



Prototype Guide for Integrating **Gender** into Participatory Market Chain Approach

*Mayanja Sarah, Barone Silvia, McEwan Margaret, Thomas Bernet,
Amaya Nadezda, Terrillon Jacqueline, Velasco Claudio, Babini Claudia,
Thiele Graham, Prain Gordon, Devaux Andre.*



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This document presents strategic guidelines still under preparation. We encourage the use of the ideas presented here on the understanding that the source is recognized, and welcome comments to help us improve the exposed information. The ideas expressed here are the authors' alone and do not necessarily reflect the official position of the International Potato Center (CIP).

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We also value the support of the OFSP-AIS program, funded by ASARECA, through which, in 2012/2013, we began the effort of integrating gender into the Participatory Market Chain Approach (PMCA) in East Africa (Kenya, Tanzania, and Uganda). A similar undertaking by colleagues from Latin America started in April 2013, during an OFSP-AIS gender in business planning workshop, where CIP's researchers participated and initiated an intense collaboration to develop additional tools for mainstreaming gender in the PMCA, and to test and validate them in the Andean countries. The impetus for publishing this prototype guide came one year later, in April 2014 in Entebbe, when RTB and PIM co-funded a workshop to review CGIAR efforts of mainstreaming gender in value chains. At this workshop, CIP researchers discussed and approved the PMCA gender tools with key inputs and reflections from colleagues from Bioversity, CIAT and IITA.

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ABSTRACT

The Prototype guide for integrating gender into the Participatory Market Chain Approach seeks to build understanding on gender issues into value chain interventions and to create the capacities of PMCA's facilitators in applying gender analysis and developing gender-sensitive strategies to promote equitable opportunities for men and women to access to and benefit from the PMCA intervention.

This guide is a prototype document developed from lessons learned during field research and exchanges between CIP researchers and PMCA practitioners from East Africa and the Andes.

To develop a gender-sensitive PMCA, gender components were integrated into the PMCA's methodology in the form of specific tools that accompany the PMCA's phases of analysis and intervention. Two types of gender tools are presented in the guide: new gender tools nested into critical points of PMCA and a review of existing PMCA tools that have been made gender-sensitive.

The gender tools are meant to help users to consider critical gender issues, such as: an improved understanding of men's and women's division of roles and power positions in the value chain, a better identification of specific gender needs, an in-depth analysis of the opportunities and risks for men and women when new businesses are created, and the need of promoting gender-equitable market-driven solutions. Learning and capacity development of trainees are achieved through a sequence of training workshops developed along the three phases of PMCA and their skills are reinforced by backstopping activities.

The underlying concept is that value chain development interventions such as PMCA, when designed with gender-equitable principles, can foster both competitiveness and enhance poverty-reduction goals.

It is expected that PMCA facilitators who have been introduced to the gender analysis and gender tools presented in this guide will be able to design more gender-responsive, efficient and inclusive value chain interventions.

Chapter 1

Introduction: gender-sensitive training on PMCA application



Chapter I

Introduction: gender-sensitive training on PMCA application

Background introduction

The Participatory Market Chain Approach (PMCA) is a pro-poor value chain (VC) methodology aiming at stimulating market chain innovations that promote win-win relationships between market actors and smallholder farmers in order to facilitate their participation into the value chain. It was developed in 2005 by the International Potato Center (CIP) with the experience gained in the Andes. This methodology has been applied to several VCs during the last ten years including East Africa and Asia, and has proved to be a powerful approach to fostering market-driven innovations and facilitating smallholder inclusion.

Two methodological support tools related to the PMCA approach have been developed:

- The PMCA User's Guide (2012), which supports PMCA implementations guided by facilitators and the institution leading the process (available in English and Spanish);
- A Trainer's Guide, which provides strategic guidance to trainers who are building capacity of PMCA facilitators (available only in Spanish)

Both guides have been applied and validated in the Andes, East Africa and South West Asia. Based on the applications of the PMCA in East Africa (between 2011 and 2013), CIP researchers and partners identified a major methodological gap in considering gender issues among VC actors, and therefore the need to make the methodology more gender sensitive. Indeed, the existing guides lack an adequate focus, as well as practical instruments on how to analyze and address constraints faced by different value chain actors (men, women, young men, young women), which, in turn, limit the PMCA's effectiveness to ensure more equitable access to opportunities and benefits

generated along the chain. These limitations would consequently impair the goal of helping reduce gender inequalities of the beneficiaries of the intervention and they would potentially affect value chain performance.

To address this gap, CIP colleagues in Africa and Latin America have developed, tested and/or adapted several gender-analytical tools to complement the PMCA methodology and make it gender responsive. This experience gave rise to an ongoing South-South knowledge sharing and learning process between Africa and Latin America regions related to methods and tools that aim at improving the link between small-holders and markets.

The process has been supported by the CGIAR Research Program (CRP) on Roots Tubers and Bananas (RTB) and the CRP on Policy Institutions and Markets (PIM). Based on this experience and on the previous guides, this document proposes a systematic strategy to incorporate gender tools into the PMCA and to assist trainers in the development of PMCA facilitators' capacities for the application of the gender tools.

Arguments for integrating a gender perspective into PMCA

A number of arguments have been put forward to emphasize the importance of a gender perspective and of gender-sensitive analytical tools for value chain analysis, such as:

- (i) Social justice: human rights translate differently for men and women.
- (ii) Poverty reduction: fighting poverty is hard if you are gender blind.
- (iii) Economic consideration: gender inequity is a missed business opportunity (KIT, AgriProfocus & IIRR, 2013).

Chakrabati (2013) argues from a broader perspective that: "Only when gender equality is assured, economies can make use of society's potential talent as well as encourage innovations that create wealth". Consequently, the current guide stresses the importance of applying a gender perspective, supported by specific gender tools, to PMCA implementations and trainings.

What are the expected changes introduced by this guide?

It is expected that PMCA facilitators, who have been introduced to gender analysis and planning tools presented in this guide will have skills to design more gender-responsive, efficient and inclusive value chain interventions that meet both men's and women's needs and interests¹, and to adjust the methodology according to the specificities of the context and of the value chain's actors involved.

How to use this trainer guide: Important points before starting

This document is a prototype guide for integrating gender into PMCA; it is complementary to the existing PMCA User's and Trainer's Guides. It reflects the structure of the existing Trainer's Guide (Spanish version) and presents a sequence of four training workshops for PMCA capacity building where, gender analysis and tools are introduced in each phase of PMCA. This guide intends to be a support document for PMCA trainers as well as for PMCA facilitators during the implementation. It provides gender tools and new insights from field practice. The guide will be validated through field applications in different contexts, and the tools will undergo a series of field trials during 2016-2017 in Africa and Latin America.

What this guide can do

- Introduce key concepts on gender and value chain: why, how and when to introduce gender in VC analysis and intervention.
- Introduce and integrate gender analysis and perspective into the PMCA capacity-building process, specifically considering the PMCA training workshops described in the previous PMCA Trainer's Guide and outlined in this guide.
- Describe how to incorporate gender concerns throughout the three phases of PMCA, by using gender analysis, planning and evaluation tools or existing PMCA tools with a gender lens, and provide illustrative examples of how to use those tools.
- Identify check points of each PMCA phase for helping trainers in their backstopping activities, ensuring that gender concerns are effectively incorporated.

What this guide cannot do

- Provide a detailed full conceptual and illustrative description of the PMCA methodology and training process, which is described in the PMCA User's Guide and in the Spanish version of the PMCA Trainer's Guide.
- Prescribe which, among the different gender tools proposed, are the most appropriate for particular VC settings.
- Provide a detailed description of the pros and cons of various gender tools.
- Create full expertise in gender analysis and planning.

Learning objectives of the Prototype Guide for Integrating Gender into PMCA

The objective of this guide is to help PMCA trainers effectively teach PMCA facilitators how to incorporate a gender perspective and use specific gender tools during a PMCA application. The gender capacity-building process follows the sequence of workshops and backstopping activities as requested in the PMCA training process. Trainers should work to achieve results at three levels: knowledge, skills and attitudes, as shown in the following scheme.

EXPECTED LEARNING ACHIEVEMENTS	
PMCA TRAINING	GENDER-SENSITIVE PMCA TRAINING
Knowledge of critical aspects of PMCA theory and practice	Knowledge and understanding general gender concepts and their implications
Skills needed for an efficient PMCA planning, facilitation and monitoring	Skills needed for facilitating and applying gender analysis and evaluation tools
Attitudes of the potential PMCA facilitators (interests and perceptions about the PMCA, attitude towards value chain actors, and ways of working and approaching problems).	Shift in attitudes that stimulate awareness and interest on gender issues and commitment to address them.

What are the PMCA phases and the corresponding gender tools to be used?

The PMCA methodology comprises three phases:

- **Phase 1. Rapid market chain assessment and identification of innovation opportunities.** In this phase a Research and Development (R&D) organization (such as NGO, research institution, etc.) initiates the PMCA process by selecting the market chain to work on, identifying potential partners and carrying out exploratory market chain appraisal. Phase I ends with a final public event, where market chain actors (farmers, traders, processors, and market agents), meet the PMCA leading institution that presents the results of the market chain appraisal and shares actors' different expectations, constraints and capabilities, and facilitates discussion on possible innovations.
- **Phase 2. Analysis, selection and prototype development of identified opportunities.** During phase 2, the R&D organization establishes thematic groups, which focus on a particular innovation opportunity in the commodity value chain and facilitates meetings. These meetings are designed to: i) foster mutual trust and knowledge-sharing among participants, ii) to deepen the analysis of the potential market chain innovations, and iii) to pilot the development of the selected innovation (business plan and prototype development). Likewise the first phase, this second also ends with a final event where each thematic group presents their progress, common objectives and the activities realized to fully develop market chain innovations. During this phase, the group and the facilitator will meet and engage with other actors in the process of innovation.
- **Phase 3. Launch of innovation.** In this last phase the market chain actors collaborate for practical innovation processes with the support of the R&D organization. This phase focuses on the activities needed to launch specific innovations and may take from three to six months. It closes with a large final event in which the innovations are launched to a wider group including donors, politicians and investors.

In each of these phases, the PMCA implies the application of specific tools for analysis and for decision-making purposes. This gender guide proposes the inclusion of a gender perspective through two approaches:

- By introducing gender analysis, planning and evaluation tools.
- By incorporating a gender focus to the existing PMCA tools.

The following table presents new or existing PMCA tools, classified by their level of gender and the corresponding phase of PMCA where they should be used.

PMCA PHASES AND CORRESPONDING GENDER TOOLS				
	New PMCA Gender Tools		Existing PMCA tools	
	Name	Level of gender	Name	Level of gender
Phase 1 Assessment and opportunity identification	<ul style="list-style-type: none"> Gender Organizational Assessment of Partner Organization (tool 2) 	significant	<ul style="list-style-type: none"> SWOT analysis (see box C9 page 38, User's Guide) 	none
	<ul style="list-style-type: none"> Gender-Sensitive Value Chain Mapping (tool 3) 	significant	<ul style="list-style-type: none"> Gender-Sensitive Impact Filter (tool1)² Qualitative Assessment of the Market Chain (pg. 41, and pg. 139 Trainer's Guide) 	significant
Phase 2 Analysis and development of opportunities	<ul style="list-style-type: none"> Gender-Based Constraint Analysis and Planning (tool 4) 	significant	<ul style="list-style-type: none"> Focus Groups (tool5 User's Guide) 	some
			<ul style="list-style-type: none"> Rapid Market Appraisal (tool3 User's Guide) 	none
			<ul style="list-style-type: none"> Quantitative Market Study (tool4 User's Guide) 	none
			<ul style="list-style-type: none"> Business Plan and Cost-Benefit Analysis (tool 7 User's Guide) 	none
Phase 3 Launch of innovation	<ul style="list-style-type: none"> Gender Risk-Benefit Analysis (tool5) 	significant	<ul style="list-style-type: none"> Marketing Concept Development (tool 6 User's Guide) 	none

Table1. PMCA phases and corresponding gender tools: new gender tools developed for each one of the PMCA phases (left), and existing PMCA tools made gender-sensitive (right column).
 Note: the level of gender-responsiveness in all tools has been categorized according to three levels: none, some and significant.

2. The impact filter tool was already present in the User's guide but had no gender focus in it.

The gender tools for PMCA:

Five gender tools for analysis and planning are introduced in this guide. These tools will be introduced throughout the PMCA training workshops presented in the next chapter. The tools are:

Tool 1: Gender-Sensitive Impact Filter

The Impact Filter tool is part of the PMCA User Guide (tool 1 of User's guide) and has been revised to incorporate a gender perspective. The Gender-Sensitive Impact Filter is used in PMCA Phase I and provides a rapid qualitative evaluation of the expected impacts that different market opportunities are likely to have on poverty, society and environment. The Gender-Sensitive Impact Filter tool looks at possible impacts of market opportunities on: i) potential to involve women in market chain activities and in decision-making and ii) potential effect on women's and men's income-generating opportunities, access to resources, and capacity building. This tool will help to focus on those potential innovations that are most likely to produce the desired development impacts, including on women's economic empowerment, while not exerting a negative impact on the most vulnerable actors.

Tool 2: Gender Organizational Assessment of Partner Organization

This tool consists of a survey questionnaire that aims at collecting and analyzing the perspective of public and private institutions and stakeholders that influences or supports the PMCA intervention. The analysis focuses on understanding both:

- i) the gender awareness and knowledge of the gender context (gender norms and rules)
- ii) the gender responsiveness of the institutions (i.e. whether they have built-in mechanisms to ensure gender balance within the organization and to carry out interventions aimed at improving gender equality).

After conducting the interviews, the PMCA facilitator can decide whether the interviewed organization can be a potential partner in ensuring that identified gender-based constraints are addressed and to what extent it may need some capacity building in gender mainstreaming. This tool is used at the beginning of PMCA Phase I, along with the Qualitative Assessment of Market Chain (see Trainer's Guide), and it provides useful information on the market chain context to feed into the Gender-Sensitive Value Chain Mapping (tool 3).

