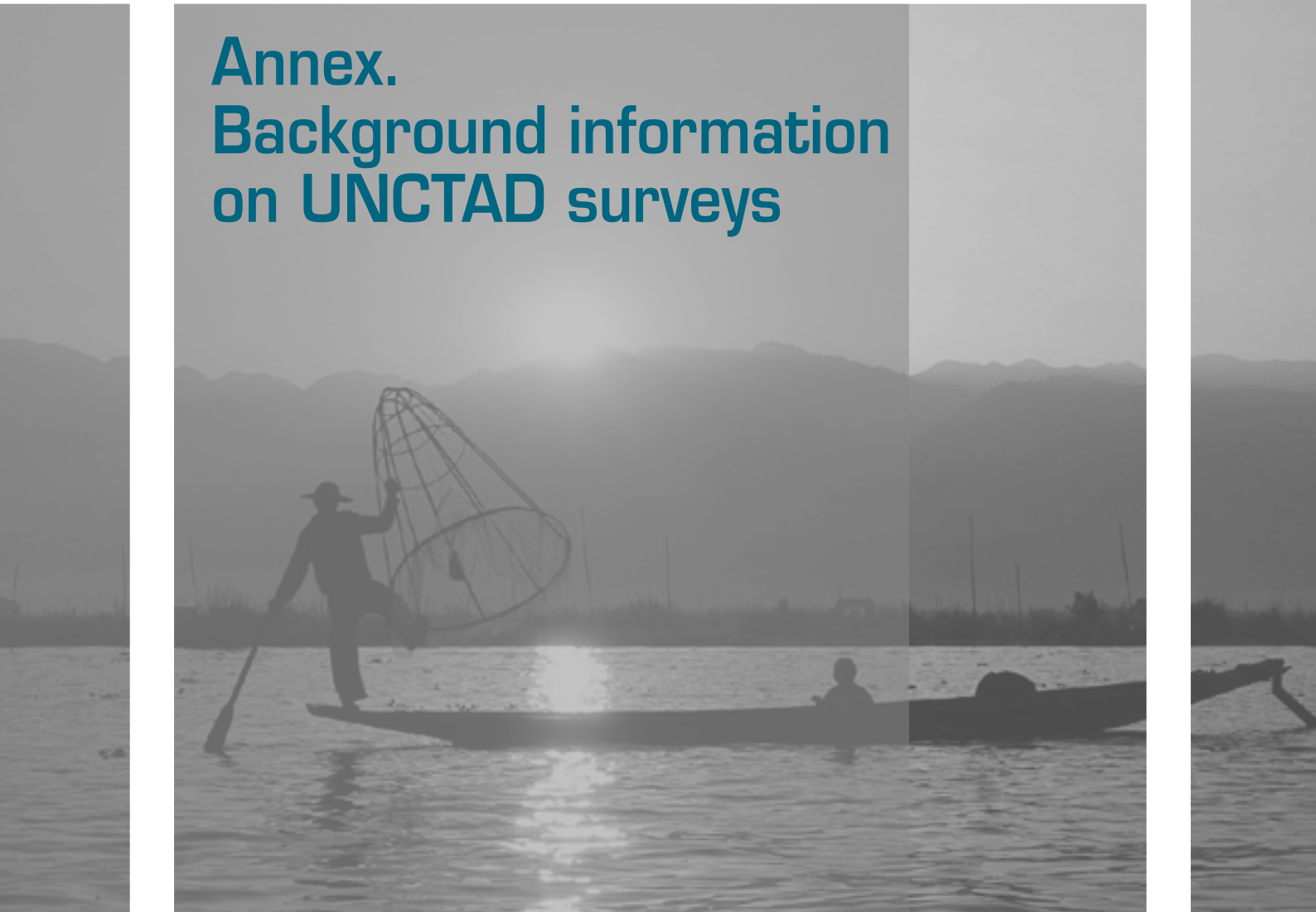
Women should be included in decision-making processes at all levels in the design and implementation of recovery policies. Greater representation of women would make it possible to incorporate their needs in a more direct and effective manner.

The pandemic and the resulting changes in economic life should be considered as an opportunity to introduce changes in certain economic sectors such as tourism. For example, measures to support the development of community-based tourism are likely to benefit women the most, given the female-intensive nature of such a tourism model.

In conclusion, as a longer-term goal, the development and modernization of the three agricultural value chains analysed in this study through the establishment of links with other sectors of the economy, such as tourism, has the potential to shift women's business from subsistence farming to commercial production, with positive outcomes for women, their communities, the Inle Lake area and the country as a whole. For this to happen, it is necessary for central and local governments to address the many shortcomings women face in the private and public spheres to unleash their potential, as identified in this study. Development agencies and local and international NGOs, including self-help groups, as well as producer associations, can be strong allies in efforts to reach these goals.



Annex. Background information on UNCTAD surveys



ANNEX. BACKGROUND INFORMATION ON UNCTAD SURVEYS

During the last quarter of 2019, UNCTAD administered three surveys in the Inle Lake area of Shan State in Myanmar. These surveys were administered to (i) female farmers involved in tea, ginger and avocado value chains (supply side); (2) buyers and employers in the tourism sector (demand side); and (3) local and international non-governmental organizations (NGOs) and development agencies working with women in the agriculture and tourism sectors, as well as farmers' associations.

