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The role of women in the seafood industry

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The role of women in the seafood industry

by

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Women participate in all segments of the seafood industry, including fishing, farming, trading and selling, monitoring and administration. But the widespread lack of consideration for their role and work in the seafood industry is, in many respects, disadvantageous to them and ultimately bars them from participating fully and equitably in the industry.

The primary aim of this report is to increase awareness of business leaders and policy makers, to expand their knowledge and sensitization about the value women bring to the seafood industry, and to encourage them to consider each time they develop a new project or a policy: “Have we not overlooked women?”

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EXECUTIVE SUMMARY

Objectives

The Food and Agriculture Organization's GLOBEFISH Programme commissioned Marie Christine Monfort, economist and seafood marketing expert, to explore and shed light on a rather unknown aspect of the seafood industry: the participation of women.

This worldwide desktop study, the first of its kind, presents what is known, and what remains to be investigated in this crucial component of the seafood industry. The primary aim is to disseminate available knowledge and raise the awareness of policy makers and business leaders on the essential role of women in this industry and the inequity they experience. Some initiatives taken to reduce discrimination are presented in the last part of the report.

The desk work was carried out during the first quarter of 2015, based on extensive internet research.

Scarcity of data

On a global scale, quantitative and qualitative data on the participation of women is sparse and when it exists it may be of poor quality and only cover some segments of the industry. Thus, the knowledge and understanding of the very complex distribution of roles, power, access to resources and profits between genders are incomplete and vary greatly between regions and industry sectors.

Of the six countries (Republic of Croatia, the Arab Republic of Egypt, the French Republic, the Republic of Iceland, the Republic of India and the Republic of Senegal) studied in this report, only one collects sex disaggregated data over the full employment spectrum in the seafood industry, namely Iceland. Sociological, anthropological and economical studies on the role and power distribution between sexes are still rare. The quality of data varies greatly between countries and, interestingly enough, it is not linked to the level of economic development. Developing countries such as India and Senegal, for instance, offer rather good records because these important fishing and aquaculture nations have received the attention of gender sensitive development aid agencies. In contrast, the participation of women in the industry is still poorly documented and researched in most developed countries.

One in two seafood workers is a woman

When considering the seafood industry as a whole, with fisheries, aquaculture, seafood processing and all related services, women represent half of the total working population worldwide (World Bank, 2012; OECD, 2014). Women are essential contributors to this important food supplying industry and therefore critical agents for change.

Women participate in all segments of the industry, but to variable degrees. They constitute a high proportion of workers in subsistence aquaculture, in artisanal and industrial processing, in fresh fish trading and retailing, in environmental organisations, and occupy most administrative positions. On the other hand, there are very few women in industrial fishing and in leadership positions.

Cultural and societal constraints

Where information is available, there is evidence that women's participation is constrained or affected by strong cultural rules, robust societal conventions and even in some cases by discriminatory laws.

Women are barred from some seafood related jobs, such as going to sea on-board fishing vessels. They may be deprived from ownership rights, and thus hindered from running fish farming businesses, or they may not be allowed to access finances and insurances services. Their limited access to capital limits their access to modern and competitive technology in fishing, farming, processing and storing fish, and limits their capacity to upgrade their knowledge and skills.

Lack of consideration for women's role and work in the seafood industry leads policy makers to develop policies that are disadvantageous to women and ultimately bar them from accessing public resources.

Signs of further deterioration

Ongoing global changes are altering drastically the sharing of human, financial and natural resources on a worldwide scale, with a disproportionate effect on women. Research carried out on this topic indicates that women in coastal areas depending on seafood as a source of revenue or a source of food are particularly affected by these changes. Globalisation and its hunger for cheap inputs including labour, the widespread decline in marine resources, the deterioration of marine coastal habitats and climate changes, among other events, generate severe consequences on fragile populations, among which women are numerous.

Some initiatives

The United Nations prompted political action in this area by organising the Convention on the Elimination of All Forms of Discrimination against Women in 1979, followed by the World Conferences on Women, the Beijing Declaration and the Platform for Actions. In phase with its mother institution, the FAO participates in the production and dissemination of research related to women and gender in food production including seafood. This report exemplifies these efforts. Moreover, in 2015, FAO GLOBEFISH is working on setting up a platform for professional networks in the seafood industry.

Besides these global projects, local projects are being developed, implemented and monitored either by development aid organisations or local not-for-profit associations.

We have not found a single project initiated by private business operators in the seafood industry, suggesting that they are not aware of, or not sensitised to this issue.

In conclusion, it is striking to see that, whichever country or industry segment is examined, the lower the remuneration and the lower the gain generated along the value chain, the more numerous women are there. Conversely, the better the working conditions or capital revenues, the lower is the number of women. Women are present in all segments of the industry yet invisible; they are efficient yet often underpaid; they are less endowed to face adverse external events. They do not receive institutional support in equitable proportions compared to men, although they are a key element in the necessary changes.

Over the past decades, researchers and development experts have produced these evidences, but this knowledge has not been disseminated among seafood professionals, and hardly more so among public officers.

The aim of this report is primarily to increase consciousness of business leaders and policy makers, to enlarge their knowledge and sensitization about the value women bring to the seafood industry, and encourage them to consider each time they develop a new project or a policy: *“Have we not overlooked women?”*

Twenty years after the Beijing World Conference on Gender Equity, further efforts need to be made in most developing and developed countries by public and private agents. This work demonstrates that the seafood industry is, by far, no exception.

1. INTRODUCTION

1.1 RATIONALE AND OBJECTIVES

There has been in the past decade an increased interest in women's participation in economic and social affairs (OECD, 2011; FAO, 2012b; Elborgh-Woytek, 2013) and a widely accepted recognition and growing understanding that giving women equal chances will promote fairer and more prosperous societies. But what do we know about the role of women in the seafood industry?

The objective of this report is to shed light on the participation of women in the seafood industry worldwide and on what is being done by the public and private sectors to improve women's position and recognition. By seafood industry we refer here to the industry at large including fishing, seafood farming, processing, trading and support activities and services.

1.2 METHODOLOGY AND ORGANISATION OF THE PAPER

This desktop research was carried out over two months in early 2015. It is based on extensive internet research and the invaluable help of specialists who helped to spot the important literature.

The report is organised in two main parts.

- Chapters 1 and 2 present the results of an extensive literature review, including research studies and public reports from anthropological, sociological and socio-economic sources. What do we know, what has been evidenced and what is being done to improve women's situation in the seafood industry?
- Chapter 3 presents a compilation and analysis of data from a cross section of six countries: the Republic of Croatia, the Arab Republic of Egypt, the French Republic, the Republic of Iceland, the Republic of India and the Republic of Senegal. The sample combines countries with different cultural contexts, diverse types of development models, from artisanal to industrial, from commercial to subsistence oriented, from import-substituting industrialization to market-led export-oriented growth.

This research commissioned by FAO GLOBEFISH intends to provide seafood policy makers and business operators with a greater understanding of women's participation in the seafood industry and raise their awareness about the need to recognise women's role in the industry.

2. WOMEN'S ROLE IN THE SEAFOOD INDUSTRY

In this chapter, we document sector by sector, the state of knowledge on the participation of women in the seafood industry and the specific constraints and discriminations they face. We conclude the chapter by discussing emerging opportunities and threats.

2.1. SOURCES OF INFORMATION

2.1.1. The central role of the FAO

On the grounds of both gender equity and maximising socio-economic development, the United Nations has been active in considering women's participation in the economy as a fundamental factor for global growth, poverty alleviation and population wellbeing. The Food and Agriculture Organization of the UN was a pioneer at infusing this philosophy in fisheries and aquaculture development. From FAO's perspective, the objective of gender integration in aquaculture and fisheries is to harness and maximise the respective skills of women and men toward optimal food productivity, quality of life and food and nutrition security, keeping in mind that the FAO mission is to eliminate hunger.

As early as in 1987, the FAO organized the first global workshop on Women in Aquaculture. In April 2011, it organised in Shanghai, China a workshop on future directions for gender in aquaculture and fisheries action, research and development (FAO, 2012b). For the first time, gender was highlighted as a special theme in the 2012 FAO State of World Fisheries and Aquaculture report (FAO, 2012a). One of the most noticeable achievements of FAO is the adoption in 2014 of the Voluntary Guidelines on Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication – referred to as the SSF Guidelines – as the first major fisheries legal instrument that includes gender equality aspirations (FAO, 2014a). This report falls into the category of global sensitization efforts carried out by the institution.

All these events have stimulated the production and dissemination of specific gender sensitive data, reports, and articles and widened the knowledge on women's participation in this industry.

2.1.2. Academic research

Over the past thirty years, a range of anthropological and sociological studies have shown the complexity of gender relationships within seafood related industries. The most detailed information is available for aquaculture (FAO, 2007). Comparatively, little has been done in the field of wild resource exploitation. This may be due to the widely accepted – yet wrong – perception that the involvement of women is limited in fisheries. The low interest in this field may as well be due to the relatively limited prospects for growth.

Comparatively, very few research studies have been carried out by fisheries' economists. The database of publications monitored by The International Institute for Fisheries Economics (IIFET), the global association of fisheries economists, includes¹ 39 articles on gender related issues i.e. 2.4 percent out of the 1 687 articles in the data base. By comparison, climate change was mentioned in 401 (23.8 percent) of all articles. Out of the

¹ in February 2015.

39 articles, 29 (74 percent) have been published in 2012, the year that for the first time the IIFET conference highlighted gender in a substantive way. So far occasional gender/women's studies (less than 10) had been presented in the past conferences. Placing gender/women's issues on the IIFET Conference agenda as a special focus item will provide a clear stimulus for more research. This opportunity should not be missed in the 2016 IIFET edition, which will take place in Edinburgh, Scotland.

Whether in economics or in socio-anthropology the vast majority of research (partly funded by aid agencies) explores the situation of women and analyses gender issues in developing countries. This geographical focus reflects the needs that development agencies and donors have to better understand in the articulation of roles between men and women. By contrast, it highlights the relatively poor attention given to the issue by developed countries.

2.1.3. Associations and NGOs

The International Collective in Support of Fishworkers (ICSF) is an important contributor to research and information on women and gender in fisheries. This global Republic of India-based association convened in July 2010 an important workshop on Women in Fisheries entitled "Recasting the Net: Defining a Gender Agenda for Sustaining Life and Livelihoods in Fishing Communities".

Some global environmental and development NGOs such as Oxfam and WWF, have occasionally studied the situation of women in coastal areas (Oxfam, 2005; WWF, 2012).