Tool 3: Gender-Sensitive Value Chain Mapping

This tool enables users to capture information on the roles and the power position of male and female actors along the market chain and reveals existing gender issues that may impede market chain development. The Gender-Sensitive Value Chain Mapping gives insights on what actions or strategies can support the development of gender-responsive innovations. It is used during Phase 1, prior to the first event, within the R&D organization facilitating the PMCA. Linked to the use of the Gender-Sensitive Impact Filter (tool1), it fosters reflections on gender issues along the chain in a systemic way. The tool can also be used during the Final Event of phase 1, together with the invited actors, to analyze and discuss more explicitly the gender constraints into the identified (commercial) innovations.

Tool 4: Gender-Based Constraints Analysis and Planning

This tool is complementary to the Gender-Sensitive Value Chain Mapping tool (tool3), and allows a deeper understanding and identification of gender-based constraints and strategies to address them. It provides insights into gender roles and activities along the different nodes of the value chain, while also identifying the constraints faced by these actors in accessing resources and services needed to carry out their activities. Moreover it facilitates an analysis of the identified gender-based constraints by looking at their consequences, both for the actors and for the sector as a whole, making it possible to prioritize the most crucial constraints to be addressed. This tool is best used in phase 2, after that a market opportunity has been selected by the thematic group. It can be first used by facilitators and then validated in a participatory way with thematic group members. Information collected through the Gender-Based Constraint Analysis and Planning tool can be useful to be integrated into the Business Plan (tool7 User's Guide)

Tool 5: Risk and Benefit Analysis

The Gender Risk-Benefit Analysis is a useful participatory assessment tool to quickly evaluate the effect that implementing a business opportunity has on female and male chain actors considering relevant dimensions such as amount of work, income, social position and/or market position. The tool helps to ensure that business opportunities do not exert a negative effect on either female or male chain actors. It is used during Phase 2 and 3 with thematic groups.

What capacity development challenges are likely?

Sharing the theoretical and practical knowledge needed to enable new PMCA facilitators to use the methodology in a new context can be a difficult task. Besides deep methodological insights, in many cases attitude changes are needed from the facilitators in order to interact with the variety of market chain actors involved in the intervention. At the same time, new insights need to be converted into practical skills for facilitating the PMCA process and applying the different tools.

These challenges become more complex when a PMCA trainer is not available in the location where the PMCA is being applied, and that some training and backstopping need to be provided through emails, skype or telephone in addition to face-to-face meeting. This implies that the PMCA trainer must be flexible enough to adapt the training modules to a new context, considering the characteristics of the value chains in which the PMCA is applied, as well as the level of knowledge and experience of the facilitators and their training needs.

How are the capacity-development challenges going to be faced?

The capacity-building strategy for PMCA aims to respond to this complexity through the use of four sequenced training workshops and corresponding backstopping activities integrated into the three structured phases of a PMCA application. Linking the PMCA capacity-building process with implementation of the method will allow the PMCA facilitators to gain relevant capacities stepwise, when they implement the method and to benefit from an iterative process that allows them to put into practice what they have learned, and bring back experiences in the next workshop.

The PMCA capacity-building strategy involves both:

- (a) training workshops
- (b) backstopping activities

In general, the training workshops aim at broadening the theoretical and practical knowledge related to the PMCA. Figure 1 illustrates the sequences of the workshops and their main objectives to build the capacities needed to implement a PMCA. On the other hand, complementary backstopping activities aim at providing practical assistance to improve the work and address challenges faced by the facilitators during PMCA applications. Figure 2 shows the suggested time frame for the capacity-building activities.

Workshop sequence to build PMCA capacities

Workshop participants

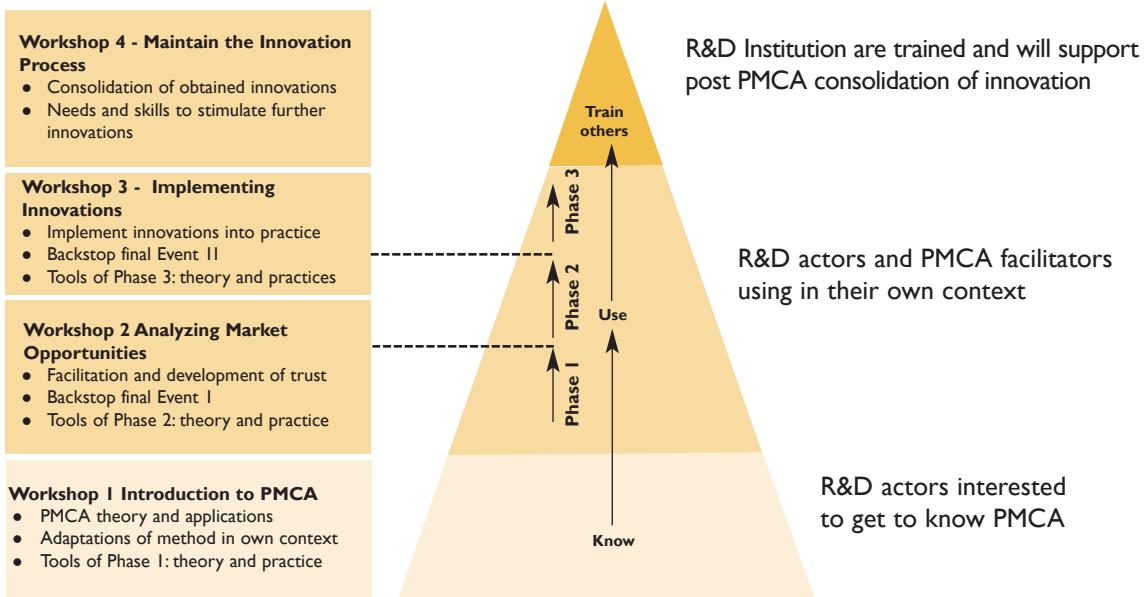


Figure 1. Diagram structure to build PMCA capacities: capacity building workshop (left boxes) objectives and main contents, in relation to the learning and skills acquisition (triangle-center) and the type or participants expected in each of the step of capacity building (right)

PMCA Capacity Building Process

PMCA Applications

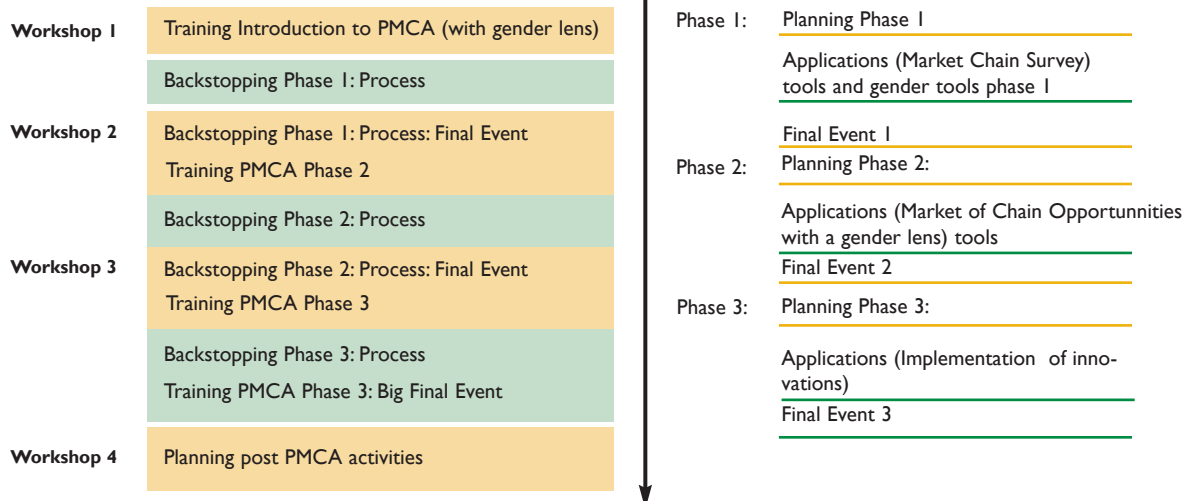


Figure 2. Time linkages between PMCA capacity building process and PMCA applications

Chapter II

Training workshops and backstopping activities



Note before starting: how to use the different PMCA Manuals to complement information needed for training. When developing the workshop, the PMCA trainer will use this prototype guide to design the structure of the workshop, both session contents and agenda, and to introduce the gender analysis and tools. He/she will use the existing Trainer Guide for the general development of the training session and content, and she/he will make reference to the User's Guide when presenting tools already developed in that document.

Workshop I

Introduction to PMCA: market chain assessment and opportunity identification

Training PMCA Phase I

Context:	One or more R&D organizations and potential PMCA facilitators involved in supporting the value chain development are interested in getting to know the PMCA, having in mind that the method, its concepts and tools might be useful for them.
Participants:	Different R&D actors and especially technical staff of the organization(s) that will lead the PMCA application. Other actors might want to join the workshop, including donors and policy makers.
Workshop Objectives:	By the end of the training, trainees will be able to: <ol style="list-style-type: none">1 Understand the basic goals and principles of the PMCA, and their roles as PMCA facilitators.2 Assess the potential value of the PMCA for their organizations and the value chains they want to work on.3 Understand the importance of integrating gender in value chain analysis; knowledge and practice of gender tool for phase I.4 Better understand how to approach market chain actors by using a structured process that aims at creating trust and tangible innovations.

- 5 Plan and conduct PMCA Phase I. Plans should include reporting and communication timeline and norms/procedure to ensure appropriate backstopping from the trainer.

Workshop Content:

- Presentation of PMCA theory and practice, showing practical applications and case studies.
- Presentation about why is it important to integrate gender when working on and analyzing value chains (see annex 6, online presentation available).
- Gender skit (see Annex 6).
- Participants' evaluation of PMCA within their own market chain contexts.
- PMCA Phase I and its tools, including gender tools, with practical application, if possible. These tools include: Gender-Sensitive Impact filter (tool1), Gender Organizational Assessment of Partner Organization (tool 2), Gender-Sensitive Value Chain Mapping (tool3) and Qualitative Assessment of Market Chain (trainer's guide).

Suggested Duration: Four days, including a field visit during Day 3

Backstopping PMCA Phase I

Context:

One or more R&D organizations decide to apply PMCA in one or more value chains. In the process of planning and implementing Phase I, in particular the Qualitative Market Survey and the Final Event, they request technical backstopping to supplement the information found in the PMCA User's Guide.

Clients:	Technical staff of R&D organizations directly facilitating the PMCA.
Backstopping Objectives:	<p>With Phase I backstopping, facilitators will have more confidence to:</p> <ol style="list-style-type: none"> 1 Apply PMCA Phase I in a credible manner in line with concepts and principles and adapted to a specific context. 2 Keep PMCA trainers informed about the application of Phase I progress. 3 Give advice and correct possible mistakes identified during the application.
Check Points³ during PMCA Phase I:	<ol style="list-style-type: none"> a Select the promising market chains and geographical areas to apply PMCA. This is done through the use of the Gender-Sensitive Impact Filter (tool 1). b Revise the list of different market chain actors to be interviewed, taking into account gender balance in interviewees and in the team of interviewers. c Ensure the integration of gender issues in PMCA Phase I, by applying the following gender tools: Gender Organizational Assessment of Partner Organization (tool 2), Gender-Sensitive Value Chain Mapping (tool 3) and the Qualitative Market Survey (see Trainer's Guide). Backstopping the application of gender tools could be outsourced if PMCA trainer sees the need. d Analyze the survey results and summarize them in a matrix form. Analyze results of gender tool application in Phase I and integrate

3. A check point is used to check progress on the critical activities needed to complete each phase of the PMCA application. See also section on PMCA Phase I in the User Guide

them with the Qualitative Market Survey results.

- e Identify the subject of the thematic groups for the final event (taking into account gender interest of interviewed actors).
- f Practice the application of the Gender-Sensitive VC Mapping (tool3) with facilitators, before the final event where the tool will be applied, as a participatory exercise.
- g Plan the Agenda for the final event.
- h Prepare presentation of the Qualitative Market Survey findings (Trainer's Guide).
- i Prepare the script of the Market Chain Sketch (if used at the final event) including a gender perspective by using results of the Gender-Sensitive VC Mapping (tool3).

Note for implementation of the training events.

For practical reasons, it is possible that the trainer and facilitator(s) meet together for backstopping the activities related to the final event (check points (d) to (i)) just before the final event I. This would permit the PMCA trainer to be physically available and also to participate in the final event and to better understand the context where PMCA is applied. The training workshop for phase 2 could be done immediately after the final event of phase I to optimize the logistic of capacity building activities.

Suggested Structure of Workshop I Sessions:

Day I

- Session 1:** Introduction to the workshop, including presentation of participants and trainers.
- Session 2:** Presentation and discussion of PMCA theory and practice (use of case studies).
- Session 3:** Presentation and discussion of gender in value chains (use skits on gender roles and their implications, and presentation on rationale for incorporating gender into value chain intervention and PMCA, see annex 6).
- Session 4:** Assignment 1 - group work: SWOT analysis of specific market chains and evaluation of PMCA (User's Guide pg.38).

Day 2

- Session 5:** Presentation of the suggested tools of PMCA Phase I: Gender-Sensitive Impact Filter (tool 1), Gender Organizational Assessment of Partner Organization (tool 2), Qualitative Market Survey (see Trainer's Guide), Gender-Sensitive Value Chain Mapping (tool 3).

Day 3 (Field trip)

- Session 6:** Preparation of field visit, for testing the qualitative interviews that will be used in the Qualitative Market Survey (see Trainer's Guide).

Day 4

- Session 7:** Presentation of the experience and lessons learned from the field visit.
- Session 8:** Assignment 2 - group work: Assessment of PMCA's use in specific chains and planning of PMCA Phase I.
- Session 9:** Final discussion: challenges when using PMCA, next steps, workshop evaluation.

Note: Given the time constraints of R&D organization and staff participating to training, the workshop is designed such that key people participate at least during the first morning, when the method is presented and in the final session, when participants share their conclusions about PMCA and the steps they've planned to move on with implementation. It may be necessary to bring in expertise for gender in value chains sessions, if the PMCA trainer(s) do not have the skills.