While each survey was administered with different objectives, the results of the three surveys complement one another. The goal of the farmer survey was to identify the main shortcomings that women farmers face to source inputs, improve their productivity and reach the market. However, because agriculture is a family business in the Inle Lake area, most results from the survey are pertinent to both female and male farmers. The sample for the survey included 76 women farmers and covered seven townships, 37 villages and five ethnic groups.

The second survey, administered to buyers and employers in the tourism sector, aimed to obtain information from the demand side and identify potential pathways to link women farmers to the tourism sector. In other words, it investigated how the tourism sector could increasingly become an outlet for agricultural goods produced locally by female farmers. The survey also provided information about the employment characteristics and structure of the tourism sector in the Inle Lake area. A total of 20 businesspersons in five townships participated in the survey.

Finally, the third survey, administered to 24 local and international NGOs, development agencies and business associations in the agriculture and tourism sectors, aimed to identify specific activities and support initiatives made available to local farmers and local businesses, especially those that involve women. This third survey also facilitated administration of the other two surveys.⁴⁷

The surveys were administered by a local consultant in the Pindaya, Ywangan, Pinlaung, Kalaw, Pekon, Nyaung Shwe, Hopong townships and included respondents from all main local ethnic groups, namely Shan, Pa'O, Intha, Danu and Taung Yoe. The responses were entered in a data base and analysed by UNCTAD.

Survey of women farmers

UNCTAD collected responses from 76 women farmers engaged in the production of one or more of the crops under consideration, as detailed in table A1.

Table A1. Product profiles of women farmer respondents

Product	Tea	Ginger	Avocado
Number of respondents	41	47	51

Table A2 details the geographical distribution of the farmers participating in the survey.

Table A2. Residence of women farmer respondents

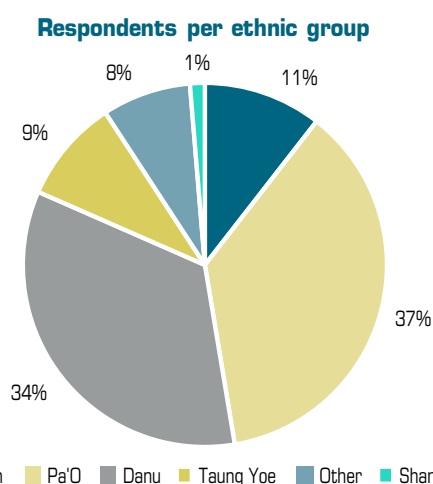
Pindaya	12	Pekon	6
Ywangan	11	Nyaung Shwe	7
Pinlaung	26	Hopong	10
Kalaw	4		

A typical respondent was a married woman working on a family farm, aged 35+ years, who had completed primary education. Most women farmers interviewed did not produce only tea, ginger or avocado, but were also involved in the production of fruits, vegetables or coffee for sale or for their own consumption.

All major ethnic groups except the Intha were represented in the survey, with the strongest participation by Pa'O and Danu women. A breakdown is presented in figure A1.

⁴⁷ The backing of the associations was crucial, especially for meeting farmers, as they generally only accepted participating in the surveys if asked by a trusted counterpart.

Figure A1. Shares by ethnic group of respondents to the survey of women farmers



Three-quarters of respondents spoke Burmese, mostly in combination with at least one local language. No farmer spoke English.

Survey of associations working with women

Respondents, denominated as “associations,” included heterogeneous entities such as women’s self-help groups, tourism associations, associations focusing on tea, ginger and avocado, research institutes, international and local NGOs, and development agencies operating in the Inle Lake area.

UNCTAD collected responses from 31 stakeholders operating in eight townships. The geographical distribution of respondents is presented in table A3.

Table A3. Number of associations implementing projects per township

Township	Associations
Taunggyi	15
Nyaung Shwe	18
Ywangan	6
Pindaya	8
Pinlaung	8
Pekon	6
Kalaw	5
Hopong	8

⁴⁸ Multiple answers were allowed.

⁴⁹ Multiple answers were allowed.

Respondents worked with all main ethnic groups in the area, namely Shan, Pa’O, Intha, Danu and Taung Yoe. Twenty-two respondents worked in at least one target value chain, including 14 in the tourism area, eight in tea, six in ginger and four in avocado.⁴⁸ The remaining respondents focused on horticulture, vegetables, or spices, or dealt with cross-cutting issues such as women’s empowerment and community development.

If working directly with women farmers, stakeholders reached a number of beneficiaries that varied from dozens to one thousand. When considering multiple value chains, this number rises significantly. The size of the entities involved in the survey is presented in table A4.

Table A4. Respondents to survey of associations, per number of employees

Number of employees	Associations
1-10	11
11-20	7
21-50	10
50+	3

Survey of buyers-employers in the tourism sector

The sample included 25 stakeholders: nine hotels, six restaurants, one tourist guide, one travel agency, five buyers (traders or processors), and three representatives of community-based tourism entities. Respondents by and large were people in charge of purchasing goods.

Table A5 presents the main products bought by tourism outlets directly from women.⁴⁹

Table A5. Number of respondents purchasing products from women producers and sellers

Product	Respondents
Tea	7
Tea products	21
Ginger	14
Ginger products	10
Avocado	16
Avocado products	1
None	0
Other	10

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