Numerous local projects addressing women or gender issues have been undertaken. The restricted dissemination of their goals, means and results prevent us from making a comprehensive list. For example, in Senegal, donor agencies are active in Senegal maritime development, and many projects are directed at women. The projects are designed for enhancing women's education, promotion and empowerment. Among the most recent projects (2005–2015), the Japan International Cooperation Agency runs a capacity enhancement project for women and children; a French research institute (IRD) runs a project to enhance women's knowledge and capacity to exploit and add value to shellfish; the USAID/COMFISH started a project that introduced to women pioneers eco-friendly fish processing methods.

2.1.4. The industry

Throughout the reviewed literature, no mention was made of work or studies ordered by the industry itself. The closest is the study that the Icelandic Association of Women in Fisheries ordered from a consultant firm for gauging the involvement of women in the Icelandic fisheries industry and related support activities. The study is ongoing as this report is being published (March, 2015).

During the 5th Gender in Aquaculture and Fisheries Conference that took place in Lucknow, India in 2014, where about 80 seafood gender specialists gathered, the need for more research in the field was advocated by all. The critical lack of gender expertise in the seafood industry was also acknowledged.

Data are lacking

Comprehensive and accurate statistics describing the number and sex of workers in the seafood industry are lacking.

What is encompassed?

Depending on sources, what is considered as part of the seafood industry varies greatly: where does the industry start?; where does it end?; which input/ output production and support activities are measured?. This hinders comparison and summing up. For instance, in 2008 information provided to FAO from 86 countries (FAO, 2008) indicates that, “5.4 million women worked as fishers and fish farmers in the primary sector”. In a SOFIA 2012 report (FAO, 2012a), it is stated “More than 100 million people now depend on the aquaculture sector for a living, either as employees in the producing and support sectors or as their dependants.” It is also stated that “women accounted for at least 15 percent of all people directly engaged in the fisheries primary sector in 2010” and “Women have an important role in fisheries and aquaculture. Worldwide, fish products support the livelihoods of 520 million people, many of whom are women” (OECD, 2014)

What data?

Sex disaggregated data is essential and based on the examples we studied and the existing literature, this imperative data is lacking in most countries.

Moreover, the data is far from sufficient for policy makers to design gender equitable fisheries and aquaculture policies. It is important to understand the complex social construction of gender; to appreciate who captures the financial and natural resources, who has the decision power.

Figure 1. Who commissions studies on women in the seafood industry?



2.2. MAJOR FINDINGS BY SEGMENTS

Women are important contributors to the seafood industry. There is evidence that, worldwide, one in two seafood workers is a woman.

Participation in fisheries and post-harvest activities varies much between countries. Table 1 below shows that, when considering fisheries and post-harvest activities, women represent 73 percent of the total workforce in the Federal Republic of Nigeria and 4 percent in the Republic of Mozambique. In the Republic of Iceland, the figure reaches 33 percent; it is 21 percent in the European Union.

Table 1. Women in the fisheries workforce (harvest and post-harvest)

	Total Workforce '000	*Percentage women
Nigeria	6 500	73%
India	10 316	72%
Cambodia	1 624	57%
Ghana	372	40%
Iceland ⁽¹⁾	9	33%
Senegal	129	32%
Brazil	493	30%
European Union (Member Organisation) ⁽²⁾	66	21%
China	12 078	19%
Bangladesh	3 253	5%
Mozambique	265	4%

⁽¹⁾ Harvest and Processing National Icelandic Statistics, 2013. ⁽²⁾ EU data.

* Full- and part-time; fishing and postharvest activities.

Source: World Bank, 2012, The Hidden Harvests: the global contribution of capture fisheries.

In the following sections we review the contribution of women, successively in the following industry segments:

- fishing,
- aquaculture,
- post-harvest activities including seafood processing;
- support activities.

2.2.1. Fishing

On average, 47 percent of the 120 million people who work in the capture fisheries and post-harvest sectors² are women. If the People's Republic of China is excluded, the average proportion of women fishers and fish workers approaches 60 percent (World Bank, 2012).

The assessments provided to FAO report that women accounted for more than 15 percent of all people directly engaged in the fisheries primary sector in 2012, and that the proportion of women exceed 20percent in inland fishing (FAO, 2014b).

Numerous studies that we compiled reveal common dominant traits. Women are much engaged in small-scale fisheries, which demand little in terms of capital and technology and are compatible with their family obligations. They are seldom engaged in industrial fisheries.

Fishing on shore

Collecting benthic animals on the shore is done on the coast line of all continents. Women are occupied in gleaning of molluscs, crustaceans, small fish, algae in the intertidal zone, in shallow waters, and on reefs. In temperate waters (Japan, Republic of Korea, Europe, and Mediterranean countries), they are mainly concerned with bivalves collection. In warm water areas they collect *bêche-de-mer*, trochus, black pearl oysters and other bivalves, cephalopods, coral reef fishes, etc. These activities are undertaken with no or very limited equipment and require little capital investment. Instruments utilised include knives, wooden or metal sticks, kerosene or gas lamps to fish at night, nets or traps, baskets or bags.

These activities provide a subsistence source of protein (reef fish, molluscs, seaweed, crustaceans), and play a part in the family diet balance and wellbeing. In the Independent State of Samoa, women are responsible for collecting most of the marine bivalves and other invertebrates and, as such, provide close to 20 percent of the per capita seafood consumption of 71 kg per year (Lambeth, 2014). In other cases, shore gleaning is a source of complementary or primary source of income. Their contribution to fisheries production remains yet largely undocumented and unsupported (Lambeth, 2014). Their fishing effort and its impact on the biomass is simply ignored.

Small-scale (artisanal, subsistence) fishing

The participation of women in artisanal fisheries varies from country to country, and takes different forms. It ranges from fishing themselves or taking care of the fishing equipment and other necessary inputs utilised by men. They may as well participate in diverse ways to the financing of the activity.

In many countries, women go fishing in small boats for short trips in lakes and rivers. For example, in the Republic of Benin, the Kingdom of Cambodia, Republic of the Congo, the Republic of Mali, and the Kingdom of Thailand, women fish or collect fish on lakes using their own boats (World Bank, 2012). In the Salonga area of the central basin of the Congo

² In most reports the term of “fisheries and post-harvest operations” does not detail what and if the following activities are included: preparing input and fishing gears, off-loading fish from vessels, first hand selling, second hand selling, processing, packaging.

river, women use basket traps to fish the flood plain and river margins (Dugan, 2010). In the Nam Ngum Reservoir in Lao PDR both women and men go fishing in motorized boats and use gill nets. Women control the boats, pull nets and take fish from the net while the men dive.

It is very common along the coast of West Africa that women finance fishing operations run by men. Some women own boats or gears which they give to fishermen in exchange for privileged access and privilege price of the fish captured. Omojowo noted that 70 percent of women in the area studied started fishing business with capital from their own savings (Omojowo, 2005). In the Republic of Guinea, most energetic women advance money for the building of pirogues, engine repairs, and the living conditions for men at sea (Satia and Wétouhossou, 1996).

In Canada, women play an important role in inshore family enterprises, maintaining accounts and, in some cases, subsidizing fishing activities through their earnings on land (Neis, Abord-Hugon and Larkin, 1996).

Role of women in European fisheries

Unpaid work by women to support family fishing enterprises has long been seen as significantly important. The activities in which women are involved fall into at least five main categories.

Overall management: essentially allowing the spouses to concentrate on fishing *per se*, relieving them of all the financial, compliance/fiscal, supplies sourcing, crew/staff management and marketing responsibilities and duties.

Communication: providing an essential communication link whilst the spouse is at sea, formerly a critical requirement but now one made less so by communication technology – sea-going fishermen can communicate directly with better radios, mobile phones, satellite links and on-board fax or internet.

Book keeping: keeping track of expenditure and revenues, dealing with the bank and state on fiscal or other requirements.

Marketing: from maintaining a marketing network, keeping track of current prices to actively selling fish, finding the best deals and proactive market development.

Practical backup: at the lower end of the scale, women provide essential routine logistical functions, picking up equipment and crew (traditionally many fishermen do not drive) etc.

Source: MacAlister Elliott and Partners, 2001

Industrial fishing

Industrial or capital intensive fishing conveys the very popular image of a massive boat, rough sea and virile men on-board. The truth is that most people working on industrial fishing vessels are men; the proportion of women remains very limited.

In the Republic of Iceland, Canada, Alaska, the French Republic, the United States of America to only mention few countries, some women work on-board industrial trawlers and large sized seiners. They work on the processing floor on-board factory vessels (Lentisco and Lee, 2014). In Japan, the crew of powered vessels used in the fishing industry is

composed of 12 percent women (De Silva, 2011), in the Republic of Iceland, 10 percent (www.statice.is).

The data are scarce, and we can hardly draw a global picture but the few documented examples demonstrate that women are rare on-board industrial vessels.

Yet their presence as key support to men at sea is evidenced (Framgoudes, 2013). Women run various tasks related to the occupation of their husbands or partners from boat cleaning, net mending, book keeping, managing the business, etc. Non-declared, not paid in most cases, this indispensable but invisible participation raises the question of women’s employment status, which has received different attention from legislators, according to the country or region. In the French Republic, the status of “collaborative Spouse Status” was introduced in 1997. This law was “*a major breakthrough for the formal recognition of women’s contribution to the family fishing enterprise*”³.

2.2.2. Aquaculture

On the global level women’s participation in aquaculture is estimated at 70 percent of total workforce, all production modes included. Again, this figure has only an indicative value. It is based on indications by country which cover different domains; in some cases processing operations are included, in others they are not (Hishamunda, 2014).

Table 2. Proportion of aquaculture employees by gender in different regions in 2009

	Percent of women in aquaculture production ⁽¹⁾	Percentage of aquaculture workers by region ⁽²⁾	Percentage women in total
Total est.	70%	18 500 000	13 088 500
Asia	72%	18 000 000	12 960 000
Americas	25%	250 000	62 500
Africa	20%	230 000	46 000
Europa	20%	100 000	20 000

Sources: ⁽¹⁾ 2009 Data: Hishamunda *et al.*, 2014; ⁽²⁾ 2010 Data: SOFIA, 2014.

The proportion of women depends on production mode and the type of occupation. Most of the women are in small-scale low capital intensive operations, in charge of all tasks. They are less present in modern industrial units, where men dominate.

Small-scale aquaculture

Women are heavily involved in small-scale aquaculture. These close-to-home operations allow them to carry out both the farming and the household caring activities.