Workshop I - Agenda

Day I Introduction to PMCA

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop: objectives and workshop program	Representative of R&D organization
8.50-11.30	Context introduction: project and need for market chain interventions using the Participatory Market Chain Approach (PMCA)	PMCA Trainer
11.30-12.00	Brief discussion on PMCA and its applications	PMCA Trainer and trainees ⁴
12.00-13.30	Lunch	
13.30-13.45	Video on PMCA applications in Peru	PMCA Trainer
13.45-14.00	Introduction to SWOT and group work [Assignment I]	PMCA Trainer
14.00-15.30	SWOT Analysis Part I: Assess two or three market chain options, that are potentially available and of interest	PMCA Trainer and working groups of trainees
15.30-15.50	Coffee Break (integrated into the group works)	
15.50-16.30	SWOT Analysis Part II: Assess potential impact of PMCA on SWOT findings	PMCA Trainer

Day 2 Introduction to gender in PMCA

Time	Item	Responsible person
8.30-9.00	Presentation of the SWOT Analysis results by working groups. Feedback from PMCA trainer	Representatives of each working groups PMCA Trainer

4. The trainees include future PMCA facilitators and other staff of R&D organization interested in getting to know the PMCA methodology.

9.00-10.30	Introduction to Gender in Value Chains: gender roles and their implications (anexe 6)	Gender in value chains expert ⁵ or the PMCA trainer
10.30 - 11.00	Coffee Break	
11.00 - 12.00	Rationale for mainstreaming gender in VC (anexe 6)	Gender in value chains expert or the PMCA trainer
12.00-13.00	Group work: making the SWOT analysis gender-sensitive	Trainees in working groups
13.00-14.00	Lunch	
14.00-15.30	Introduction to gender in value chain analysis tools: Gender Organizational Assessment of Partner Organization (tool 2); Gender-Sensitive Value Chain Mapping (tool 3)	Gender in value chains expert or the PMCA trainer
15.30- 16.00	Tea Break	
16.00 0- 17.00	Groups work: Gender-Sensitive Value Chain Mapping	Trainees in working groups

Day 3 Field Trip

Time	Item	Responsible person
8.30 - 9.00	PMCA Phase I in practice	PMCA trainer and gender expert
9.00 - 10.30	Preparation for field work: preparing field questionnaire and simulation of PMCA Phase I Qualitative Market Survey	PMCA trainer and trainees in working groups
10.30 -11.00	Tea Break	
11.00-16.00	Travel to field, field work	Trainees
16.00-17.00	Return from field, break	Trainees
17.00-18.00	Review and prepare results from the field	Trainees

5. In case the PMCA trainer is not confident with his/her gender knowledge and experience, a gender expert may be requires to develop gender session of PMCA.

Day 4 Planning PMCA phase I

Time	Item	Responsible person
8.30-8.40	Recapitulate previous days, and presentation of the objectives of the day	PMCA trainer
8.40-9.40	Reports of field visit and interviews from the working groups: findings and lessons learned (including potential of PMCA for specific sector and main gender-based constraints)	Representatives of each working group
9.40-10.10	Discussion and feedback from PMCA consultants using PMCA	PMCA Trainer and gender expert
10.10-10.30	Coffee Break	Trainees in working groups
10.30-12.00	Group work: [Assignment 2] PMCA Evaluation and Planning - Reasons for applying PMCA to trigger market chain innovations - How to create an enabling condition for gender sensitive PMCA applications - Develop an action for plan PMCA application	
12.00-13.30	Lunch	
13.30 - 14.15	Reports from group work	Representatives of each working group
14.15 - 15.15	Feedback from PMCA trainer and plenary discussion	PMCA trainer and trainees
15.15-15.45	Coffee Break	
15.45 - 16.30	Conclusions, workshop evaluation and way forward Workshop closure	PMCA trainer, trainees Representative of R&D organization

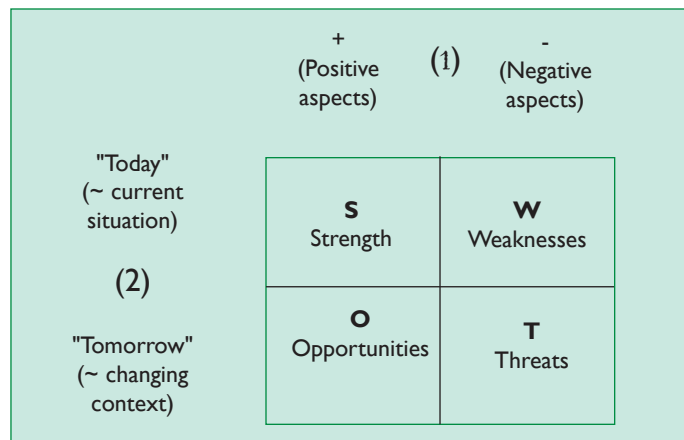
Assignment I: Group Work - SWOT Analysis

Background SWOT Analysis

The SWOT Analysis is a qualitative evaluation tool that can be used to assess products, projects, persons, methods, etc. This evaluation method is based on the perception of the evaluators regarding the following four aspects:

S = Strengths
W = Weaknesses
O = Opportunities
T = Threats

These four aspects are analyzed in the context of four quadrants based on two axes: (1) positive versus negative aspects and (2) current versus future situation (see figure).



Task for the Group Work

Part I

- To assess the strengths (S), weaknesses (W), opportunities (O), and threats (T) of the sub-

sector (different value chains can be considered), the group discusses what the (current) strengths and weaknesses of the subsector are, and what the potential (future) opportunities and threats that are likely to be faced are, with a focus on the potential implications for men and women actors.

For each issue a card (white color) is written that summarizes the idea, which is then placed on the wall according to the figure shown above.

Part II

- To discuss what advantages and disadvantages PMCA seems to have when potentially used in the assessed subsector.

Green cards are added to the prepared SWOT matrix indicating where and how PMCA might help to capitalize on strengths and opportunities, respectively, to remove bottlenecks and threats.

Yellow cards are added to the prepared SWOT matrix indicating where and how PMCA would not be of help to improve the situation

Tool 1: Gender-Sensitive Impact Filter

Devaux A., Barone S., Velasco C., Amaya N., Bernet T.

Overview:

Who: PMCA Facilitators, actors who know the sector well, thematic groups

When: Phases 1 & 2

Preparation: 1/2 day

Category: Qualitative analysis/ group work

Duration: 1 day

Brief description:

The Gender-Sensitive Impact Filter tool provides a rapid qualitative evaluation of the expected impacts that different market opportunities are likely to have on poverty, social and environmental objectives. This tool is already part of the PMCA User Guide (tool 1 of the Users' Guide) and has been revised to make it gender sensitive. It is therefore not a new tool, but a revised Impact Filter tool.

Purpose:

This tool enables R&D organizations to plan and guide interventions more effectively by providing inputs to inform the selection of market opportunities with the most beneficial impact possible. It explicitly takes into account the following dimensions of impact:

- Economic: poverty reduction, income risk and women's economic empowerment.
- Social: empowerment of poor/most vulnerable actors (e.g. women, and youth).
- Environmental-natural: resource management.

It is a rapid, ex-ante qualitative assessment tool that can be applied as a participatory process. In

this case, actors with different professional backgrounds and experiences would jointly evaluate the potential impacts of different market opportunities.

Use in PMCA:

When used as part of the PMCA methodology, the Gender-Sensitive Impact Filter allows the R&D organization to make strategic decisions. It provides the organization with information to compare different market opportunities in terms of the potential impacts with regard to the different impact dimensions. It is important to consider those dimensions with a gender lens, given that both women and men play important roles within value chains but do not have equal access to resources and benefits. It is also essential to understand these different roles and address those inequalities in order to achieve overall project objectives and avoid perpetuating discrimination.

In the context of the PMCA, this tool is used at the end of Phase 1, once the different market opportunities have been identified, to help define the thematic groups; or in Phase 2 as part of the thematic group discussions. This tool will help focus on those potential innovations that are most likely to produce the desired development impacts and not exert any negative impact on the most vulnerable development actors, including women.

Step 1: developing a simple chart to characterize market opportunities

The first step is to characterize the different market opportunities identified according to selected common qualitative criteria (e.g. market size; target population, by sex; production zones, etc.). Then, with this information a matrix is prepared (see Table I/tool I).

Market opportunity	Production zone	Type of producer potentially involved	Proportion (%) of female producers or female business owners	Principal markets	Principal markets
Market opportunity 1		e.g. large, medium and small scale	e.g. 40% male 60 % female		
Market opportunity 2					
Market opportunity 3					

Table 1/ tool 1: Example of matrix for characterizing different market opportunities by common criteria

Step 2: defining development objectives

To compare the expected impacts of the selected market opportunities in detail, a more complete chart is developed by R&D organizations (see Table 2/ tool 1). First, the development objectives of the project should be identified with a gender perspective: these are usually defined in project documents and consider normally economic, social and environmental impacts. When the gender dimension is not included, it will be important to consider gender balance and gender equity as intrinsic goals in all the development objectives. Table 2/tool 1 is used to evaluate how the market opportunities should help achieve the targeted development objectives. The finer grained analysis of impacts is conducted by defining sub-criteria to each of the three general objectives or impact dimensions (economic, social, and environmental). Impacts with regard to gender equality and women's economic empowerment should be included in all the three dimensions (see Table 2/tool 1).

Step 3: weighting of general and specific objectives

To ensure that each overall objective and its sub-criteria are assigned to the correct level of importance, the criteria are weighted by PMCA facilitators and implementers in two steps (see Table 2/

tool). First, each general objective (e.g. poverty alleviation, empowerment of women and the poor, etc.) should be weighted. Then, each sub-criterion is weighted. The relative importance of each sub-criterion is defined by assigning a percentage representing its respective importance or "weight" (the total should add up to 100%).

Step 4: rating different market opportunities

To determine which market opportunity would contribute best to the development objectives, each market opportunity is evaluated per sub-criterion (Table 2/ tool1). Thus, each sub-criterion is rated by assigning to it a number ranging from 1 to 10 using the following approximate scale:

1 = "impact is very negative"

5 = "impact is neutral"

10 = "impact is very positive".

The process used to obtain this rating may vary from case to case, depending on whether this tool is used in a participatory setting or not (see Box below).

Designing the evaluation process

A potential impact can be evaluated in different ways. One way is to evaluate it by working in a small team made up of people who know the sector well, in terms of both production and the market. Such an assessment could be done by the team jointly or individually. If done individually, average values would be derived from individual assessments.

Another way is to undertake the evaluation within a bigger group, as part of a participatory process where different experts and point of views of market chain actors are represented and involved. In this case, however, it will be important to consider the fact that personal, institutional and commercial interests may distort the process.

do not have the skills.

Step 5: calculating potential impact

For each market opportunity, values are calculated for each sub-criterion by multiplying $A \times B \times C$ where:

A = Weighting factor of general objective (%)

B = Weighting factor of sub-criterion (%)

C = Rating of impact at the sub-criterion level (value 1 to 10)

$D = A \times B \times C$ = result of evaluation of each sub-criteria

To compare the overall expected impact across market opportunities, the coefficients calculated for each sub-criterion (i.e. all value D) are added up for each case (see Table 2/tool 1, example of chart to evaluate different market opportunities with a gender lens).

Table 2/ tool1 Impact dimensions and Sub-criteria		Rating of impact at the sub-criterion level (between 1 & 10 [1] /weighted results)				Potential impact $D_i = (A_i \times B_i \times C_i)$		
Impact dimensions and Sub-criteria	Weighting factor	Market Opportunity 1	Market Opportunity 2	Market Opportunity 3	Market Opport. 1	Market Opport. 2	Market Opport. 3	
1. ECONOMIC IMPACT AND POVERTY ALLEVIATION	(A1): 40%							
1.1 Potential to increase incomes for stakeholders in the chain in rural areas in the short term	30% (B1)	6 (C1)			(D1) = 0.72 (i.e. 40% * 30% * 6)			
1.2 Potential to increase incomes in rural areas in the long term	40% (B2)	5 (C2)			(D2) = 0.80			
1.3 Potential to increase female chain actors' income, assets or jobs in rural areas	30% (B3)	4 (C3)			(D3) = 0.48			
TOTAL 1					(D1) = D1 + D2 + D3 = 2.00			
2. SOCIAL IMPACT AND GENDER EMPOWERMENT	(A2): 30%							
2.1 Potential to increase chain stakeholders' self-esteem	20% (B1)	6 (C1)			(D1) = 0.36			
2.2 Potential to generate knowledge and contacts that foster long-term development	50% (B2)	6 (C2)			(D2) = 0.9			
2.3 Potential to create positive change in poor households' decision-making: women's increased control over resources, changes in roles and responsibilities ⁶	30% (B3)	5 (C3)			(D3) = 0.45			
TOTAL 2					(D2) = 1,71			
3. ENVIRONMENTAL IMPACT	(A3): 30%							
3.1 Potential for the sustainable use of water and soil	50% (B1)	7 (C1)			(D1) = 1,05			
3.2 Potential to use women's and men's traditional knowledge on natural resource management	50% (B2)	9 (C2)			(D2) = 1,35			
TOTAL 3					(D3) = 2,4			
RESULT OF THE EVALUATION					E = D1 + D2 + D3 = 6,11			

The impact dimensions of the project are labeled as (A1) and they are: economic (A1), social (including gender) (A2), and environmental dimension (A3). Each dimension is weighted (%) in relation to the others. The relevant sub-criteria for each dimension are labeled as (B1) and are weighted to reflect their relative importance in (%). Then, a numerical ranking from 1 (a very negative impact) to 10 (a very positive impact) is used to rate the expected effect that each market opportunity (MO1, MO2, MO3, etc.) would have on the different impact dimensions and sub-criteria specifically (value from 1 to 10, labeled as Ci). Finally, the weighted results from each sub-criteria (labeled as Di) for each market opportunity are totaled (labeled as E) to allow comparison of the overall impact potential of all market opportunities. As an example the table present calculation for the market opportunity 1 (MO1).

Step 6: interpreting the results

It is recommended to discuss and interpret results with the actors involved in the market opportunity to create ownership and agreement on results by all stakeholders.

If the evaluation chart is prepared using average values obtained from individual evaluations, it will be interesting to discuss their final results separately as well as the differences among the individual evaluations. The latter will allow you to discuss why there are similarities and differences among evaluators, if such be the case.

Step 7: drawing sound conclusions

Which market opportunities should be prioritized is partly a decision that will depend on the final score in each application.

Nevertheless, it will also be important to consider other issues and their relative importance regarding the market opportunity that may not yet have been taken into account. This is particularly important if the assessed market opportunities received similar scores.

For example, certain market chain opportunities might better capitalize on assets that are already available (e.g. market information, production know-how and business contacts, etc.).

Gender is another very important aspect to take into account when choosing a market opportunity. Gender inequalities are still present in many market chains. This disparity can be expressed in terms of power holding positions, access to resources and opportunities and benefits (e.g. income received). Thus, contributing to reduction of gender inequalities and enhancement of women's economic

empowerment or, at a minimum, seeking to avoid negative impact on the most vulnerable actors, including women, should be important considerations when finally discussing and choosing a market opportunity.

**Considerations
when applying the
tool:**

The Gender-Sensitive Impact Filter is a flexible tool, given that it can be adjusted to different context where an ex-ante impact assessment is relevant. In either case, when adapting the tool, those using it need to redefine the development objectives, and the three impact dimensions and their sub-criteria, as well as the way they are weighted. The Gender-Sensitive Impact Filter is derived from the poverty filter⁶ (Devaux & Thiele, 2004).

6. Devaux A. and Thiele G. 2005. Filtros de pobreza para identificar oportunidades de mercado favorables para pequeños productores. In: Conceptos, Pautas y Herramientas, CIP, Papa Andina, p.84-88.

Tool 2: Gender Organizational Assessment of Partner Organization

Barone S., Amaya N., Terrillon J., Mayanja S., Velasco C., Mudege N.

Overview:

Who: PMCA Facilitators
 When: Beginning of Phase I of PMCA
 Preparation: ½ day (capacity building)
 1 day (testing the tool)
 Category: Interview
 Duration: 45-60 min. per interview

Brief description:

The tool aims at collecting and analyzing the perspective of key institutions and stakeholders intervening, influencing or supporting the VC development. The analysis focuses on understanding both: i) the gender awareness and knowledge of the institution in a given context, and ii) the capacities of the institution to implement gender responsive actions in support to gender equality and empowerment.

The institutions selected for the survey and assessment include farmer organizations, local/regional government, NGOs, R&D institutions and other service providers. The total number of interviews to realize for the survey should be among three to five approximately.

Purpose:

- Assess the knowledge and awareness of the supporting organizations and institutions and their capacity to respond to gender issues related to:
- gender roles and division of labor within the value chain

- gender differences in access to and control of resources (lands, equipment, etc.) and benefits (income and expenditure)
- gender differences in capacity to exert advocacy and influence policy
- external factors that may influence the above (enabling/disabling environment)
- Identify possible partnerships/synergies to implement inclusive value chain interventions.

Use in PMCA:

This tool can be applied at the same time as the Qualitative Assessment of the Market Chain (see Trainer's Guide). The tool is especially useful when a PMCA intervention is implemented in a context where the R&D institution leading the PMCA has limited knowledge of the social context, specifically with respect to gender. Information collected can also feed into the Gender-Sensitive Value Chain Mapping (Tool 3)

Step 1: select the team of interviewers, develop and test the interview

Interviews shall be conducted by staff members of the R&D institution who will act as PMCA facilitator or by a team of interviewers. It is important to consider gender balance both among the interviewers and the interviewees, in order to obtain a wider range of perspectives. Interviewers should be familiar with gender concepts and qualitative data collection and analysis. If this is not the case, training on basic gender concepts will be necessary.

Step 2: adjust the interview

It is recommended to test the interview before its application; two to three tests should be conducted to assure that all the questions are clear and well understood by the interviewees. Thus, the interview will be revised and adjusted. An example of the interview's guide is presented at the end of the tool (Table 1/ tool 2)

Step 3: identify key institutions and actors to be interviewed

Before going to the field, map the relevant market chain actors and staff from governmental and non-governmental organizations that you will need to interview. Such information can be obtained by key informants or from secondary data (project reports). Another option would be to hold a brainstorming session among staff of partner organizations in the region. The guiding questions to select the institution and the staff to be interviewed within the institution can be:

- What are the organizations or institutions involved in the agriculture development sectors?
- Which of these institutions support economic empowerment of women in that particular market chain?
- For each selected institution, key actors to be interviewed will be selected by following guiding question:
 - Who is in the management position?
 - Who is engaged at the operational level?
 - Who is in charge of gender mainstreaming if any?

Step 4: conduct interviews

- Schedule the appointments with the identified people to be interviewed in each institution.
- At the moment of the interview, remember to introduce the topic, as well as the objectives of the interview.
- Break the ice before starting the interview by providing some personal information such as your name, position, number of years working in the organization, knowledge and understanding of the topic, that can make the interviewee more relaxed and prone to respond.

Step 5: systematize results and extract main messages

- Clarify questions when you perceive that the interviewee does not understand the question properly. Be careful to use simple terms, explain if necessary.
- Two interviewers should be present during each interview: one should be directing the interview and the other taking notes.
- If possible and with the interviewee's agreement, record the interview.
- Be aware of nonverbal communication of the respondent (e.g. facial expressions, gestures, posture, tone of voice, etc.).
- Give a written questionnaire to interviewee before interview, when possible.
- Extract main messages related to key themes of interest: what are the main gender inequalities along the value chain? What are the capacities of the organizations to carry out gender-responsive interventions or services?
- Decide whether the interviewed organization can be a potential partner in ensuring that identified gender-based constraints are addressed
- Determine whether this organization needs some capacity building in gender mainstreaming and identify possible areas of support.

Table 1/tool 2: Example of interview for the Gender Organizational Assessment of Partner Organization tool

Name of Interviewer _____ Sex of the interviewer _____
 Interviewee's name: _____ Name of organization: _____ Date: _____
 Interviewee's position/title: _____ Country/province/community: _____
 Interviewee's sex _____ Interviewee's age _____

<p>Section A: Institutional knowledge and awareness on gender issues and capacity to implement gender - sensitive interventions</p>	<p>Key Questions per section:</p> <p>1. Can you please tell me about the roles that your organization plays in the XXX value chain? Please provide a concrete example of interventions in favor of different actors (producers, processors, etc.) in your value chain. _____</p> <p>2. Has your organization developed a policy, a strategy or guidelines to integrate a gender perspective in its value chain interventions or to target women specifically? a. Yes. Explain. _____ b. No. _____ c. Some. Explain _____ d. I don't know _____</p> <p>3. How do you consider the outcomes of these interventions specifically aimed at women? a. Good _____ b. Average _____ c. Not so good _____ d. Bad _____ Explain _____</p> <p>4. How would you consider your organization's awareness and understanding of gender issues related to agriculture and value chain interventions? a. Good _____</p>
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	<ul style="list-style-type: none"> b. Some understanding and experience c. Limited understanding and capacity to implement actions that promote gender equality <p>5. Gender roles, jobs and positions within the institution:</p> <ul style="list-style-type: none"> a. How many people work in your institution? b. What are the high level positions (i.e. leadership or management positions) in your organization? c. Who holds them? How many of these positions are held by women? d. What are the other positions and role in your institution? How many of those are held by women? By men? e. Are there any tasks primarily performed by young men/women? Which ones? f. Do you think that gender equity concept and women inclusion is part of your organization vision and style of operation? To what extent? Examples? <p>6. Does your institution offer social or financial service? Who receives them? Do women have access to these?</p> <ul style="list-style-type: none"> a. Yes b. No c. Some d. Don't know <p>Explain _____</p>
<p>Section B. Organization's knowledge on women's and men's roles in the value chain and main gender-based constraints</p>	<p>7. What roles do men and women play in the value chain? Please provide examples _____</p> <p>8. What are the constraints that men and women face in participating along the value chain from production to commercialization?</p> <ul style="list-style-type: none"> a. Women face a lot of constraints b. They face some c. They don't face any d. Don't know

	<p>9. Do you think that women and men along the VC (especially farmers but also in other segments of the chain, e.g., traders) are equally represented in leadership positions and are able to express their opinions in public spaces and to be listened to?</p> <p>a. Yes. Can you please explain and provide examples? _____</p> <p>b. No. Can you please explain and provide examples? _____</p> <p>c. I partially agree _____</p> <p>d. Don't know _____</p>
<p>Section C. Organization's understanding and knowledge of men's and women's access to resources</p>	<p>10. In the region in which your organization works (i.e. name the study area), do you think that women /female farmers have, in general, equal access to land, water for irrigation, and agricultural technology as men?</p> <p>a. Yes. Explain and provide an example _____</p> <p>b. Some _____</p> <p>c. No. Explain and provide an example _____</p> <p>d. Don't know _____</p> <p>11. Based on your experience and knowledge, do women have the same access than men to education and information (extension services, platforms, networks and other sources of information) along the value chain as their male counterparts? Be specific on the type of capacity building or service</p> <p>a. Significant differences _____</p> <p>b. Some difference _____</p> <p>c. No difference _____</p> <p>d. Don't know _____</p> <p>12. Based on your experience and knowledge, do women have the same access than men to value chain support services (formal and non-formal financial institutions, business training/development services, research institutions, etc.)?</p> <p>a. Yes. Explain _____</p> <p>b. No. Explain _____</p> <p>13. What is the level of access among women to business development services (BDS)?</p> <p>a. Good _____</p>

	<p>b. Fair</p> <p>c. Poor</p> <p>Please explain. _____</p> <p>14. Are business development services adapted to the specific needs of female farmers (e.g. timing and location of service delivery, geographical scope, affordability, content, and methodology accessible to individuals with lower levels of education, etc.)?</p> <p>a. Yes</p> <p>b. Some</p> <p>c. No</p> <p>d. Don't know</p> <p>Specify which ones and the benefits they provide in this respect. _____</p>
<p>Section D. Organizations' knowledge and understanding of women's leadership and ability to benefit from VC interventions</p>	<p>15. Are women formally members of farmers groups?</p> <p>a. Yes</p> <p>b. No</p> <p>c. Some</p> <p>d. Don't know</p> <p>Explain _____</p> <p>16. In general, do women take part in the farmer group meetings?</p> <p>a. Yes, the same as men</p> <p>b. Yes, but less than men</p> <p>c. Yes, more than men</p> <p>d. Don't know</p>

17. During those meetings, are women accustomed to expressing their needs, making their points of view heard, and voting within these associations?

- a. Yes, same as men
- b. Yes, but less than men
- c. Yes, more than men
- d. Don't know

Explain _____

18. To what extent do women hold leadership positions in organizations (farmer organization or other type of organization) in which both men and women are members?

- a. Low
- b. Fair
- c. Average
- d. Important

19. Are there special measures in the farmer organizations' statutes, such as quotas, to guarantee women's access to decision-making positions within these organizations?

- a. Yes. Provide an example _____
- b. No

20. What are the capacities of women leaders to influence collective decisions regarding the service sectors and development of the value chain (e.g. in platforms, multi-stakeholder processes)

- a. Low
- b. Fair
- c. Average
- d. Important

Give examples. _____

21. How could those without access to the minimum resources and necessary services to participate in the value chain be included? In what spaces?

Section E.
Organization's knowledge and awareness on women's ability to influence decisions in spaces of power

Tool 3: Gender-Sensitive Value Chain Mapping

Mayoux L, Vanderschaeghe, M., Lindo P., Senders A., Motz M. and Terrillon J. Based on Mayoux and Mackie, ILO, 2008 and on APF Gender in Value Chains Toolkit, version 2.

Overview:	Who:	PMCA facilitators, R&D organization, thematic group members ⁷
	When:	Beginning and end of Phase I, Phase 2 and 3 (eventually)
	Preparation:	1 day
	Duration:	½ day

Brief description: This tool can be used as a preliminary brainstorming tool by R&D organizations as an attempt to understand the gender dimensions (level and term of men and women's participation) of the market chain. The information used in this tool is obtained from the Qualitative Assessment of the Market Chain (see Trainer's Guide) that is carried out in Phase I, alongside with any relevant secondary data. This mapping tool is then used in a participatory manner in the first final event, to understand both male and female chain actors, raise awareness on gender issues and inequalities along the chain in a systemic way, and start reflecting on what could be done to bridge the gender gap.

Purpose:

- Make visible women role and activities in the value chain.
- Identify where men and women play a dominant role in specific segments of the chain where value is high.
- Use a gender lens to:
 - Identify power, influence and control along the value chain.

7. In case the PMCA trainer is not confident with his/her gender knowledge and experience, a gender expert may be required to develop gender session of PMCA.

- Determine whether the support services and the environment (physical, business, policy, social, etc.) are enabling men and women's participation and upgrade in the value chain.
- Identify bottlenecks (constraints) and opportunities in the value chain and how they influence women's economic empowerment.

Use in PMCA:

When used in the PMCA, the Gender-Sensitive Value Chain Mapping tool enables the facilitating R&D organization to capture information on male and female actors along the chain and existing gender issues that may impede or foster the chain development. It is an iterative tool, which can be used after the Rapid Assessment of the Market Chain (beginning of Phase 1) and at the end of Phase 1 during the final event (during the Market Chain Sketch). It can also be used in Phase 2 when market opportunities are analyzed, to get an overview of the context and the constraints and opportunities in terms of gender equality and women's economic empowerment. Finally, a new gender-sensitive map could be drawn at the end of Phase 3 to reflect whether any changes have occurred as a result of the PMCA interventions.

**Step 1:
actor mapping**

Draw a map of the value chain using the following criteria.

- What is the geographic area (country, province) and specific end product for your value chain?
- What is the end market?
- What are the main processes/nodes involved in the chain? Write them down on a colored card.

**Step 2:
activity mapping**

- Who are the main actors in each of those processes/nodes along the chain? Try to differentiate actors according to size, legal status (family business, enterprise, farmer-based organization, cooperative, etc.). Write them on cards of a different color.
- How many actors in those organizations/institutions are men and how many women?
- If there are businesses, which ones are owned by men and by women?
- Are jobs created throughout the value chain? Where? Are these occupied by men or women?
- Where do men and women provide unpaid family labor?
- A key should be developed to facilitate the map reading.