Typically, in Asia where small-scale aquaculture is common, women are reported to constitute 33 percent of the rural aquaculture workforce in China and 42 to 80 percent in freshwater and cage culture in Indonesia and Vietnam. Himanshu in quoting Nandeeshha (Himanshu, 2014) reported that in Cambodia, ponds in which women carried out 50 percent or more of the tasks associated with the culture of fish showed higher yields than other

³ Framgoudes, Pascual-Fernandez, and Maruna-Pintos (2014).

ponds. In India, culture of ornamental fish which requires very little space, skill and time is dominantly carried out by women in the backyards of households. A carp-rearing project launched in Nepal, is run effectively by women, report De and Pandey (2014). In Thailand women are involved in most aquaculture tasks, including taking care of ponds, cleaning, purchasing fingerlings, feeding fish, measuring pH, checking the quality of the water, keeping records, etc. Some women are owners, co-owners, or managers of the business (Satapornvanit, 2014).

According to Luomba J. O., women participated in all phases of work in fish farms in Tanzania including the construction of ponds, cleaning the pond, sorting fingerlings, feeding the fish, harvesting the fish, etc. Their capacity to run a fish farm was well evidenced.

They are very active in small-scale aquaculture, but what Abu Hatab reports for the Arab Republic of Egypt, “*much of women’s work is informal, unpaid and unreported*”(Abu Hatab, 2014), is common in developing as well as developed countries.

Industrial aquaculture

Industrial aquaculture is the most successful segment of the seafood industry worldwide in terms of production growth and employment created. From the fragmented data we obtained, this domain seems to be dominated by men.

According to the Scientific, Technical and Economic Committee for Fisheries⁴ (STECF, 2012), 24 percent of the EU aquaculture sector employees are women, measured in full time equivalent jobs in 2010. In Norway, women represent 13 percent of the number of full time equivalent employees in fish farming in 2014⁵. In Chilean aquaculture overall, less than 10 percent of employees are women in marine (salmonid) aquaculture⁶.

2.2.3. Post-harvest activities

Seafood processing

Whatever the type of processing whether fresh fish or frozen fish cutting, or putting in tins and whatever the input transformed (whether finfish, shellfish, or molluscs), women represent the dominant proportion of the labour force in seafood processing. A recent World Bank survey (World Bank, 2010) suggests that 85.5 percent of fish processing workers worldwide are women. A FAO report considers that as high as 90 percent of all workers in secondary seafood activities, such as processing, are women (FAO, 2012a).

⁴ The STECF is a body, whose members, all highly qualified scientific experts having competence in the fields of marine biology, marine ecology, fisheries science, fishing gear technology and fishery economics are nominated by the Commission.

⁵ Statistikk Sentral Byrå, www.ssb.no/statistikkbanken/SelectVarVal/saveselections.asp

⁶ Hishamunda, N. (2014).

In Europe, the fish processing industry employs 150 000 people, evenly divided between genders (56 percent women), with noticeable differences by country (Republic of Poland 68 percent women, French Republic 56 percent, the United Kingdom of Great Britain and Northern Ireland less than 40 percent) (STECF, 2012). In the Republic of Iceland, women represent 48 percent of the 5 000 fish processing workers⁷.

In Scotland, Australia, North Carolina and Japan scallop shuckers are most likely to be women. They are reputed to be faster than men and to ensure the highest yields, measured in weight shucked in a given period, such as an hour⁸.

In Africa, women play an important role in processing and trading activities. Along the west coast of Africa, the majority of fish processors are women. They are in charge of multiple responsibilities: ensure availability of fish throughout the year, especially during the lean season, through preserving (smoking, salting, curing) the fish, processing fresh fish directly bought to fishermen before selling them locally, and feeding their family (Okorley and Kwartan, 2000).

In Cambodia 80 percent of workers in fish sauce factories are women (Dugan, 2010). Until recently, at the cannery in Western Province, Solomon Islands, approximately 26 percent of workers were women fish processors (Nelson and Tuara, 2000, cited in Lambeth 2014). In Fiji, women make up the bulk of cannery workers (90 percent) and in other than tuna canning establishments, they comprise between 30 and 80 percent of the workers (Lambeth, 2014).

A large-scale study along the Indian coast evidenced that the shrimp processing industry relies heavily (90 percent) on women labour force in the shrimp peeling industry. In other seafood products processing in India, they represent 70 percent of total labour force (Dhanya, 2013; Nikita, 2007; Kuriakose and Jayasankar, 2007).

Women workers who make the seafood processing industry function all over the world are chosen for a range of reasons. Women are perceived to be trustworthy, dedicated, meticulous, flexible, compliant, quality minded and cheaper than men. The apparent contradiction of high productivity and efficiency and lower wage needs to be further investigated.

In numerous cases, women work in conditions sometimes bordering blatant exploitation, with low pay, and little or no welfare and social security (Williams, 1998). Their absence in intermediate (Lambeth, 2014; Hishamunda, 2014) and high leading positions (Undercurrents News, 2014) is to be questioned as well. This addresses the crucial question of women's bargaining power, or better, the lack of it.

The table below summarises the participation of women in fishing and post-harvest activities.

⁷ National statistics www.statice.is

⁸ Personal observations.

Table 3. The participation of women in fishing and post-harvest operations

	Small-scale		Large-scale		Total
	Marine	Inland	Marine	Inland	Marine + Inland
Total workforce	52	56	9	2	119
Percentage women	36%	54%	64%	28%	47%
Developing countries	50	56	9	1.5	116.5
Percentage women	36%	55%	66%	26%	47%
Developed countries	2	Very few	1	Very few	3
Percentage women	43%	44%	38%	Na	41%

Source: World Bank, 2012.

Selling locally, regionally and internationally

Once fish is landed, someone has to take care of its move down to consumers, in local, regional or distant markets⁹. In many cases, this someone is a woman.

Nigerian women are the backbone of fresh and dry fish marketing, explains Abiodun Oritsejemine Cheke, the Deputy Director in charge of Fish Trade, Federal Department of Fisheries, Federal Republic of Nigeria, Ministry of Agriculture and Rural Development, at the IIFET 2012 in the United Republic of Tanzania. *“They do vending in rudimentary fish markets as well as carry fish on head load sales, door to door”*. Nireka Weeratunge and Katherine Snyder (Weeratunge and Snyder, 2009) acknowledge that women dominate local fish markets in much of Africa.

In Asia as well, women are key players in seafood trading and selling. Most of the estimated 5-6 thousand fish markets throughout the lower Mekong basin are conducted by women (Dugan, 2010).

Yet in international trade fairs, where companies are represented by their leaders and commercial personnel, few women are present, though things have changed slowly over the past 20 years. As recalled Leena Nair, the chairman of the Marine Products Export Development Authority (MPEDA) *“the first few years as Chairman of MPEDA, when I visited all the seafood shows, I found that the shows were very male dominated. The few noticeable women were the ones in bikinis that exhibitors hired to attract attention. But the number is slowly increasing¹⁰”*. Though women are rare in selling at international level, trading companies rely on intense female expertise for their administrative, logistics, and assistance to managers’ tasks.

No global data quantify the number of women taking part in the segment but fragmented testimonies from Africa, Asia and even Europe confirm that they are significant participants in the seafood industry.

⁹ According to the FAO (2012), 38 percent of fish produced in the world was exported in 2010.

¹⁰ Communication during GAF5 at Lucknow, Republic of India.

2.2.4. Other related activities

Administration and government workers

No global data describes the population of women working in national, regional, or local administrations in charge of reporting, implementing aquaculture and fisheries and related activities. We only have indications that the representation of women may be high.

Professional associations

In each country professionals' associations at various levels participate in resource management, in the defence of professionals' rights, and in lobbying the public authorities. No global data describes the proportion of women attached to these professional organisations, thus a number of research studies (Lambeth, 2014; Fröcklin, 2013) describe their low presence and the weakness of their representation at national, regional or local level.

For instance, in the Republic of Madagascar, where women play a dominant role in exploiting the rich mangrove ecosystems, selling products from traditional fishing and working in processing factories, they are under-represented in professional meetings (AFD, 2014a). In Senegal, despite their large number of members, women associations have no negotiation power (Deme, 2014; WWF, 2012).

Women are not given the same opportunities to sit in meetings with their male colleagues, or with the administration or any other stakeholders to advocate for their rights and defend their specific interests. They are, in many cases, precluded from membership in professional associations (de Prick, 2013). In most countries, policies and decisions are taken by men who often disregard women's views and interests.

Quality inspection

No global data describes the population of female technicians in charge of seafood quality inspection, whether in public offices or attached to private premises, but their presence is real.

Environment activists

There is no global data describing the number of women in environmental NGOs but their presence is real and visible. The David Suzuki Foundation is an influential science-based environmental organization with an Oceans and Sustainable Fishing Programme which has been very active in aquaculture issues. Twenty-eight out of forty six staff members or 61 percent are women (Sloan, 2004). Human resource of the Marine Stewardship Council is rather balanced, with some 56 percent of all staff being women, all regional and global teams included¹¹. Some of the MSC national teams comprise solely women. This is the case for the bureau in Germany which comprises eight female out of eight employees and "*is one of our most efficient of all our national teams*" says MSC general manager Rupert Howes¹².

¹¹ Source: www.msc.org (80 women out of 142 staff members).

¹² Personal communication, March 2015.

Researchers, marine and social sciences

No data describes the population of scientists in the fields of marine and social sciences in connection with the maritime milieu, but their presence is obvious and visible. For instance, in Indian fisheries research institutes 25 percent of scientists are female. A study carried out in the Institute of Aquaculture in Stirling, Scotland showed that more than 80 percent of the professional staff are men, while women dominate in the technical and administrative fields (Rana and Choo, 2002).

Women associations

Women have always attempted to gather, to join forces and make their voices heard. One of the most ancient associations, the Norwegian Norges Fiskarkvinnelag, Norwegian fishermen association women's group was created in 1953 (Framgoudes, 2013). Women participate in discussions at board meetings of the fishermen's union, but do not have the right to vote, neither have they the right to participate in negotiations with the government, even though they are recognized by it (Korsrud, 1996).

In 2000, a Network of Latin American Women of the Fishery Sector was formed. Currently, the network has more than 300 members from 20 countries, including countries of other regions like the Kingdom of Spain and Republic of Mozambique. The objectives of the network are to identify the needs of women in fisheries; to provide information and training that facilitates the participation of women in the sectors; to detect, support and guide cooperation sources. The First Meeting of Focal Points of The Network of Latin American Women of the Fishery Sector was held from 5 to 6 October 2000 in Montevideo, the Eastern Republic of Uruguay. The event was jointly organized by INFOPESCA and FAO, with the main purpose of analysing the situation of Latin American women and their role in the fishery sector.

In the Republic of Senegal, seafood women professionals set up two organisations Fénagie Pêche and Fenatrans. Despite the large number of members (*circa* 10 000) they are said to lack negotiation power and political representation at national level.

In Europe, in 2006 professional women and researchers decided to join together at European level and created the AKTEA network¹³, the European Network of Women's Organisations in Fisheries, a transnational European association.

¹³ Framgoudes, K. 2013.

List of AKTEA members

Spain: Asociación Tyrius Valencia, Federación Galega de Redeiras Artesás, Red Española de Mujeres en el Sector Pesquero

France: Association d'Arcachon, Association Uhaina Saint Jean Luz, 2FM, Association des femmes des pêcheurs de la Méditerranée

Greece: Pan-Hellenic Union of women in fisheries (PEGA)

Italy: Associazione Donne nella Pesca PENELOPE-AKTEA

Iceland: AMPA - Association for Fishermen and Ship-owners Wives of Terceira Island

The Netherlands: VinVis- Vrouwen in de Visserij network Nederland

Portugal: Portuguese Fishers women network; Asociación de Mujeres en la Pesca en las Açores

United Kingdom: Northern Ireland Women in Fisheries Network (NIWIF)

Transnational Networks: North Sea Women Network, Scandinavian Network

Women's local or national associations are characterised by different means, types of actions, and goals including:

- As lobbying institutions;
- Opening doors for women in the seafood industry/ Educating about the industry
- Network and contact development for its members;
- Increasing their negotiation power;
- Taking part in fisheries management policy;
- Claiming social rights and protection as professional collaborators of their partners/ husbands;
- Getting better access to capital resources;
- Skill enhancement/capacity building/training and empowering sessions; and
- Promoting moral support

From the limited material we gathered, it seems that for most associations, the time and financial resources required for administrative work, external representation and meetings impede their opportunities for actions. In many cases, these associations rely on unsustainable public funds. Their success and achievement depends on goodwill and the commitment of one, two or a handful of enthusiastic volunteers. In most cases, women associations lack political recognition.

Women at leadership level

Women with capacity for taking responsible positions in the seafood industries and services are very rare. This is not a question of qualifications or achievements, but the result of invisible barriers. This restriction on women's career advancement, called "glass ceiling", is not specific to the seafood industry (neither to women), but is particularly acute here.

The higher in the hierarchy, the more seldom are women seen. Based on Undercurrent News Report (2014) on the world's 100 top seafood companies, only one company is run by a woman as CEO: Japanese company Marusen Chiyoda Suisan. This is to be compared with 8 percent of top positions held by women in the Fortune 100 USA companies, and

3 percent at FTSE top 100 UK companies (2013 data). Out of 68 companies¹⁴ which have been analysed, 55 percent are run by men exclusively (with not a single woman as director or board member). No company of the sample is run by women exclusively.

The investigation gave another interesting result. In the six Norwegian seafood companies listed among the top 100 world seafood operators, the percentage of woman in board's tops at 39 percent. Except for one (Cermaq), all other public limited companies are obliged by the law to have a minimum of 40 percent of women. Yet when it comes to the composition of the management team, where key decisions are taken, unregulated by law, the percentage of women falls to 21 percent. None of these companies are run by a female CEO.

Table 4. Percentage of women in Norwegian seafood companies in 2015

	Board	Management
Austevoll Seafood	43%	33%
Marine Harvest	44%	38%
Salmar	43%	20%
Grieg Seafood	40%	11%
Norway Royal Salmon	50%	0%
Cermaq	14%	14%
Average on the examples	39%	21%
Number of women	16 out of 41	8 out of 38

Source: websites compiled by M.C. Monfort.

Table 5. Percentage of women holding director's position in the seafood industry in 2014

Denmark (2)	27%
Norway (6)	21%
China (3)	13%
Iceland (3)	7%
Thailand (3)	5%
France (2)	5%
Japan (26)	2%
Chile (4)	2%

Source: Author's compilation based on corporate, Bloomberg and Wallstreet websites.

In brackets, the number of companies observed.

Like oxygen in mountains, women in seafood business are rare with altitude. From our limited sample and long experience in the business we assert that women are excluded from decision levels.

Why is it so? Are women not attracted by this industry, and prefer to pursue other interests or does it reflect on specific discrimination and prejudices that this industry carries against women. If or when the industry makes moves toward a better gender balanced leadership human resource, this question will have to be addressed seriously. Some elements of answers are presented in the section on "Patriarchy Rules".

¹⁴ Details on boards composition were only available for 68 enterprises out of the 100 largest identifier.

At the top of international organisations

As was pointed out in a 2012 OECD report “*closing the gender gap: Act now*”: “*The so-called “glass ceiling” exists: women are disadvantaged when it comes to decision-making responsibilities and senior management positions; by the time they get to the boardroom, there is only one of them for every 10 men*”. More lately, in a report published in January 2015, the International Labour Organization (ILO 2015) stated “*Only 5 per cent or less of the CEOs of the world’s largest corporations are women. The larger the company, the less likely the head will be a woman.*”

As was said earlier, international institutions play a key role in promoting the idea of more women in top positions. But in a soft “do as I say, not as I do” behaviour they do not demonstrate a fierce willingness to apply this at the top of their hierarchy.

The OECD has been run by males only since its creation in 1948, with 9 secretaries general. From its start (1919) the International Labour Organization, has been run by 9 directors general, all males. There is little doubt that the *vision* of equality is enshrined in the United Nations. Yet the organisation since its creation was run by men, and only men, at the top position of Secretary General. Within the UN, the Food and Agriculture Organisation, also created in 1945, was run by 9 male directors general out of 9. It is today assisted by a female deputy general director, one of the two in a list of 18 since 1945. The European Commission and the World Bank also record a 100 percent male presidency since their foundation. The IMF has created a remarkable record in appointing the first ever women to the rank of director general. Let us hope that Christine Lagarde is the first of many. This list of male dominance, more than anecdotal, illustrates how difficult it is to turn principles into actions in the matter.

Where are the women?

In the table below, we suggest a tentative classification of women’s participation in the various steps of the global seafood business environment. Due to the absence of accurate and comprehensive data on a global scale, and the large proportion of undeclared participation of women, this chart only has an indicative value. Yet, it illustrates the presence of women in all segments of the value chain.

Table 6. Concentration of women in the seafood industry, by sector

	No/low	Medium	High
Industrial fishing (high capital intensive)	X		
Industrial aquaculture (high capital intensive)	X		
Professional organisations	X		
Fisheries management	X		
Leadership level	X		
Small-scale fishing (low capital intensive)		X	
Fisheries support activities (ashore)		X	
Ex-vessel selling and marketing		X	
Administration		X	
Quality inspection		X	
Researchers, marine and social sciences		X	
Source of knowledge other than scientific		X	
On-shore aquatic items collecting			X
Small-scale aquaculture (low capital intensive)			X
Seafood processing			X
Environment activists			X
Seafood purchase for households			X

This is not just about counting

Quantitative data do not give information on the real position of women in the industry, the control, the power they have or don't have and the decisions they take part in. Half the seafood workers are women. Yet, behind the apparent parity in number, the disparity in position and power is abysmal. From the reports describing the gender participation in the seafood industry, it appears clearly that where the remunerations and the gains generated along the value chain are lower, the more women there are. We have seen in the above chapter that from the limited data describing the position and role of women in the seafood industry, imbalances are everywhere. But the "add a woman and stir" basic idea promoted here and there has only limited impact. This is not enough to change the standard (where men are more valued than women), to change the rules of the game (such as the domestic work burden always falls on women's shoulders), and in short it doesn't challenge the male domination and the gender inequality.

2.3. CULTURAL AND SOCIETAL BARRIERS AND DISCRIMINATION

The seafood industry in both developed and developing countries is ruled by the patriarchy paradigm, where hierarchy, authority, power, competition, development, control of human and natural resources and domination of others is shaped by males to their benefit. The conditions for participation of both genders in the industry and related services are organised according to these rules at all levels from workers to decision makers. In this environment, the voices of men are valued more than the voices of women. The voices of women remain unheard (FAO, 2012). It does not mean that women do not take part in productive or support operations. They do, but in disadvantaged conditions.

In this section, we review some of the most striking discriminations and barriers which hinder the full economic and social engagement of women in the seafood industry. Many are not specific to this industry, but are familiar in in some cases.

2.3.1. Patriarchy rules

We hereby give a few examples to illustrate how this dominant and nearly universal rule impacts on women participation in the seafood industry.

Extra burden

In all countries, time devoted to child and elderly people care, and to domestic tasks, such as tidying up the house, collecting, buying and preparing food is perceived as a natural duty that falls on women's shoulders. On average, based on an international scale, women spend twice as much time on household work as men and four times as much time on childcare (Elborgh-Woytek, 2013). This adds, depending on the country and the position of the women, one to four hours onto their working days, compared to their male counterparts. This creates a double negative impact on women's participation in the business.

The time devoted to these tasks is not spent on productive work, and the money spent on food, care and education can't be saved to be spent in productive inputs (Aslin, Webb and Fisher, 2000; Neis, 1996). The lack of time may prevent women from taking opportunities to improve their knowledge and upgrade their qualifications.

Impediment to work access

In some countries, women are expected to stay at home and should not be involved in so-called masculine activities such as aquaculture, as is the case in the Philippines, as Felsing *et al.* (2001) report.

In the fishery for sea-cucumber in the Sultanate of Oman, as the stock near the shore declined, pickers were forced to go into deeper water. Due to clothing restrictions, women are now excluded from this fishery. The number of women fishworkers has consequently declined from 50 percent in 2004 to 20 percent lately. (Al Rashidi and Mclean, 2013)

Lower wages or no remuneration

The gender pay gap between men and women occupying equivalent positions applies also to the seafood industry. A study conducted for the United States Agency for International Development on the People's Republic of Bangladesh shrimp value chain exemplifies the differences in earnings between women and men¹⁵.

¹⁵ Development & Training Services, Inc. 2006. A pro-poor analysis of the shrimp sector in Bangladesh [online]. USAID. [Cited 21 May 2012]. www.usaid.gov/our_work/cross-cutting_programs/wid/pubs/Bangladesh_Shrimp_Value_Chain_Feb_2006.pdf

Table 7. Relative earnings of women compared with those of their male counterparts

Activity	Percentage
Catching, sorting fry	64
Repairing ponds, undertaking casual agricultural labour	82
Processing plants – packing section	72
Processing plants – cooking/breeding section	60

Source: FAO, 2012a.