Step 3: identify chain supporters, and opportunities and constraints for women and men at support service level

- Who does what? - Develop activity profile tables (See table I/tool 4 of Gender-Based Constraint Analysis and Planning) for production, processing and marketing nodes.
- What is the degree of responsibility of men and women and young men and young women for each activity in each node of the chain? You can indicate the degree of responsibility by using X or percentages (X: low, XX: medium, XXX: high).
- Identify the most important actors outside the chain that influence and support it. It would be useful if these actors could be identified by process/node where they mostly intervene. Examples of support services are extension services, business development services (market information, trade facilitation, business management, brand develop-

ment, quality assurance) and financial services (savings, credit, insurance), research. Include also services that can alleviate women's workload.

- Which services do men and women get from participating in the chain and how? If possible, mention them by node and the percentage of men and women who receive these services.
- Do men and women have equal access to these services?
- What are the main constraints that men and women face to access those supporting services?
- Identify important factors that affect the role and position of men and women in the value chain, such as land ownership rights, infrastructures, public policies, gender norms and stereotypes, market and consumer trends, climate change, etc. Write them on colored cards. You can use minus (-) and plus (+) symbols to illustrate constraints and opportunities.
- What are the likely constraints women and men could face in this regard?
- What could be the potential strategies to overcome these constraints?
- It will also be useful to identify the benefits that men and women have from participating in a specific chain.
- This tool is complementary to the Gender-Based Constraint Analysis and Planning (tool4), and they are best used in tandem with each other.
- Enough time for preparation is required, especially for data collection from secondary sources, prior to mapping.

Step 4: identify opportunities and constraints for men and women in the value chain environment

**Considerations
when using the
tool:**

- The map can always be improved throughout the PMCA cycle, as the R&D organizations build up information, for instance obtained through the Gender Organizational Assessment of Partner Organization (tool 2)
- Facilitators should practice and get familiar with the tool before they use it with the thematic groups. A gender expert should train first-time users of the tool.
- Ensure that a simple and clear key is developed to decipher the map. Innovative ways should be sought to represent numbers of actors in a given node, considering their volume of participation, etc.
- Using colour cards to illustrate chain actors and supporters and factors of the environment is recommended, as seen in the examples (fig. 1, 2 and 3).

The following steps should be followed while drawing the gender-sensitive map of the value chain. Fig. 1, 2 and 3 illustrate the progression of the mapping with the use of colored cards or post-it notes when the mapping is participatory. The result of the mapping exercise for the Cooking Banana Value Chain is presented in the annexes (Annex 3).

Figure 1/Tool 3.

Mapping of banana cooking value chain male and female actors in Uganda (yellow)

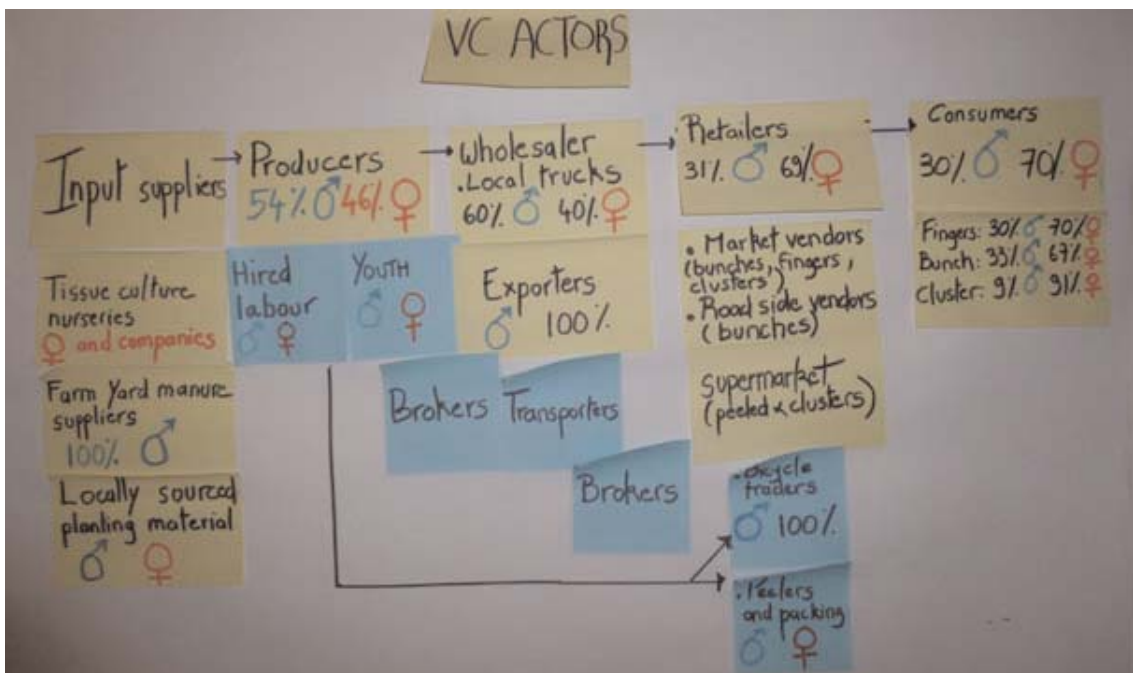


Figure 2/Tool3. Mapping of activities carried out by male and female actors along the value chain (orange)

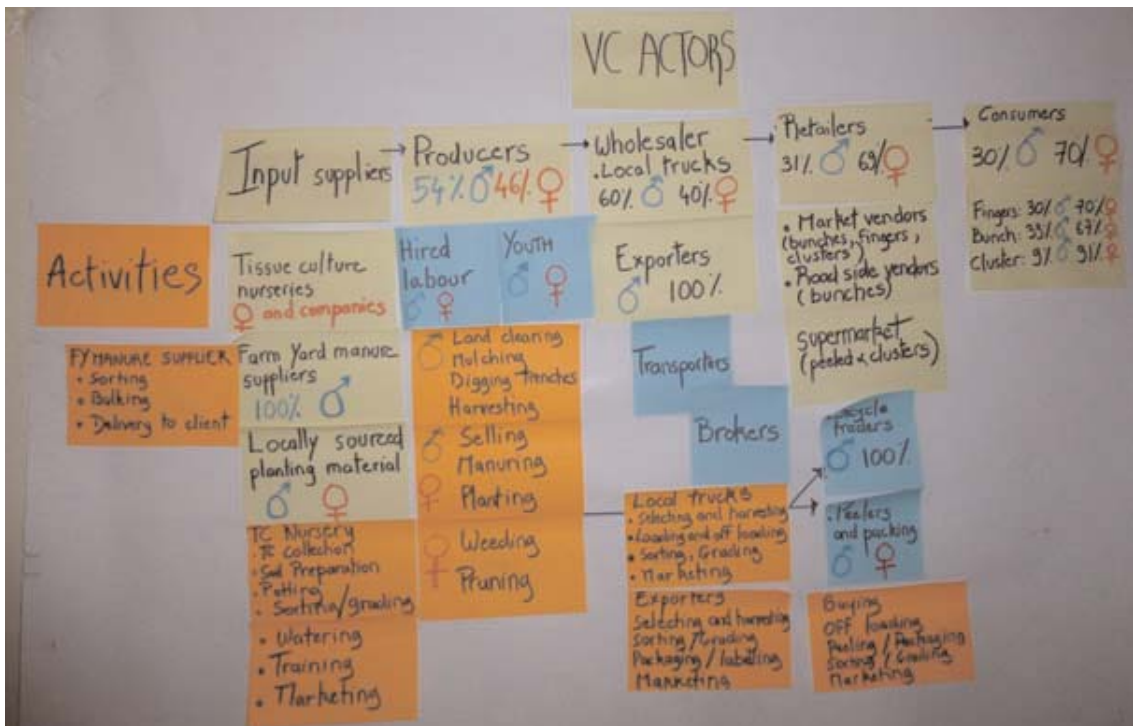
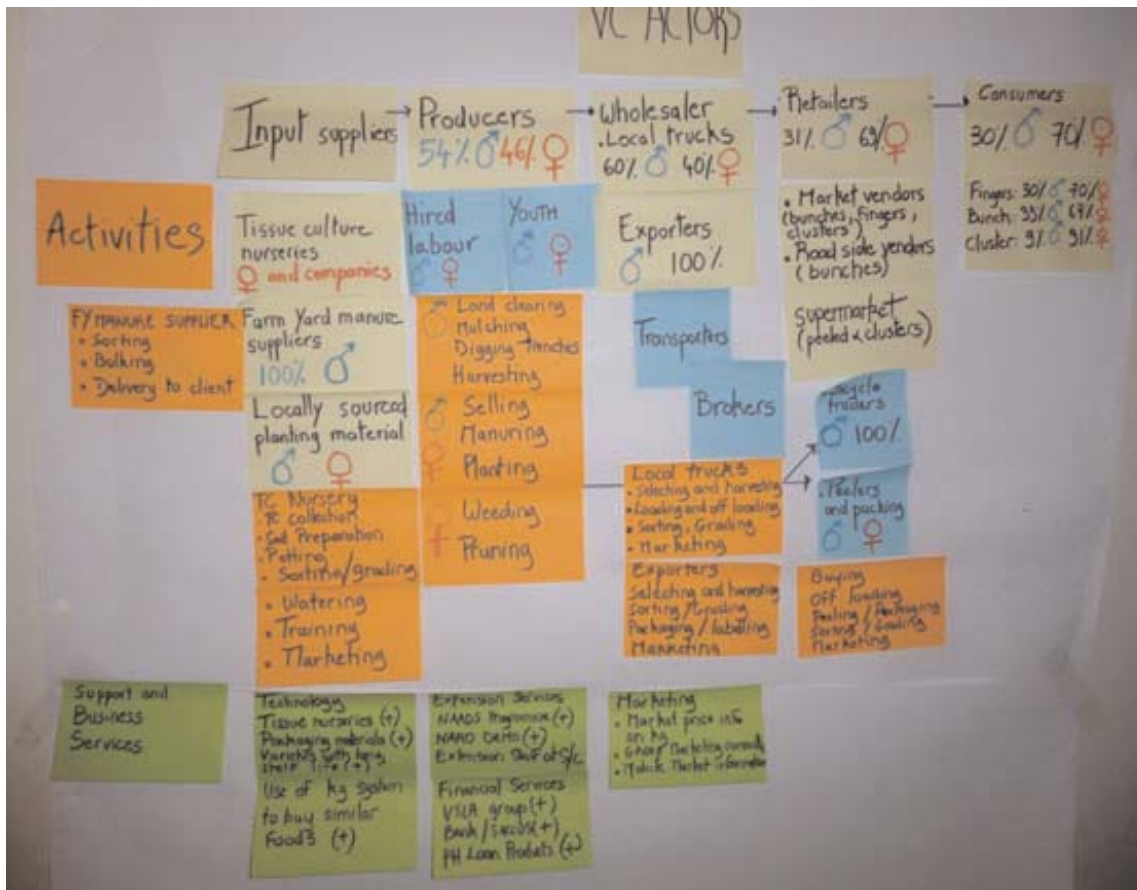


Figure 3/Tool 3.
Mapping of value chain support and business services (green, bottom).



Assignment 2: PMCA Evaluation and Planning

Task for the Group Work

- 1 Mention and discuss the reasons why PMCA is of interest / is not of interest for your assessed market chain.
- 2 Mention and discuss issues that will be important when potentially applying PMCA in your market chain (e.g. critical factors that make successful application possible).
- 3 Develop an action plan (see table below) to potentially apply PMCA to your market chain.
- 4 Report the results of the group work to the whole group.

Action Plan

Step	Activity	When	Responsibility
1			
2			
3			
4			
5			
6			
7			
8			

Workshop 2

Analysis of Market and Innovation Opportunities

Training PMCA Phase 2

- Context:** One or several R&D organizations have successfully implemented PMCA Phase 1 and now need more specific information and guidance regarding Phase 2.
- Participants:** R&D staff and facilitators from those organizations applying PMCA in their own context. The sessions mainly target future facilitators of the thematic groups formed for Phase 2. However, the decision makers of the R&D organizations and field staff might also participate.
- Workshop Objectives:** By the end of the event, trainees will be able to:
- 1 Prepare a work plan for the design and implementation of PMCA Phase 2
 - 2 Explain key concepts and practical issues related to PMCA Phase 2 (see section on PMCA Phase 2 in the User Guide, and Gender-Based Constraint Analysis and Planning (tool4) for key gender concepts)
 - 3 Facilitate the thematic group work during Phase 2 and continuously identify on-going mentoring and backstopping needs

- Workshop Content:**
- Presentation of theory and practice of PMCA Phase 2 (use of case studies which illustrate gender issues).
 - Building skills for the work in thematic groups, in particular: gender in value chains and business development skills.
 - Tools for PMCA Phase 2, with application if possible. These tools include: Gender-Based Constraint Analysis and Planning (tool4), Business Plan (tool7 User's Guide), Gender Risk-Benefit Analysis (tool5).

Suggested Duration: Four days, including the application of two or three tools depending on the context. One of these tools should be the Gender Based Constraint Analysis and Planning Tool (tool4).

Backstopping PMCA Phase 2

Context: Despite having at hand the PMCA User Guide, facilitators of thematic groups will face different theoretical and practical issues that might prevent them from moving ahead with the work in their thematic groups. The PMCA trainer should respond to these challenges with practical suggestions.

Clients: Facilitators of thematic groups during PMCA Phase 2.

Backstopping Objectives: With these backstopping activities, trainees will be able to:

- 1 Form thematic groups that have good potential to define and pursue equitable and inclusive market chain innovations with interesting potential development.