The participation of women in fisheries and aquaculture activities as non-declared, non-paid support personnel to the family business is common worldwide.

Old Boys' club

In developed countries, patriarchy may take other forms of discrimination. Industry players prove recurrently to be not supportive of women. When preparing this document we had a number of discussions with male and female professionals who agreed to share their experiences. Details of the exact circumstances cannot be revealed here. These events happened in the past five years in European countries.

The managing director of a European large scale aquaculture company rewarded his company's managers with a two-day trip to a neighbouring country to watch a football match. What seemed to be a good managerial intention was nothing but a highly discriminatory one: women managers, at the same hierarchy level as the prized men, had not been invited to the tour.

In another European country, fishing trips are commonly organised for prized clients or performing teams. Women are rarely invited because the prejudice is that they would not appreciate these exciting events.

A few years ago, a one day seminar on fisheries, marketing and adding value to seafood was organised with 17 speakers all of whom were men, despite there being a significant number of professional women leaders in the country. Feminists, aware of this unethical event, gate-crashed on stage to denounce the discrimination. Leaders commented on the protest action of activists. The president of the fishermen's association (a man) said: *"I can't be blamed to be a sexist. My first fishing boat was named 'Sweetie'"*. The director of the same association (a man) added *"This feminist complaint is not appropriate. My junior employees are all women"*. The manager of sustainable development (a woman) of a large scale retailer commented *"This feminist interruption is entirely relevant. The speakers have clearly not been chosen for their competence, but more probably because they belong to the same "macho" network"*¹⁶.

Each year, some 70 to 80 speakers are invited to participate in an international fisheries conference. Despite the presence of highly experienced women at this level, very few of them are invited to share their experience and knowledge. When asked the reasons for this partial choice, the director of the event first responded *"Where is the problem?"* then completed his answer *"I and my team had no names of female experts we could think of inviting. We had no women in our network!"* Several years after the first show, which

¹⁶ Quotes from this event were collected by the author at the event on 26 May 2011.

counted less than 5 percent of female speakers, the 2015 edition counts no more than 11 percent.

Women are also discriminated in public space. Media show a low interest in professional women. When in October 2014, EUROFISH magazine wrote a special 20 page dossier on fisheries and aquaculture in the Republic of Croatia, the journalist included interviews with 14 persons of which only one was a woman. This is far from reflecting the gender reality of the industry in the Republic of Croatia. When asked about the reasons for this choice, the journalist explained that he visited the persons who were recommended to him by the Ministry and that he did not think of giving special attention to this issue.

These disparate examples, collected in Europe, indicate that women invisibility is not the output of unfavourable statistics but the result of conscious or unconscious chauvinism ingrained in the seafood industry players. It also says that men network and operate efficiently, as they support and promote each other. Old Boys' club behaviour is still prevalent.

2.3.2. Prejudice and cultural segregation

Women are not welcome at sea

One of the major cultural taboos observed in the industry all over the world concerns women and the sea. In many developed and developing countries they are not permitted or are discouraged to go out fishing. Women are believed to bring bad luck on a fishing boat and to be responsible for a meagre harvest!

In most countries, it is perceived by communities that women lack physical strength to go to sea. Yet, examples of successful fisherwomen obliterate these cultural allegations. *"I knew I would not have the physical strength of men, therefore I equipped my boat with mechanical tools and never had problems to haul the net. I hope one day the profession will be more open to women"* explained Scarlette Le Corre, French fisherwomen (Le Monde, 2014) operating from a 10 meter long motorized boat.

2.3.3. Ownership and access to capital

The legal environment specific to women directly shapes their participation in economics. The International Monetary Fund report "Fair Play: More Equal Laws Boost Female Labour Force Participation"¹⁷ gives evidence of more legal discriminations against women, such as owning and managing a property, getting a job, accessing finances services the lowest female labour force participation.

Owning a piece of land, a prerequisite to run a fish farm, is still denied to women in many countries, either by law or more often by cultural segregation. Similarly, in some countries women are not allowed to own a fishing boat. The absence of property rights has a cumulative negative impact. It prevents women from getting access to credit and insurance services and from investing.

¹⁷ IMF 2015.

Sara Fröcklin observed in the United Republic of Tanzania (Fröcklin, 2013) that the lack of capital means for women traders the lack of resources to buy necessary equipment for storing fish, maintaining quality and freshness. Consequently the lack of cold storage facilities and the resulting limited number of customers, predestined women to trade fish at a lower value than what they would get if they were properly equipped. The loss of product value induces a loss of power on markets.

P.B. Browne also detected that in the Republic of Sierra Leone due to the lack of financial means, women did not have the opportunity to upgrade their processing equipment with improved technology. Most of them still use rudimentary and fuel-inefficient ovens, despite the development of more fuel-efficient smoking ovens.

Credit schemes are most of the time designed to target male clients and rules for accessing credit and conditions to borrow are more stringent for women. These prejudices against women are widespread in developed and developing countries.

2.3.4. Lack of awareness of experts and policy makers

Women in the sector are marginalised in planning and policy-making and unless this is changed, they will continue to suffer inequalities and discrimination, testified Meryl Williams at the first international symposium on women in Asian Fisheries held in 1998 in Chiang Mai, Kingdom of Thailand. Fifteen years later, J Dey de Pryck expressed similar thoughts about policy makers' blindness: "*the approximately 90 million women are often invisible to policy-makers who have traditionally assumed that fisheries are largely a male domain*" (de Pryck, 2013).

Dramatically, even in fisheries where their formidable participation has been recognized, women's interests continue to be omitted. For instance, prior to defining the lines of a new fishing contract with the Republic of Senegal, the EU Commission appointed consultants to evaluate the opportunities of a bilateral agreement. Six authors from three renowned consultant firms, one French and two British, produced a 115-page report of recommendations. In this report, women were only cited once. None of the 10 lessons to be learned from the past referred to the ubiquitous presence of women, and only the last out of the 11 recommendations ranked by order of importance, referred to women occupations in the industry (DG MARE, 2013).

Hopefully, the recent introduction of gender sensitive parameters in the new EU fund programme constitutes a positive and encouraging step. For the first time, the role that women play in the fishing business will be recognized. Thus, they will benefit from European Maritime and Fisheries Fund (EMFF) support for training, in particular for the acquisition of skills linked to entrepreneurship and business management (EU Commission website).

Overlooking women fishing activity leads to underestimating the human pressure on the marine ecosystem, and distorts scientific advice based on biased or fractional knowledge. Taking into account women activity will improve management decisions.

The above discriminations refer to traditional barriers ingrained in the culture and society. But lately, it has been observed that recent macro changes have affected women seafood

workers in substantially more adverse ways, in many cases eroding their already disadvantaged positions.

Table 8. Constraints and obstacles to women’s participation in the seafood industry

Societal	
Constraints/ obstacles	Impact
Male dominant society	Limited access to influential networks Lower chances to occupy intermediate and leading positions
Time spent on family caring	Less time for all other productive activities Less time for making money Less time for upgrading knowledge, participating in training courses Unpaid undeclared support to the family business
Specific to the industry	
Constraints/ obstacles	Impact
Barred from certain activities	Not allowed to go at sea Glass ceiling effect: hindered from accessing top positions
No ownership rights	Less possibility to run own business Less possibility to access finances, insurance, services
Prejudices against women limit their access to capital	Limited access to credit, financial services More stringent rules to borrow compared to men Hinders investing in modern technology for fishing, farming, processing
Policy makers’ gender blindness	Low visibility of women Disadvantageous policies or less access to support policies Non-women friendly support programmes (training, etc.)
Lack of women’s organizations	Low lobbying power Low representation at decision making levels

2.4. ERODING POSITION OF WOMEN

Over the past twenty years, major economic developments have affected the life of many fishermen and fisherwomen. Opportunities have emerged and millions of jobs created. At the same time, new threats have been detected that further marginalize women in the seafood industry. Globalisation and its appetite for cheap input, the widespread decline in marine resources, the deterioration of marine habitats and the local or regional impacts of climate changes, among other events, generate severe consequences on fragile populations, among which women are numerous. Women are more affected by these consequences because they have less access to resources compared to men.

2.4.1. Globalization

The worldwide inclination for globalization has shaped the seafood industry from early times. International trade of seafood has always existed. For centuries cod was exchanged

across the Atlantic Ocean, herring roes moved from the north to the south of Europe. But never has the free movement of goods, foreign investment and speculative capital been so intensely and widely dispersed as in the past twenty years.

Global economy is fuelled by competition and profit expectations. To become and remain a winning player in this context, the ability to be highly performing and to generate comparative advantages is not optional. The size of the players, which enables accessing financial, natural and human resources at the lower possible cost, is one key for success.

Globalisation has brought mixed socio-economic outcomes for men and women involved in the seafood industry. If some people benefitted from new emerging work and business opportunities, for various reasons women tend to win less than men, and sometimes tend to be even left behind. Here are some examples.

Offshore outsourcing

Thanks to more effective networks of transport, communication and information, globalisation induced formidable opportunities for the seafood industry for reducing cost and inflating profits. From the late sixties to the early 90ies the canning industry for instance, has seen premises massively displaced from Northern to Southern countries. Reducing transport costs and getting access to cheaper workers were the two main reasons for this massive geographical movement of capital. Tuna canneries closed down in the United States of America to be moved to American Samoa. In the French Republic, fabric factories shut down to reopen in the Republic of Madagascar and in the Republic of Seychelles. The Port Lincoln, Australia tuna cannery was displaced to Thailand. According to partial reports (mainly newspaper articles), in most cases, laid off women paid the highest cost due to the difficulties they faced in finding alternative paid occupations. Unfortunately very little research work has been undertaken to investigate these cases.

Exploitation of women in export-oriented industry

Nikita *et al.* (2007) analysed the impact of trade liberalisation on women working in the Republic of India's export oriented seafood industry. A large proportion of the female workers interviewed confessed to researchers that the work environment has improved significantly in the past years. Upgraded safety, sanitary and working conditions have been implemented by industrialists as a response to the stringent demand of importers¹⁸. But international markets not only impose new working standards; they stimulate competition between suppliers who are forced to reduce their production costs to maintain their competitiveness. Hiring on contract gives more flexibility to employers but more job insecurity to workers. This has intensified the casualization of the labour force paid at the lowest possible level, with limited or no social and health benefits. Nikita *et al.* (2007) report that 88 percent of the women workforce was employed as temporary staff. This concerns both men and women, but as was said earlier, post-harvest jobs are mainly executed by women. Furthermore, such casual contracted jobs exclude advancement opportunities, skill upgrading and empowerment.