Check Points during PMCA Phase 2:

- 2 Understand specific interest of participants in the groups.
- 3 Understand the relevant theoretical and practical aspects concerning the work during Phase 2.
- 4 Keep PMCA trainers informed about progress.
 - a Selection of facilitators to lead the work of the thematic groups. It is recommended that these facilitators have good business skills, capacity and experience in leading group dynamics, and skills in gender analysis when possible.
 - b Readjustments of the scope and focus of thematic groups.
 - c Development of trust and leadership legitimacy amongst thematic group members. Understand specific interest, and potential of the group participants.
 - d Good planning and implementation of activities during Phase 2.
 - e Sound analysis of proposed joint innovations (using appropriate research tools) and introduction of the Marketing Concept Development (tool 6 user's guide).
 - f Backstop the development of the business plan, augmented with Gender-Based Constraint Analysis and Planning Tool (tool4). Expertise could be outsourced if PMCA trainer sees the need.
 - g Inclusion of new missing actors for final event and PMCA Phase 3.
 - h Planning of the final event of PMCA Phase 2: tentative agenda.
 - i Presentations of progress and action plans by thematic groups at final event.

Note for implementation:

For logistic reasons, the backstopping of activities related to the preparation of final event of phase 2 (check points g to i) might be realized just before the final event take place, and the training workshop for phase 3 may be conducted right after the final event of Phase 2. This will allow the PMCA trainer to be present and to see "how things go," making him/her aware of the strengths and weaknesses linked to the PMCA application (i.e., quality of participation, level of trust and collaboration amongst actors, capacities of PMCA facilitators).

Suggested Structure of Workshop 2 Sessions:

Day 1:

- Session 1:** Recapitulation of PMCA theory and practice relating to Phases I
- Session 2:** Review of gender results captured in phase I: Gender Organizational Assessment of partner organization (tool2) and Gender-Sensitive Value Chain Mapping (tool3)
- Session 3:** Presentation and fine tuning of program for Final Event of Phase I

Day 2:

The day is used for the implementation of the PMCA Phase I Final Event.

Day 3 and 4:

- Session 4:** Evaluation of the Final Event and PMCA so far / Outlook for Phase 2
- Session 5:** Capacity building in conducting Focus Group Research (tool 5 User's guide)
- Session 6:** Capacity building in Marketing Concept Development (tool 6 user's guide)
- Session 7:** Capacity building in using the Gender-Based Constraints Analysis and Planning (tool 4)
- Session 8:** Improvement of facilitation skills in thematic groups
- Session 9:** Planning of Phase 2 and final discussion (including workshop evaluation)

Workshop 2 - Agenda

Day I Workshop - Backstopping PMCA Phase I Final Event

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop, revisiting of the workshop program	Representative of R&D organization
8.50-9.30	Recapitulation of PMCA Phase I	PMCA Trainer
9.30-10.00	Preparation of the Final Event I: objective and implementation	PMCA Trainer
10.10-10.30	Coffee Break	
10.30-11.30	Presentation and discussion of market chain survey. Presentation of results of the: Gender Organizational Assessment of Partners Organization (tool 2) and of the Gender-Sensitive Value Chain Mapping (tool 3)	PMCA trainer and PMCA facilitators
11.30-12.30	Training: participatory exercises in thematic groups (Gender- Sensitive Value Chain Mapping)	PMCA Trainer
12.30-14.00	Lunch	
14.00-15.00	Discussion and readjustments of Final Event I program	PMCA Trainer
15.00-16.00	Practice of market chain sketch	PMCA Trainer

Day 2 - Final Event of PMCA Phase I (Tentative Agenda)

Time	Item	Responsible person
9.00-9.30	Welcome to market chain actors	R&D staff
9.30-9.45	Welcoming words, including mention of PMCA	Representative of R&D organization

9.45-10.00	Market chain sketch	R&D support staff for the final event
10.00-10.40	Presentation and discussion of the results from the Market Chain Survey	PMCA facilitator and R&D staff for final event
10.40-11.00	Coffee Break	
11.00-13.00	Discussion and definition of thematic group by innovation opportunities. Work in thematic groups for brainstorming and introducing gender mapping concept	PMCA facilitators, participants
13.00-14.00	Lunch	Representative of R&D organization
14.00-15.00	Reports from thematic groups	Representative of thematic groups
15.00-15.30	Conclusions, agreements and next steps	PMCA facilitator, representative of R&D organization

Day 3 Workshop - Training PMCA Phase 2

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop, revisiting of the workshop program	Representative of R&D organization
8.50-9.20	Evaluation of Final Event Phase I and outlook of Phase 2	PMCA Trainer
9.20-10.00	Presentation and discussion of PMCA Phase 2 implemented in other context: theory and practice	PMCA Trainer
10.00-10.30	Coffee Break	
10.30-11.00	Introduction: PMCA Phase 2 and the different research tools: Rapid Market Appraisal (tool 3 User's guide), Focus Group Research (tool 5 User's guide),	PMCA Trainer

11.00-12.00	Training: Rapid Market Appraisal and Group work: Planning of Rapid Market Appraisal	R&D staff
12.00-12.30	Presentation of plan to conduct Rapid Market Appraisal	R&D staff
12.30-14.00	Lunch	
14.00-16.00	Exercise about the implementation of Rapid Market Appraisal	R&D staff
16.00-16.40	Presentation of Rapid Market Appraisal	PMCA Trainer
16.40-17.30	Feedback from PMCA Trainer, making reference to how research tools must be used during PMCA Phase 2	PMCA Trainer

Day 4 Workshop - Training PMCA Phase 2

Time	Item	Responsible person
8.30 - 10.00	Training: Business Plan and Cost and Benefit Analysis tools	PMCA Trainer
10.00-10.30	Coffee Break	
10.30-11.30	Practical sessions	PMCA Trainer
11.30 - 13.00	Training and practice: Gender-Based Constraint Analysis (tool 4)	PMCA Trainer
13.00-14.00	Lunch	
14.00-15.30	Drafting a business plans	PMCA Trainer
15.30-16.00	Improved facilitation and management of thematic group meetings during PMCA Phase 2	PMCA Trainer
16.00-17.00	Group work: planning of next steps in Phase 2	R&D staff
17.00-18.00	Presentation next steps for Phase 2 and final discussion	PMCA Trainer

Tool 4. Gender-Based Constraint Analysis and Planning

Terrillon J., McEwan M., Mayanja S. (2014)

Overview:	<p>Who: PMCA facilitators (R&D organizations), thematic groups</p> <p>When: Phase 2</p> <p>Preparation: 1 day</p> <p>Duration: 1 day</p>
Brief description:	<p>This tool can be used as a follow up of the Gender-Sensitive Value Chain Mapping (tool 3). It comprises two tables. The first one provides insights into the division of work between female and male actors along the different nodes of the value chain, while also identifying the constraints faced by these actors in accessing resources and services needed to carry out their activities. The second table enables the users to make an analysis of the identified gender-based constraints by looking at its consequences, both for the actors and for the sector as a whole, and by prioritizing the most crucial to be addressed. Root causes of the gender-based constraints are then described to inform strategies to address them. These strategies can then be mainstreamed into a business plan.</p>
Purpose:	<p>To provide insights into:</p> <ul style="list-style-type: none"> ● division of work by sex; ● analysis and understanding of the constraints, linked to the access to resources and services, that men and women face when undertaking activities at different nodes of a value chain.

It enables facilitators to prioritize constraints and identify actions to address these for planning purposes, in particular when drafting business plans.

Use in PMCA:

This tool is best used after a market or business opportunity has been selected by the thematic group. It can be first used by facilitators and then validated in a participatory way with thematic group members to realize that, while the opportunity may be good for both male and female actors, different strategies may have to be employed to allow optimal participation and benefits for different gender groups. The information obtained from the analysis is used to develop gender-responsive business plans and innovations.

The information collected through the Gender-Sensitive Value Chain Mapping (tool 3) could be used as input for Step 1 actor and activity mapping.

Step 1: actor and activity mapping

- Identify actors for each node of the value chain (e.g. small-scale producers, processors, vendors, etc.).
- Make one single table, focusing on one actor in a specific node or function of the value chain (table 1/tool 4).
- For each type of actor, list the activities and indicate who carries out the activity (male/female or male youth/female youth). For instance, you could ask small-scale producers to list all the activities they perform during the crop season, from crop and land selection to selling.

Step 2: degree of responsibility by activity

- For each identified activity, probe the degree of responsibility for every gender category by asking "who does it the most?" or "who is mostly involved in that activity?"

Step 3: identify constraints by activity that chain actors face

- Indicate whether the responsibility is low (X), medium (XX), or high (XXX). One can also use percentage as a measure of degree of responsibility.
- Identify the constraints men, women and youth (female and male) face or are likely to face while carrying out different activities in each node of the chain. These constraints may be related to access to and control of resources, when such restraints hinder and/or limit actors from benefiting from their participation in the market chain.
- To identify possible constraints, consider the different capitals described in the PMCA User Guide (p. 3)⁸.
- Fill in column four of Table 1/tool4 with constraints faced by different actors while carrying out an activity. For example: female fresh root producers in sweet potato market chain in Uganda mentioned planting as an activity in which they are solely involved⁹. They identified lack of access to labor force and manure as a major constraint.

8. Different types of resources/capital: natural, physical, financial, human, social.

9. Sweet Potato value chain, Uganda, workshop on gender mainstreaming in business planning, organized by CIP, April 2013, Entebbe, Uganda.

Table 1/tool14: Identification of gender-based constraints for each actor in a particular node of the value chain

Activities carried out by chain actor	Roles and responsibilities low=x, medium=xx, high=xxx				Resources or service needed to carry out the activity and availability for each actors				Constraints that limit access to and control of resources					
	Male		Youth		Male		Youth		Male		Youth		Male	
			Female	Male			Female	Male			Female	Male		

Step 4: analyze the constraints

- Perform critical analysis of constraint using Table 2/ tool 4, in order to ascertain the causes and effects. Understanding the consequences of each constraint enables actors to assess the potential impact of a constraint on either the actors themselves in terms of livelihoods, incomes, and yields or, on the sector as a whole, in terms of quality, volumes and supply. Understanding the causes makes it possible to address the roots of a problem as opposed to the symptoms.
- Identify criteria to be used in prioritization of constraints (e.g. business opportunity, equitable resource allocation, enhancing partnerships in the chain etc.)
- Prioritize constraints to be addressed.

Step 5: formulate actions to address the constraints

Using the following Table 2/tool4 scheme, complete the columns as follow:

- Formulate gender-based constraints (column1) and identify consequences (column2)
- Brainstorm and agree with participants the possible causes identified constraints (column 3)
- Identify potential actions addressing the causes of the priority constraints (column4) for all gender categories.

Table 2/ tool4: Potential actions to address different constraints by node of the market chain

Gender-based constraint(s)	Consequence	Cause	Actions
Value chain actor/ segment:			

Considerations when using the tool:

This tool is best used with thematic group members in separate focus groups of men and women, followed by a validation in plenary with both groups. It is also advisable to meet actors for each segment of the value chain and fill the tables separately.

It may be important to separate the youth category into female and male, depending on the type of chain and socio-economic setting. For example: if land is a constraint, usually female youth face more constraints than male in accessing and using family land.

Table 2/tool4 implies critical analysis of gender-based constraints which may require time and a certain level of expertise. It could also be filled in by facilitators in a separate working session and subsequently validated with thematic groups. An example of mapping constraints in sweet potato market chain is presented in Table 3/tool4

Table 3/ tool4: Identification of gender-based constraints for small farmers in a sweet potato market chain, Uganda (2014)

carried out by chain actor	responsibilities low=x, medium=xx, high=xxx		carry out the activity and availability For each actors			access to and control of resources	
	Male	Female		Male	Female	Male	Female
Farmers							
Site selection	xxx	-	Land Hal, cutlass	xxx	x		<ul style="list-style-type: none"> • Cultural barriers
Clearing	xx	xx					
Ploughing	xxx	-					
Planting	xx	xx	Knowledge	xxx	x		<ul style="list-style-type: none"> • Less membership of women • Meeting hours
Weeding	xx	xx	Finance	xxx	. x		
Harvesting	xx	xx					
Threshing	xx	xx					
Transporting	xx	xx					
Winnowing	-	xxx					
Bagging	xx	xx					

Workshop 3

Launching the innovations

Training PMCA Phase 3

Context:	The R&D organization(s) have already implemented PMCA Phase 2 and need now more specific information and guidance regarding Phase 3. As the activities are now very case-specific, PMCA training sessions must be adjusted to the specific context and needs.
Participants:	PMCA facilitators and R&D staff from the organizations that are implementing the PMCA in their own context. The sessions mainly target the facilitators of the thematic groups and the staff helping them in their work, including monitoring the progress and implementing the tools used for research. If staff from other R&D organizations has gained importance in leading PMCA activities, it is also welcome to attend.
Workshop Objectives:	By the end of the final event, trainees will be able to: <ol style="list-style-type: none">1 Describe how PMCA Phase 3 should be designed and implemented.2 Explain key concepts and practical issues related to PMCA Phase 3, including Marketing Concept Development (tool 6 User's Guide).3 Support development of gender-sensitive business models that will guide step-by-step implementation of innovations.

	4	Describe how the large final event could be set in place.
Workshop Content:		<ul style="list-style-type: none"> • Presentation of theory and practice of PMCA Phase 3 (use of case studies). • Planning of activities related to PMCA Phase 3. • Facilitation skills for the work in thematic groups, if needed. • Tools for PMCA Phase 3, with practice application if possible. These tools include: Focus Group Research (tool5 User's Guide) and Marketing Concept Development (tool6 User's Guide).
Suggested Duration:		Three days, including one day dedicated to final event of Phase2.

Backstopping PMCA Phase 3

Context:	The implementation of Phase 3 poses specific challenges for each thematic group. The PMCA trainer should guide the facilitators in this process and provide them with tangible help and assistance in the area of marketing concepts and product development, where the experience of involved R&D actors is commonly fairly weak. Special assistance is also needed for the planning and holding of the large final event to launch the achieved innovations with the presence of a wide range of media representatives.
Clients:	Facilitators of thematic groups during PMCA Phase 3 and supporting R&D staff

**Backstopping
Objective:**

With these backstopping activities, trainees will be able to:

- 1 Assure optimal use of tools suggested during Phase 3, especially Focus Group Research (tool5 User's Guide) and Marketing Concept Development (tool6 User's guide).
- 2 Move ahead with different activities at the same time, with small working groups which may be formed within thematic groups.
- 3 Plan for and successfully implement the large final event.