¹⁸ Ensuring decent working conditions is part of international standards imposed by some consumer labels such as Fairtrade, Naturland and Ethical Trading Initiative.

Deprivation from resources

Over the past twenty years, the area exploited for raising farmed shrimps *Penaeus vannamei* and *Penaeus monodon* has increased considerably. On the bright side, aquaculture offers formidable job opportunities for men and women in both the culture and the processing sectors. On the negative side, it has expelled people from marine or coastal sites they used to exploit. For instance, in the Republic of the Philippines, the growth of aquaculture was achieved at the expense of women crab collectors who have been displaced. In the Republic of the Philippines and other countries, shrimp aquaculture was carried out at the cost of loss of mangrove forest, and deprived the local population of access to wood and leaves utilised for fuelling ovens. Consequently, women who are almost everywhere the person in charge of wood collecting, spend more time to gather the necessary firewood and can only devote less time for other productive occupations (Halim, 2004).

In the Republic of Senegal, during the period from 2011 to 2014, eleven large-scale Korean and Russian processing units were installed near artisanal fishing landing sites, between Kayar in the North of Dakar, and Joal, covering nearly a third of the Senegalese coastline. These plants, targeting the export markets for fish meal or frozen fish portions, buy large quantity of both high and low value fish from local fishermen. In doing so, they deprive local buyers, who are mostly women, from their resource and thus their jobs¹⁹. They also dispossess local communities from an important source of protein. Khadi Diagne, one of the women processors, testified that her revenue declined two fold within three years, since the arrival of these powerful competitors (Le Monde, 2014).

The development of export oriented processing companies along the Republic of Uganda's shores of Lake Victoria has had some detrimental impact on professional women already in the processing business, explained Margaret Nakato (Nakato, 2004). The expansion of export oriented companies, developed with the financial and technical assistance of international funds and aid agencies, has induced a rise of ex-vessel prices. Local women processors were deprived of their ability to add value to the fish, now too expensive to be sold on the local markets. As a consequence, women's incomes have declined.

Modern organisation and modern technologies

Modern technologies and labour organisations tend to marginalise workers in small-scale activities, including backyard farming, artisanal fishing, and seafood processing and selling. This impacts both genders, but as prerequisites for capital increases, women tend to be excluded more than men due to their lack of financial and social resources (De Silva, 2011).

At GAF 5 in Lucknow, Republic of India, Edwin *et al.* (2014)²⁰ demonstrated the direct impact of technological changes on women in the ring net seine fishing in Kerala. The shift in fishing technology and practices, that implied high seas fishing with capital intensive equipment excluded women, for both cultural and financial reasons. Moreover, the sites of landing moved far from traditional landing beaches to equipped harbours. Women could not participate in the post-harvest activities, including processing and primary selling. In

¹⁹ In Joal 500 women process the fish (Le Monde, 2014).

²⁰ L. Edwin, D. Das, N. Gopal, and B. Meenakamuri (2014).

the modernised wholesale markets, the size of merchants is a key for success, and this places women small businesses in an unfavourable position.

Bodil Maal evidenced that in the Kingdom of Norway modern aquaculture “*industrialisation, vertical and horizontal integration, may potentially exclude local communities, rural people and especially women from the aquaculture sector.*” (Maal, 2013). Over the 20 years and more of salmon farming development, from 1990 to 2010, the Kingdom of Norway, the world’s leading producer of salmon, experienced a 600 percent increase in farmed *Salmo salar* production. In the same period (from 1994 to 2010) women employment decreased from 20 percent in 1990 to 9 percent in 2010. The reasons for this decline in women employment are several. The industry has evolved from family business where often women held part time jobs, to modern integrated capitalistic corporations hiring more professional employees. In the meantime, the Kingdom of Norway’s coastal areas enjoyed expanding job opportunities, offering better job conditions to women, compared to aquaculture (Pettersen and Alsos, 2004).

2.4.2. Overfishing

The decline in marine stocks has caused the adoption of new fishing practices including moving to alternative areas, further from the coast or further from the sites where the fishers live, and buying new fishing gears. These changes have been disadvantageous to women. In many cases, women don’t have the necessary resources: capital to upgrade their fishing equipment (engine, new gears) and to preserve the fish quality (ice, boxes), and time to get to the more distant sites. They cannot afford to move too far away from their homes where they take care of the family.

2.4.3. Climate change

The increased frequency and intensity of climate phenomena (storm, drought, flood, saline intrusion, coastal erosion, sea level rise, shortage of fresh water) have hit coastal communities severely, in “*profoundly discriminatory*” ways as Oxfam asserts, based on its long experience in climatic disasters (Oxfam, 2005). Not everyone is affected the same way, and women are among the most severely hit. The London School of Economics that analysed disasters in 141 countries provided evidence that “when women’s rights are not protected, more women than men will die from disasters” (Aguilar, 2008).

Moreover, women are more severely hit by natural and climate hazards due to their under-representation in decision making bodies and their economic marginalization. They often are badly informed before, during and after the disaster strikes (Jover and Defiesta, 2013; Sumagaysay, 2014). Vu Phuong (2012) also reports that they may even suffer physically as, in response to food shortage, women in the community he studied tended to eat less and let their husbands and children eat first.

Cochrane *et al.* (2009) temper the frequent generalization and unproven assumption that women are less endowed than men to face climatic changes, and recall that “*in many situations, for example, women may have access to abundant and diverse forms of social capital which may provide excellent support to overcome certain types of impacts or extreme events*”. Yet, everyone agrees that women bear a good part of dramatic impacts of climate changes and that “*These issues need to be studied in depth with urgency so as to evolve policies to mitigate these challenges.*” (FAO, 2011).

3. ACTIONS FOR IMPROVING WOMEN'S PARTICIPATION IN THE SEAFOOD INDUSTRY

A growing body of literature points to the clear relationship between female participation in economics and national economic growth and corporate performance. At national level, the positive effects of women inclusive policies were evidenced in several large-scale studies (OECD, 2011; IMF, 2013). To properly acknowledge women's work stimulates economic growth and decreases poverty, when discrimination against women is economically inefficient. If private companies do not move from a moral imperative, they may do it in order to take advantage of opportunities to improve performance.

In this chapter we present several public and private initiatives which aim at inclusion of women or eradication of discrimination. Not all of them refer to the seafood industry, but all demonstrate that positive actions may be taken.

3.1. PUBLIC ACTIONS

After forty years of changes in society, research and reports, and international conferences, the importance to give women the same rights as men and to recognise their contribution as an important agent for growth and a key driver for poverty reduction is now widely acknowledged, and is slowly but surely entering public policies. In this matter, the United Nations has played and still plays a persuasive role at conveying this idea to the international agenda. But we will see that policies to reform the seafood industry have still a long way to go to fully resolve this issue.

3.1.1. The initiatives of the United Nations

The United Nations launched its first strong signal in the mid-seventies. It declared 1975 as the International Year for Women. It exhorted development agencies to include women in their programmes and to be "gender-sensitive" in their policies and practices²¹. Another important step followed in 1979, when the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) formalized rights for women by the UN General Assembly. Gender equality became a central focus. The UN urged governments to promote, protect and fulfil the equal rights of men and women in their own jurisdictions²².

At the 1985 Third World Conference on Women in Nairobi, Kenya the concept of gender mainstreaming, a globally accepted strategy for promoting gender equality was adopted. Mainstreaming is a tool to achieve the goal of gender equality. It involves ensuring that gender perspectives and attention to the goal of gender equality are central to all activities including policy development, research, legislation, resource allocation, and planning, implementation and monitoring of programmes and projects designed for public policy²³. This is a key tool for achieving the goal of equality.

The idea was then formally featured in 1995 at the Fourth World Conference on Women in Beijing, China, exactly 20 years ago. The Beijing Declaration and the Platform for Action, adopted unanimously by 189 countries, is an agenda for women's empowerment and is

²¹ FAO, 2007.

²² www.un.org/womenwatch/daw/cedaw/recommendations/recomm.htm

²³ www.unwomen.org

considered as the key global policy document on gender equality²⁴. The Beijing Platform for Action commanded governments and other players to promote an active and visible policy of mainstreaming a gender perspective in all policies and programmes.

Mission Statement from the Beijing Platform for Action

The Platform for Action is an agenda for women's empowerment. It aims at accelerating the implementation of the Nairobi Forward-looking Strategies for the Advancement of Women and at removing all the obstacles to women's active participation in all spheres of public and private life through a full and equal share in economic, social, cultural and political decision-making. This means that the principle of shared power and responsibility should be established between women and men at home, in the workplace and in the wider national and international communities. Equality between women and men is a matter of human rights and a condition for social justice and is also a necessary and fundamental prerequisite for equality, development and peace. A transformed partnership based on equality between women and men is a condition for people-centred sustainable development. A sustained and long-term commitment is essential, so that women and men can work together for themselves, for their children and for society to meet the challenges of the twenty-first century.

Source: www.un.org

In 2000, 189 nations at the Millennium Summit of the United Nations adopted the so-called Millennium Development Goals (MDGs), of which the third goal was gender equality and women empowerment, to be achieved by 2015. In 2010 the United Nations Women Organization was created by the UN General Assembly to foster the implementation of these goals. *“But no country in the world has fulfilled its commitment to the Beijing Platform”* regretted Hillary Clinton²⁵ in 2014 in a public address.

The 20th anniversary of the Beijing conference is being celebrated in 2015. In early 2014, every signatory country, including the 7 countries included in this study, produced a report describing progress to date. The examination of these reports show that the concept of gender equity has not yet been fully accepted by the seafood industry and a lot remains to be done when it comes to gender equality and women empowerment.

Positive actions developed by the FAO include the organisation of dedicated conferences, the financing of specific studies for a better understanding of the issue, including this one, and the setting up of an international network for women in fisheries. The inclusion of a gender perspective in the recently (2014) adopted SSF Guidelines is to be welcomed.

²⁴ www.unwomen.org

²⁵ Why Women and Girls Count. (Bill, Hillary & Chelsea Clinton Foundation, 2014).

Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication²⁶

Small-scale fisheries are the dominant model for catching fish and other aquatic food, supplying half of total catches and by far the largest employment provider with about 120 million people of which about half are women. The contribution of this large segment of the sector has been massively neglected by global decision makers, until the FAO launched a series of discussions and debates in 2011. Three years later, in July 2014, the 31st Session of the Committee on Fisheries endorsed the SSF Guidelines.

The SSF Guidelines address five thematic areas: governance of tenure in small-scale fisheries and resource management; social development, employment and decent work; value chains, postharvest and trade; gender equality; disaster risks and climate change. In the specific “gender equality” chapter states are encouraged to address the issue of specific barriers impeding women participation at decision making level in professional organisations.

The inclusion of gender specific provisions in this global set of recommendations is to be seen as an achievement, or more accurately an improvement. Still, a lot remains to be done by national public institutions to reduce discrimination against women. This progress, as analysed by Katia Framgoudes and Nalini Nayak remains unfortunately a stand-alone article (Article 8) when this issue cuts across many other areas. Moreover, the researchers indicate, *“Women and gender appear to be used as synonyms in the Guidelines, indicating that little effort has yet gone into understanding the root causes of women’s inequality, especially the powerful patriarchy of the sector.”*²⁷

3.1.2. Development and donor agencies

Development and donor agencies, such as the Asian Development Bank (ADB), the Norwegian Agency for International Cooperation (NORAD), the Swedish International Development Cooperation Agency (SIDA), the World Food Program (WFP), the French Development Agency (AFD), and USAID, just to name a few, are key players in the economic and social progress of developing countries.

In the seventies it was understood that the exclusion of women from the planning and implementation of projects was part of the project’s failure (Williams, Williams and Choo, 2002). But it was not until the mid-nineties, i.e. since the Beijing Conference, that international development and donor agencies began putting gender policies in place. The first years after the Millennium, with full recognition of MDG3, the inclusion of the gender perspective was boosted in the project approaches and evaluation of gender began to be implemented²⁸.

²⁶ FAO, 2014.

²⁷ www.genderaquafish.org

²⁸ Africa Development Bank.

In 2013 and 2014, the French Development Agency²⁹ introduced a gender sensitive strategy in the Agency's activities for the period 2014-2017³⁰. This new approach, motivated by the French Ministry of Foreign Affairs, will require strong political commitment and *ad hoc* sessions for strengthening human capacity with gender training directed at the agency's personnel.

3.1.3. The European Union: a promising step forward

The European Union which has been promoting gender equality from the start (Rome treaty) has taken a further step in its revised treaty signed in Amsterdam in 1999. It included provisions to oblige Member States to eliminate inequality and promote equality between women and men in all areas of activity.

Besides the rhetoric, visible signs of this commitment in the seafood business environment have emerged recently. The first study tackling the participation of women in the industry dates back to 2002 (MacAlister Elliott and Partners, 2001). That year, the 17th issue of its periodical publication "Fishing in Europe" was entitled: "Women in fisheries: an unnoticed role" and the editorial starts with a vibrant "*The European Commission acknowledges women's role in fisheries. Despite their presence at all levels and in all areas of the sector, the role of women in European fisheries has until recently remained largely unnoticed*³¹." European institutions including the Commission and the Parliament now strongly encourage national governments to be more "gender sensitive" in their policies. One effective means of persuasion, which was introduced a year ago, is the introduction of gender issues as selection criteria in the allocation of subsidies.

In 2011, the EU Commission suggested a major reform for the fisheries and aquaculture sectors, to be implemented on 1 January 2014 and the setting up of the new European Maritime and Fisheries Fund (EMFF) to help fishermen and the coastal communities to face the needed transition. The EMFF fund of 6.4 billion euros is to be distributed during the period 2014–2020.

The amount is far from negligible and each member state will try to meet the requirements, which include commitment to gender equality. Article 7 expresses the integration of the gender mainstreaming strategy. It states "*The Member States and the Commission shall ensure that equality between men and women and the integration of gender perspectives are taken into account and promoted throughout the preparation and implementation, in relation to monitoring, reporting and evaluation of programmes (...) Member States shall also carry out gender analyses where appropriate.*" In addition two measures (Articles 29b and 50c) in the EMFF focus specifically on promoting equal opportunities between men and women. Article 97 and Article 113 both also focus on promoting equality between men and women through the management and control systems of the operational programme instead of through grants.

²⁹ The Agence Française de Développement (French Agency for Development - AFD) is a public development finance institution that has been working to fight poverty and foster economic growth in developing countries and the French Overseas Provinces for 70 years.

³⁰ AFD 2014.

³¹ EU 2003.

This leaves each member state to draw up an operational programme (OP), saying how the Member State intends to spend the money and how it intends to apply a gender equality approach. The OP will be sent to the EU Commission some time in 2015, and as we are summing up the information, the Republic of Latvia is the only country to have presented its specific requests to the EU³². Once the Commission approves this programme, it is up to the national authorities to decide which projects will be funded.

Yet an important question remains wide open. How will fishermen, fishing communities and concerned administrations tackle these questions when in Europe, still only a few of the seafood industry stakeholders have been educated or sensitized to the issue. Most of the Member States will have difficulties inserting gender sensitive projects in their applications. Well aware of this major difficulty and to help them visualize the subject, the European Commission has sent to member states a guideline (EU, 2014). This four page document is unlikely to be an adequate tool when officers are far from aware of what is at stake.

National Institutions

In France in March 2015, the Fisheries Department published a very inspiring book containing portraits of 42 women working in the industry as fisherwomen, fish farmers, and processing and other support industry workers, in an effort to inspire young women to join the industry, according to Cécile Bigot, the coordinator of the project. The book, 300 copies of which were published, is available on the internet³³.

Specific support to small scale local projects

Axis 4 of the European Fisheries Fund (EFF) is a tool for fisheries communities to drive development locally. It is implemented by private-public partnerships called Fisheries Local Action Groups (FLAGs). Since the inception of this programme, some 300 FLAGs have developed 10 000 local projects. The projects, designed by and for women, are not specifically inventoried. Katia Framgoudes carried out a study on a limited number of initiatives (55 FLAGs stated that they managed 1,690 projects with a total budget of EUR 150 million) and states: *“The lack of data makes it impossible to evaluate the results and impacts of the various EFF programmes in terms of promoting equal opportunities”* and concludes *“There is however still a need for indicators that can be used to evaluate the real impact of the Funds on women.”* (Framgoudes, 2013).

3.1.4. Not-for-profit associations

We collected data describing small scale projects that support women in the fishing, fish farming and processing industries. The format, the monitoring and the financial details of these training and empowerment programmes vary by project. Among the donors were the national development agencies (NORAD, DANIDA, SIDA, AFD, etc.). From the few examples reviewed, there is no doubt that these projects are important to the population targeted (Gomez, 2007; Rahman and Naoroze, 2007).

³² Unfortunately the document is in Latvian language. We cannot report the specifics of gender related projects.

³³ Femmes de mer - 42 Portraits de Femmes travaillant dans les secteurs de la pêche et l'aquaculture. www.developpement-durable.gouv.fr/Femmes-de-mer-42-Portraits-de.html

3.2. PRIVATE BUSINESS INITIATIVES

Why would the private businesses want to invest in offering women better access to employment, promotion and better recognition in the industry? Reasons vary greatly between sectors and economic environments and size of the company.

Employment shortage

To Neil Tregarthen, CEO at NES Global Talent³⁴, the answer is straightforward: “*The global focus on attracting more women into the oil and gas industry is not just about creating a more diverse workforce; it is of vital importance if we are to continue to serve the world’s growing energy needs as the sector is facing a crippling skills shortage.*” (Nes Global Talent, 2014).

In many countries, the fishing industry is in the hands of an aging population of men. This demographic feature is not sustainable, and specific programmes need to be developed to attract young personnel from both genders. In France, for instance a deficit in local fishermen expertise requires recruitment of male fishermen abroad. In 2008, the latest known year, 278 foreign fishermen were hired by the French fleet. The industry has never considered promoting these jobs to women, and the advertisement material is designed to attract young male candidates.

Industry image

In many countries the seafood industry is not attractive to women; neither is it much to men. In many cases, this industry is the choice of people who have no choice. If it wants to attract the best, the industry will have to make some efforts to become more attractive, including to women.

Improved performance

Catalyst, a Canadian pressure group, ran a study based on 500 Fortune companies and evidenced that women board directors outperform return on equity by 53 percent return on sale by 42 percent and return on invested capital by 66 percent, compared to boards with no women (Catalyst, 2007). Credit Suisse confirms that where more than 15 percent senior managers are female, the return on equity was 6 points superior compared to companies with less than 10 percent women on-board (Dawson, Kersley and Natella, 2014). If a correlation between bottom line performance and presence of women in boards seems strong and repeatedly proven in study after study, the debate on what is the cause and what is the consequence is still open. But it should not ignore the fact that gains for private enterprises are not only financial. The competitive edge includes other positive elements. The benefits of the gender balance policy include innovation, team dynamics, tone of communication, improved relations with local communities, a more positive image of the activity, and the reputation of a progressive company (IFC, 2013).

³⁴ Provider of technical and engineering experts to the oil and gas, power, infrastructure, chemical, life sciences and rail sectors worldwide.

3.2.1. In non-seafood industries

Women's Empowerment Principles

Convinced that gender diversity helps businesses perform, UN Women, the UN Global Compact, other leading UN agencies, the World Bank and the World Economic Forum launched this programme dedicated to private business. This pragmatic international standard is designed to help private companies address and report on progress on the issue of inclusion of women in their working environment. The Women's Empowerment Principles programme includes 7 principles³⁵:

1. Establish high-level corporate leadership for gender equality;
2. Treat all women and men fairly at work - respect and support human rights and non-discrimination;
3. Ensure the health, safety and well-being of all women and men workers;
4. Promote education, training and professional development for women;
5. Implement enterprise development, supply chain and marketing practices that empower women;
6. Promote equality through community initiatives and advocacy;
7. Measure and publicly report on progress to achieve gender equality.

To date, 862 companies have embraced this programme, of which 47 are food, 10 oil and gas, and 4 forestry companies but none from the seafood sector. Each company has developed specific in-house tools related to addressing one or several of the above listed principles.

Other women empowerment programmes

Based on an examination of the 40 largest listed companies in France, Deloitte Conseil found out that 22 companies have launched a dedicated programme, engineered within the company, to *“break the barriers that prevent women from getting access to the same opportunities as men”* (Deloitte, 2012). These tools, different from one company to another, include good recruitment practices (to improve the gender balance in the company at leadership level), women mentoring programmes, gender sensitization programmes directed at employees, men and women and adoption of specific rules to facilitate parenthood leave for both parents. This French case illustrates that large scale corporations have started working on this issue.