Check Points during PMCA Phase 3:

- a Make sure that each thematic group has a sound work plan for implementing their business model for PMCA Phase 3.
- b Review of the Focus Group reports and marketing concepts that emerge from this research.
- c Progress of product development and label design, when this it applies to the case.
- d Develop activities related to technological and institutional innovations.
- e Planning of the large final event: concept, involvement of the media, policy and decision makers, and potential investors at the launching of the innovations

Note:

Ideally, the backstopping activities relating to the planning and implementation of the large final event (end of Phase 3) should take place in a small workshop setting, where the PMCA trainer helps the R&D organization to set up a sound concept for this final event. Given the importance both of the quality of the product (labels, brand, and other marketing standards) and of a successful final event for the last structured phase of the PMCA application, Phase 3 calls for particularly careful backstopping!

Suggested Structure of Workshop 3 Sessions:

Day 1**Session 1:**

Workshop introduction and recapitulation of PMCA theory and practice relating to Phase 2

Session 2:

Presentation and fine tuning of program for Final Event of Phase 2

Day 2: The day is used for the implementation of the PMCA Phase 2 Final Event.

Day 3:**Session 3:**

Evaluation of Final Event of Phase 2 and of the PMCA so far and outlook for Phase 3

Session 4:

Capacity building on PMCA tool for Phase 3: using Focus Group Research (tool 5 User's Guide) and Marketing Concept Development (tool 6 User's Guide)

- Session 5:** Recapitulation of other important tools of Phase 3 (including the Quantitative Market Study (tool 4 User's Guide) and Gender Risk-Benefit Analysis (tool 5))
- Session 6:** Consolidation of facilitation skills (with emphasis on empowering key market chain actors involved in thematic group meetings)
- Session 7:** Planning of phase 3 and final discussion (including workshop evaluation)

Note: for the PMCA trainer, it is important to see how PMCA facilitators implement activities related to PMCA, in order to adjust the training and backstopping to the observed needs. When the training for PMCA Phase 3 is planned just after the Final Event of Phase 2, the PMCA trainer can attend this event and he/she can also conduct specific backstopping, just before it in order to help make the necessary adjustments.

Workshop 3 - Agenda

Day 1 - Backstopping for final event of phase 2

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop, revisiting of the workshop program	Representative of R&D organization
8.50-9.30	Recapitulation of PMCA Phase 2	PMCA Trainer
9.30-10.00	Phase 2 Final Event: objective and example of implementation in other settings	PMCA Trainer
10.10-10.30	Coffee Break	
10.30-11.30	Preparation and fine tuning of Phase 2 Final Event program and content	PMCA facilitators with PMCA trainer
11.30-12.30	Backstopping for PMCA phase 2 final event	PMCA Trainer
12.30-14.00	Lunch	
14.00-16.00	Last preparations for Phase 2 Final Event	PMCA Trainer

Day 2 - Tentative Agenda for final event of phase 2

Time	Item	Responsible person
9.00-9.30	Welcome of market chain actors	R&D staff
9.30-9.45	Welcoming words, including mention of PMCA	Representative of R&D organization
9.45-10.30	Presentation of invited person on a topic that is relevant to all groups	Facilitating R&D staff
11.30-11.00	Coffee Break	
11.00-12.30	Presentation and progress of each thematic group, and presentation of the prototype innovation, including work plans for phase 3	Facilitators with R&D staff and representatives of each thematic group
12.30-13.00	Plenary discussion and way forward	All participants
13.00-14.30	Lunch	Representative of R&D organization

Day 3 - Training Sessions for PMCA phase 3

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop, revisiting of the workshop program	Representative of R&D organization
8.50-9.20	Evaluation of Final Event of phase 2 and outlook of Phase 3	PMCA Trainer and participants
9.20-10.00	Presentation and discussion of PMCA Phase 3 implemented in other context: theory and practice	PMCA Trainer
10.00-10.30	Coffee Break	
10.30-11.15	Training of Focus Group Research and Marketing Concept Development (with emphasis on the process to obtain the necessary information to validate the marketing concept and visualizing it when designing and developing the product)	PMCA Trainer
11.15-12.00	Group work: Designing the process to develop and validate a marketing concept	R&D staff
12.00-13.00	Presentation of group work and discussion on product development aspects	R&D staff and PMCA Trainer
13.00-14.00	Lunch	
14.00-15.00	Group work: the Gender Risk-Benefit Analysis tool (tool 5)	PMCA Trainer with R&D staff
15.00-16.30	Planning of phase 3	R&D staff
16.30-17.30	Presentation and feedback from PMCA Trainer, making reference to how research tools must be used during PMCA Phase 3	PMCA Trainer

Tool 5. Gender Risk-Benefit Analysis

Mayanja S.;Terrillon J.;Vanderschaeghe, L. (2014)

Overview:	<p>Who: PMCA facilitators (R&D organizations) and thematic groups</p> <p>When: Phase 2 and 3</p> <p>Preparation: 1 day</p> <p>Duration: Half a day</p>
Brief description:	<p>The Gender Risk-Benefit Analysis is a useful participatory ex-ante assessment tool to quickly evaluate the effect that implementing a business opportunity has on female and male chain actors. The tool helps to ensure that business opportunities do not exert a negative effect on either female or male chain actors.</p>
Purpose:	<p>Selecting a business opportunity bears the risk of having a negative impact on some actors, especially those who are little visible, or have no voice. This tool enables facilitators and actors to perform an ex-ante analysis on the potential positive and negative effects of a business opportunity on chain actors, during business planning. It enables them to identify mitigating strategies to address potential negative effects, and also to decide whether the opportunity will be worth pursuing. The tool can also be used for monitoring and evaluation purposes.</p>
Use in PMCA:	<p>This tool can be used in PMCA Phase 2 and 3. It is helpful to score and assess the possible or actual risks and benefits that a business opportunity might</p>

have on different actors in a value chain, considering relevant dimensions such as amount of work, income, social position and/or market position.

It analyzes risks and benefits differentiated by gender, it creates awareness of the interdependence between actors in a market chain, and determines how the upgrading of one actor can affect the socio-economic conditions of another within the community and market chain.

It provides support to plan for potential actions to overcome identified negative impacts and thus increase benefits.

It screens for the best business opportunity (economic viability, inclusiveness) and eventually helps to decide whether it is possible to implement it or not, taking into account the benefits generated for vulnerable groups, including women.

Step 1:

List actors disaggregated by sex for each node of the market chain and place them on the vertical axis of the matrix shown in Table I/tool5.

Step 2:

Choose criteria for evaluating the effect of the opportunity and place them on the horizontal axis of the matrix in Table I/ tool5. Some examples of criteria could be:

- Time and work: this refers to changes in workload, work quality, tasks, required skills (skilled versus unskilled, formal education, training) and labor capacity (do people need to be hired or can members of the household or the actual business do it?).

- Income and control of resources: this refers to changes in income and control of resources such as land, animals, and credit.
- Social position: this refers to changes in social position and gender relations as a result of the value chain upgrading.
- Market position: this refers to changes in economic power position between value chain actors as a result of chain upgrading strategy.

Categories in the matrix can be adapted to specific situation and needs. Other relevant categories can be health, food security, etc.

Table 1/ tool5. Risk-benefit analysis matrix

Market chain		Activity	Criteria for evaluating the effect of the opportunity				
Actor			Time & work	Income & control over resources	Social position	Market Position	Other
Male							
Female							
Male							
Female							
Male							
Female							
Male							
Female							

Step 3:

Fill in the matrix with the participants/chain actors through a participatory process. Ideally you should use this tool with the thematic group members using the following questions:

- How will your future participation in the value chain change your work and the skills needed to do it?
- How will it affect your time use and the time you have for other activities?
- How will it change your income and the control of your income or other resources?
- How will it change your social and gender relations within the household and the value chain?

Some questions to deepen the discussion and come to proposal of action:

- Who is benefiting and who is losing due to the value chain upgrading?
- Do you notice differences between changes in the lives of men and women? if so, name them as well as their causes.
- To what degree are these changes desired?
- How can the negative impact be minimized? How can obstacles or negative factors be dealt with? Is it easier/harder for men and/or women to deal with those obstacles and do something about them?
- What actions can be taken to overcome potential negative impacts? Can men and women undertake those actions equally? Explain.

Let the participants answer the questions in groups. Hand out a copy of the matrix on a piece

of paper to be completed by each group with the guidance and monitoring of the facilitators.

The groups are formed corresponding to different nodes in the chain, to gender criteria (men and women in separate groups) or both (i.e. a female group of actors from a specific node and another of male actors, so one node would have two groups).

Each group presents its completed matrix in a plenary session. The facilitation helps to resume and highlight the most important positive and negative changes identified.

Step 4:

Information obtained in the workshop should be analyzed. The results can be used to improve the business opportunity identified by suggesting mitigating strategies aimed at reducing negative impact on either group, as well as to monitor and/or assess its impacts.

Considerations:

It is recommendable to have two facilitators with the ability to probe further into the first answers given, ensuring that women's voices do not get overpowered.

The tool can also be used with one type of value chain actor. The different categories on the vertical axis can be: men, women, household and/or other actors/community, depending on the specificities of the value chain and/or participants. See an example of an application of this tool in the annexes.

Workshop 4

Planning post PMCA activities

Context:	The R&D organization that has applied PMCA will face a new situation, where the role of the R&D organization has changed. The issue is no longer to facilitate a process but rather to respond to specific needs of the market chain actors who own the commercial innovations generated during the PMCA application. If technological and institutional innovations arise from the PMCA process, the R&D organizations will most likely be interested in consolidating these and taking advantage of new market opportunities to create further benefits for smallholder farmers linked to the targeted market chains.
Participants:	R&D staff and 'champions' ¹⁰ who have been involved in the PMCA application and who see a need to keep up the innovation process with new mechanisms.
Workshop Objectives:	By the end of the event, trainees will be able to: 1 Identify new opportunities for value chain upgrading and define roles of R&D organizations that have been involved in the PMCA application.

10. Champions are market chain actors who have demonstrated excellent capacities of leadership and to get involved in the PMCA process and in applying ideas of innovation.

- 2 Share insights gained about innovation processes in value chains, specifically regarding what has gone well, and what ought to be strengthened in new PMCA applications.
- 3 Define strategy and activities to consolidate the innovations and stimulate new ones.

- Workshop Content:**
- Evaluation of PMCA and expected impact pathways
 - Innovation System concepts
 - Keeping track of gender-responsive value chains developed during the PMCA
 - Planning of activities relating to post-PMCA

Suggested Duration: 1 day

Suggested Structure of Workshop 4 Sessions:

Day I

- Session 1:** Evaluation of activities since final event of PMCA. Assessment of potential impact pathways and new opportunities for collective action (differentiating commercial, technological and institutional innovations).
- Session 2:** Identification of key internal and external factors that influence and positively drive the innovation process.
- Session 3:** Definition of roles for the different actors (owners of the innovations, other market chain actors, supporting R&D actors, policy makers).

Session 4: Definition of support needed and what support can be provided.

Session 5: Planning of new activities to support the innovation process.

Note: This last workshop have to be conducted with the market chain actors previously involved in the PMCA process; this will definitely helps to sensitize them for their role and plan the support and future action together.

Workshop 4 - Agenda

Time	Item	Responsible person
8.30-8.50	Welcome and introduction to the workshop, revisiting the agenda	Representative of R&D organization
8.50-9.30	Presentation and discussion of activities since PMCA final event	PMCA facilitator and R&D organization, PMCA actors
9.30-10.30	Group work: Assessment of potential pathways and new opportunities for collective action (differentiating commercial, technological and institutional innovations)	Participants
10.30-11.00	Coffee Break	
11.00-12.00	Presentation and discussion of potential innovation pathways	Participants
12.00-13.00	Group work: identification of key factors (internal and external) that influence and drive the innovation process	Participants
12.30-14.00	Lunch	
14.00-15.00	Presentation of key factors and discussion of how to positively influence them with specific support	Facilitator
15.00-16.00	Definition of work plan	Facilitator

ANNEXES

Examples of tools application



Annex I. List of suggested tools to be used for each training workshop and PMCA phase

Phase	Workshop		Tools
	Number	Duration	
Phase 1	1	1 days	SWOT Analysis (User's Guide pg.38) Gender-Sensitive Impact Filter (tool 1) Gender Organizational Assessment of Partner Organization (tool 2) Qualitative Assessment of the Market Chain (PMCA Trainer Guide, pg.41, Spanish version) Gender-Sensitive Value Chain Mapping (tool 3)
Phase 2	2	4 days	Gender-Based Constraint Analysis and Planning (tool 4) Focus Group Research (tool 5 User's Guide) Marketing Concept Development (tool 6 User's Guide) Business Plan and Cost-Benefit Analysis (gender-sensitive) (tool 7 User's Guide)
Phase 3	3	3 days	Focus Group Research (tool 5 User's Guide) Gender Risk-Benefit Analysis (tool 5)
After Phase3	4	1 day	Assessment of potential pathways and new opportunities for collective action (pg 117 Trainer Guide Spanish version) Identification of key factors that influence and drive the innovation process (internal and external) (pg 125 trainer guide Spanish version)

Annex 2. Example of application of tool 2: Gender Organizational Assessment of Partner Organization

Resume of interviews held with the NGO PELUM, UGANDA. Date: April, 2015 - Central and West Region, Uganda - Pineapple value chain.

Categories and Indicators

ANSWERS

Section A. Institutional knowledge and awareness on gender issues and capacity to develop and implement gender-sensitive interventions

	Yes	Some	No	Don't know
<p>1 Role of Institution in supporting the Value chain: concrete example.</p>				
<p>2 Built-in mechanism such as gender policy/strategy to integrate a gender perspective in organization and intervention</p>	<p>Yes X</p>			
<p>Pineapple: groups implementing are mixed groups. Implement through partners. Strengthen their capacities to analyze gender issues along the value chain. Give grants, models such as Gender Action Learning System (GALS), capacity building on gender.</p>	<p>Gender policy that guides the way PELUM mainstreams gender. Get more involved in gender related work (GALS). Coordinating role with partners. Have an element of gender and VC (injustices in the value chain). Capacity enhancement of members in that methodology.</p>			

3	Evaluation of the outcomes of interventions aimed at improving gender equality through policy, strategy or specific interventions targeting women	March: showcase exhibition of GALS. Documentary and photo-story book with testimonies. Household work better together, decision making and sharing income from marketing; enhanced gender relations at human level and cooperatives.	Good X	Partially good	Not so good	Bad					
4	Evaluation of organization's awareness and understanding of gender issues in value chain development	Trainings for staff. Do gender analysis of their programs	Good	Some X	Limited	Don't know					
5	Gender balance in organization	15 staff 9 women Management: 3 of which 2 are women Mid-management: women (4 officers of which 3 are women) Assistant: 4 (2 are women) Support: 1 woman and 2 men Young women? Most staff in the same age group	Men=women	Few women	No women	More women than men X					
6	Position/roles of women in the organization	2 women part of management team: provide oversights for operations of country secretariat, report to the Board regularly. Program management. Financial resources.	Management X	Administration	Technical	Secretary					
7	Gender responsiveness of the services offered by organization	Access to social and financial benefits: • HR policy • Gender policy: maternity leave 60 working days	Yes X	Some	No	Don't know					

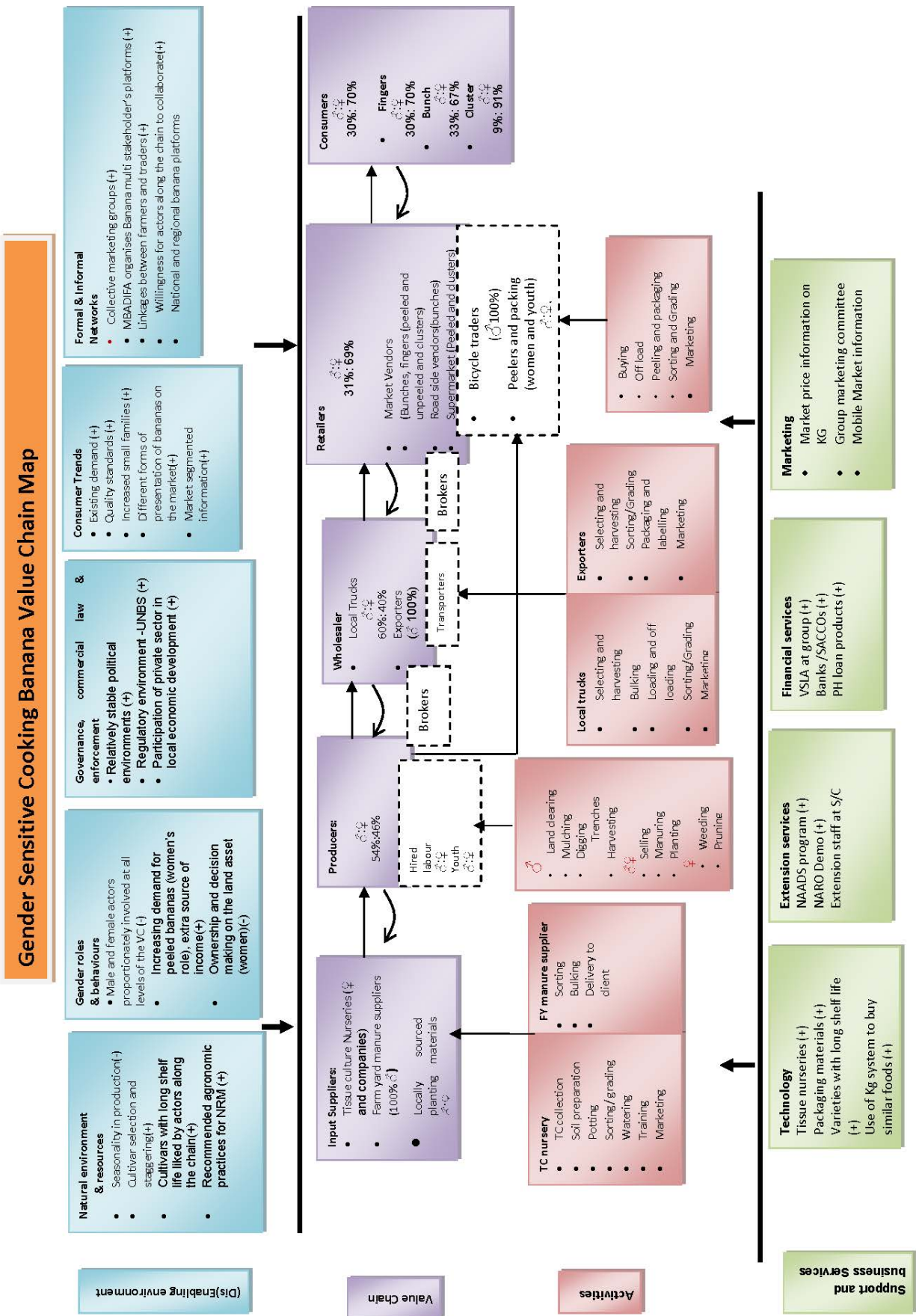
	<ul style="list-style-type: none"> • Pay for costs of nanny when nursing mother goes to the field; support for nursing mothers when organizing events • Paternity leave: 5 working days • Health insurance: for staff but not spouses and children • Flexibility of sick leaves to take care of children • Annual leave • Salaries, provident fund (percentage contributed by employer on top of Social Security) 					
Session B. Organization's knowledge on women's and men's roles along the value chain and gender-based constraints						
8	Self-evaluation of knowledge on gender roles	On farm activities: roles are shared Marketing done by men (who decides to sell, prices?): no info Sharing the proceeds: don't know	Good	Fair X	Limited	No
9	Awareness of gender inequalities and constraints in VC (1) from production to commercialization	Men: limited assets (land, finance), depending on their status Women: key issue is access to land; no power to decide where to plant, how much; women don't control the land, men dictate on how to spend proceeds Access to credit: women don't have required collateral to access	Women face a lot of constraints X	Women, they face some	They don't face any	I don't know

<p>10 Representation of women in associations/farmer organization and constraints</p> <p>Who is more represented in leadership positions?</p>	<p>Transporting products to market and negotiating prices: mode of transport; men have means of transport (bike, motorbike); while women have no access to market information neither skills to negotiate</p> <p>Men dominate the leadership and inter-actions.</p> <p>They mainly dominate the marketing, and have better negotiating skills.</p> <p>More mobility and knowledge on markets.</p> <p>Access to information.</p> <p>Better placed to decide who is to lead.</p> <p>Farmers and traders: dominated by men: moving with trucks</p>	<p>yes, women are underrepresented</p> <p>X</p>	<p>I partially agree</p>	<p>no</p>	<p>I don't know</p>
<p>Section C. Organization's understanding and knowledge of men's and women's access to resources</p>					
<p>11 Gender differences in access to assets and resources in region (land, irrigation, technology)</p>	<p>Men inherit land; access issues</p> <p>Women don't own land</p> <p>Water: both have access to simple technology (drop-to-drop) but not to pumps</p> <p>Technology: mainly men</p> <p>Men are better able to get credit and purchase equipment</p>	<p>Yes</p> <p>X</p>	<p>Some</p>	<p>No</p>	<p>I don't know</p>
<p>13 Gender differences in access to information and education</p>	<p>Men have more access, more time to go for training</p> <p>They have radios and time to listen to educational information</p>	<p>Significant differences</p> <p>X</p>	<p>Some differences</p>	<p>No differences</p>	<p>Don't know</p>

	Good	Fair	Poor	Don't know
13 Women's access to value chain support services	<p>Women don't have same access as men. Policy environment doesn't bring out the gender aspects. Financial services: hardly any products favorable for women when they don't have access to land. Very few institutions have developed gender-sensitive products The way communication is conveyed, not gender sensitive (channels of information, locations, etc.) Business development services: Some efforts to target women, but women still have constraints that keep them back</p>	X		
14 Gender sensitivity and responsiveness of BDS and institution in general: timing, location, affordability, content, geographical scope.	<p>Yes</p> <ul style="list-style-type: none"> • Depends on the service. • e.g. access to credit; some have designed financial products but these are few compared to usual services. • The way the service is packaged (form, guarantee, etc.) • Literacy levels: women less educated, less able to interpret that information. Doing business. 	Some X	No	Don't know
Section D. Organizations' knowledge and understanding of women's leadership and ability to benefit from VC interventions				
15 Women's participation in organization or farmer groups as members	<p>Yes X</p>	Some	No	I don't know

16	Women's participation in meetings	Depends on groups, in some groups, women are the majority but the chair person is a man, Or coordinator is a man	Same as men X	Less than men	More than men	I don't know
17	Evaluation of women's voice and vote in meeting	Women are active, they express their opinion, they are articulated, We just visit once in a while	Same as men	less than men X	Not at all considered	I don't know
18	Evaluation of women's leadership in farmer groups	Members are gender aware and take issues to farmers; some female treasurers/secretaries Haven't come across situations where leadership is male dominated	Low	Fair	Average X	Important
19	Gender-sensitive statutes, such as quotas, etc. to guarantee women's access in these organizations	Some have their constitutions and give room to women	Yes	No X		
E. Organization's knowledge and awareness on women's ability to influence decisions in spaces of power						
20	Capacities of women to influence collective decisions regarding the value chain (women's participation in multi-stakeholder platforms and processes)	<ul style="list-style-type: none"> Some women are outstanding, and bring in their issues; visits, regional events; Pick laws outstanding at regional levels; women have capacities, if they are empowered they can play a significant role in terms of influencing policies; takes time. 	Low	Fair X	Average	Important
21	Suggestion for women's empowerment in value chain and public space How to get more women to participate in advocacy	<ul style="list-style-type: none"> Strengthen women's capacities as a starting point Capacity building, empowering them with skills and information, involve the men so as not to antagonize the family. 				

Annexe 3. Example of application of tool 3: results of a Gender-Sensitive Mapping of the Cooking Banana Value Chain



Annex 4. Example of application of tool 4: Gender-Based Constraint Analysis and Planning

Identification of gender-based constraints for small farmers in a sweet potato market chain, Uganda (2014). Example extracted from the workshop on Orange Fleshed Sweet Potato (OFSP) - Small-Scale Producer - "Gender in Value Chains and Business Planning" - CIP, Entebbe, April 2013.

Table 1/tool 4. Identification of gender roles, responsibilities and constraints

Activities carried out by chain actor	Roles and responsibilities low=x, medium=xx, high=xxx				Resources or service needed to carry-out the activit	Constraints that limit access to and control of resources			
	Male	Female	Youth			Male	Female	Youth	
			Female	Male				Male	Female
Site Selection	XX	X			Land		Inadequate access to land		
Land preparation	X	XX							
Planting		XXX			Manure		Limited access to manure		
Weeding		XXX							
Harvesting		XX							

Table 2/tool 4: Prioritization and analysis of gender-based constraints to plan actions - Small-Scale OFSP Producers

Gender-based constraint(s)	Consequence	Cause	Actions
Value chain actor: Small-scale OFSP producer			
1. Women small-scale producers face challenges accessing land	Poor access to land and manure by female producers affects production (yields) and supply to other actors along the chain.	Because of cultural norms, men are the main decision makers over the use of resources such as land. Men prefer to use land for what they consider commercial crops, such as coffee or pineapple.	Conduct sensitization and communication for behavioral change to bring men on board and recognize OFSP as a commercial crop.
2. Women producers face challenges accessing manure	Lower yields.	There is competition over use of manure for food and cash crops. Men usually decide on use of manure. When it is not available at household level, manure needs to be purchased and women do not necessarily have the financial resources to acquire it.	Link up producers with financial institutions offering gender -responsive products and services. Organize women in producer groups to facilitate collective access to land and resources

Annex 5. Example of application of tool 5: Gender Risk-Benefit Analysis

From the assessment for vine root producers of sweet potato value chain, in Gem and Ugunja, Kenya (2014).

Key: (+) = positive effects. (-) = negative effects

Table 2/ tool 5:

Actors	Work	Income	Social / Market Position	Othe
Male vine producer	Male trained, contribution to farm labor, high quality vine production (+)	Increased incomes, increased power control on household resources (+)	Diverted attention, household conflicts over resource control (-)	Status of sweet potato as a poor man's crop elevated (+)
Female vine producer	Added responsibility apart from the general household chores at initial stages (-)	Increased incomes-living standards improved, investment in other development projects (+)	Elevated status - can be leaders, power to control/lead, empower/involve other women (+) Female displacement (-)	Increased household food security(+) Women can use smaller roots and leaves from the vine plots for food, (+) Women displaced-not able to cultivate other food crops, diverted attention (-)

Annex 6. Additional on-line training material supporting the present guide in introduction to gender mainstreaming in VCD

The presentations are available on-line at the links indicated below. Please, copy and paste the web links in your browser to access to the documents:

The training material has been developed by CIP researcher and /or consultants during field application and program interventions and it. It can be used or adapted for use in the PMCA Training Workshop presented in this guide.

- Gender Skits to introduce gender roles and their implications on VC development: <http://cipotato.org/wp-content/uploads/2016/04/SKITS-TO-INTRODUCE-GENDER-CONCEPTS.pdf>
- Power Point Presentation: Gender mainstreaming in PMCA and Value chain development project (phase I training): <http://cipotato.org/wp-content/uploads/2016/04/Gender-mainstreaming-in-PMCA-and-Value-chain-development-project.pdf>
- Power Point Presentation: Field program Example on Gender integration into OFSP Value chain development (phase I, 2): <http://cipotato.org/wp-content/uploads/2016/04/Field-program-Example-on-Gender-integration-into-OFSP-Value-chain-development.pdf>

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- CIP working paper. "Guidelines for mainstreaming gender in RTB value chains" Root, tuber and Banana program of CGIAR consortium.

LINKS TO RESOURCES ON HOW TO CONDUCT OPEN-ENDED OR SEMI-STRUCTURED INTERVIEWS AND DATA COLLECTION:

- Practical Tips for Conducting Gender Responsive Data Collection", by Bioversity International. <http://www.bioversityinternational.org/e-library/publications/detail/practical-tips-for-conducting-gender-responsive-data-collection/>
- How to do semi-structured interviews. <http://www.tools4dev.org/resources/how-to-do-great-semi-structured-interviews/>