Women associations and networks

Many industries have set up global or regional networks aimed at supporting women along their career, and providing training, mentoring, connections, advice, etc. to them, such as the Rwanda Women Network, Women in Renewable Energy Scotland (WiRES), the Confederation of Indian Industry Women Network, etc. These networks are usually backed up by the industry or by public funds. Their objectives and output vary according to each network.

³⁵ www.weprinciples.org

Corporate Social Responsibility and gender issues

Private companies may find advantages in setting and complying with internal rules and objectives and presenting them publicly in what is commonly called a Corporate Social Responsibility (CSR) report. The report illustrates the economic, environmental and social impacts created by the company's activities. Sustainability reports rarely contain data broken down by gender, but there is increasing demand for this information. The company may adopt a globally accepted guideline such as the one developed by the Global Reporting Initiative known as GRI (GRI & IFC, 2009), which includes relevant gender-related indicators (G3). This guideline, which is a tool not a policy, means that the company accepts to measure and report its practices.

3.2.2. In the seafood industry

Through our research, we could only spot a few positive initiatives. The seafood industry in general, its leaders in particular, have proven to be oblivious to the gender issues, unaware of the discriminations that women undergo and, at the end, to be not supportive of women.

Private company initiatives

Despite our diligent research, we have not found one single in-service initiative addressing the gender inequality or a programme directed to promotion or empowerment of women in private corporations in the seafood industry.

In the few CSR reports we reviewed, only one, the Cermaq 2013 report (complying with the GRI reporting), revealed a specific intention *“The Board is of the opinion that in the long term it would be preferable to increase the percentage of female leaders in the Group. One means of achieving this would be through in-house talent development.”* Yet, the Corporate Affairs Director³⁶ confirmed to us *“Cermaq’s gender diversity programs are not very advanced (...) but new talent programmes are being planned.”*

Women’s networks in the seafood industry

Several women networks have been launched in the past two decades. They all have been active at inception but lost their enthusiasm with time, due to lack of finance and time devoted and, in some cases, due to the lack of clear objectives and sustained human and financial means to achieve them. Their survival is often the result of the will and enthusiasm of one or two women.

In Europe, the association of women shellfishers³⁷ is often cited as an inspiring model. Prior to the mid-nineties women were not permitted to attend meetings in cofradías (local fishers organisations). After they attended training courses, organised with the support of women public servants working at the Regional Ministry of Fisheries and Maritime Affairs of Galicia, which stimulated the self-confidence of the women, they occupied an increasing number of positions within the boards of cofradías. As a result of this successful empowerment process, women were better off (higher income, social benefits), the

³⁶ Email conversation dated 30 January 2015.

³⁷ In Galicia, Northern Spain, women shellfishers constitute 95% of the circa 8 000 on-foot shellfishers.

shellfish fishery better managed and the entire management of the sector improved (Framgoudes, Marugan-Pintos and Pascual-Fernandez, 2008).

In July 2014, the Australia-based association “Aquaculture without Frontiers” launched an Aquaculture Women’s Network. As we write this report, the aim, means, strategy and tools are under discussion.

In 2015, the FAO ran an investigation on the relevance of monitoring an international network for women at leadership level in the seafood industry. As we publish this report, the results of a survey carried out on 40 professional women showed an interest for such a network. Its objectives, strategy, means and governance remain to be settled.

Self Help Groups (SHG)

Self Help Groups represent an original social-economic structure, with the objective of organising mutual help and benefit for a small (10 to 20 members) homogeneous group. This micro-finance scheme is well suited to women in rural areas. SHGs facilitate the access of poor women to microfinance and facilitate members’ access to capital and education. Self Help Groups, key instruments for supporting women’s empowerment, are often facilitated by NGOs, and supported by governments. This tool is intensively utilised in India.

“We want self-help groups to be a tool to transform women into individual entrepreneurs”, said Senthil Kumar, reporting and monitoring officer for the International Fund for Agricultural Development (IFAD) to Interpress Service newspaper in February 2015³⁸. Numerous seafood projects run by SHGs have proved to be successful.

Role models

The entire literature on empowerment and career stimulation in any industry emphasizes the key impact that role models play. Precisely because men hold tight to all positions in the public sphere, charismatic and successful women in the seafood industry are seldom visible, and their inspirational impact limited.

The initiative of the “Aquaculture without Frontiers” Women’s Network in launching in December 2014 a “Woman of the Month” award is to be lauded. The first “Woman of the Month” was Dr. Jennifer Cobcroft, BSc, PhD, Research Fellow at the Institute for Marine and Antarctic Studies, University of Tasmania. The second nominated “Woman of the Month” was Dr Anna Mercy, professor at the University of Fisheries and Ocean Studies of Kerala, chosen for her long commitment to promoting aquaculture³⁹.

³⁸ Women Pick Up the Slack as Fishing Declines on India’s Southern Coasts By Nachammai Raman on Interpress Services, February 2015.

³⁹ www.aquaculturewithoutfrontiers.org/womens-network/woman-of-the-month-award/woman-of-the-month-december-2014/

Gender awareness initiatives

Several initiatives have contributed to raising attention on gender issues in fisheries and aquaculture, mostly undertaken in the Asia-Pacific region. These include the biennial Gender in Aquaculture and Fisheries (GAF) conference, the Women in Fisheries publication of the Secretariat of the Pacific Community, and Yemaya (published by the International Collective in Support of Fishworkers).

We have not identified specific private events launched to stimulate gender awareness, promote women in the industry or to empower them.

4. CONCLUSIONS

For some thirty years now, research has been carried out, reports have been published, and debates have been organised on the issue of discrimination against women, but in the seafood industry the level of awareness about the important role played by women is still very limited among seafood stakeholders.

When considering this industry as a whole, including fishing, aquaculture, seafood processing and all related services, women represent about half of the total workforce. There is evidence that the working participation of women is constrained or affected by strong cultural rules, robust societal conventions and even in some cases by discriminatory laws. Women are present in all segments of the seafood industry, yet are invisible; they are efficient workers, yet most often underpaid. They have little or no access to resources allowing them to face adverse external events as they do not receive the same public support as men. In addition, on-going global changes including the demand for cheap inputs, the widespread decline in marine resources, the deterioration of marine habitats and the impact of climate changes, among other things, further affect already fragile populations, to which many women belong.

Twenty years after the Beijing World Conference on Gender Equity, further efforts need to be made in most developing and developed countries, by public and private agents. This work demonstrates that the seafood industry is, by far, not an exception.

5. CASE STUDIES

This last section reviews the state of knowledge and awareness on women's participation in the seafood industry in six countries. The selected countries represent different social and economic contexts: the Republic of Croatia, the Arab Republic of Egypt, the French Republic, the Republic of Iceland, the Republic of India, and the Republic of Senegal.

Due to the lack of data we have used a qualitative approach to measure the level of knowledge of women's situation, the level of public and industry awareness and the level of corrective actions undertaken in each country.

In each country, we measure the **level of knowledge and the level of awareness of women's situation** in the seafood industry, not the actual level of disparity or discrimination. This simple tool is not meant to run comparisons between countries.

5.1. METHODOLOGY

In each country, we have compiled all available data related to seafood and gender to assess qualitatively what is known of women's participation in the fisheries and aquaculture value chain and what is done to improve their situation when inequality had been noticed. Data are rather poor in most countries. This paucity of data is in itself a telling result.

We have used an assessment grid made of three successive steps.

Step one. What is the state of knowledge on potential gender-bias in the seafood industry? To answer this question, we looked for **sex disaggregated data** in the different segments of the industry (fishing, fish processing, aquaculture, fish trading), and for **qualitative social studies** carried out by sociologists, anthropologists or economists about gender-based distribution of roles and power in the industry and all along the value chain (access to education, capital, network, visibility, power). Are women recorded in official statistics? What do we know about their contribution to the seafood value chain?

Step two. What is the level of knowledge of the status of men and women in the society and the existence or otherwise of gender inequality (access to education, capital, network, visibility, power). If/when there is evidence of gender-bias in the industry, has this bias been publicised to raise people's awareness. Has **any gender imbalance been addressed** by public authorities, trade unions, NGOs, by industry stakeholders in the society and in the seafood industry?

Step three. What is done in practical terms to correct the imbalance? What initiatives have been taken in the seafood industry, **by the public sector and/ or by private companies**?

We have used a marking scheme as follows: 0 (when no data/ action is available), 1 (little data/ action), 2 (good data/ action), and 3 (when comprehensive data/ action is available). This simplified filter helps highlight any gaps of information and actions and identify the areas which require further research and private or public action.

Table 9. The three step assessment grid for gender analysis

Knowledge of women’s participation, gender-based roles and power distribution in the seafood industry	
Gender-based role distribution: quantitative data in the industry	Does sex disaggregated data exist? Is there a systematic collection organised? Who provides labour force/ capital; who owns resource; who makes decisions?
Knowledge and understanding of gender relationships in the industry	Social research work on the issue? Gender surveys?
Awareness of inequalities and barriers against women in the society in general and in the industry	
Inequalities identified in the society	Have inequalities affecting women been identified/published/publicised and recognised?
Inequalities identified and addressed by seafood stakeholders	Have this issues been addressed by stakeholders: NGOs, associations, public authorities, private businesses?
Correctives measures and initiatives in the seafood industry	
Taken by the public sector, NGOs and aid agencies	Specific provisions, dedicated projects?
Taken by private businesses	Have private companies developed specific gender related programmes?

5.2. REPUBLIC OF CROATIA

In 2014, the country was ranked 55th out of 142 countries by the Global Gender Gap⁴⁰ established by the World Economic Forum. Results by category place the Republic of Croatia at the 65st rank for women economic participation and opportunity and 56th in political participation.

The Republic of Croatia, formerly a communist country bordering the Mediterranean Sea, is a moderately important seafood nation. The fishing, fish farming and all related industries, including seafood processing and trading contribute to a marginal share of the country’s economic and social welfare. Total landings are estimated at 80 000 tonnes, of which 30 000 tonnes are marine and fresh water aquaculture products⁴¹.

5.2.1. Knowledge about women’s participation in the seafood industry

Quantitative data

All data related to this industry is gathered and analysed by the Directorate of Fisheries of the Ministry of Agriculture, Fisheries and Rural Development.

⁴⁰ The Global Gender Gap Report benchmarks national gender gaps of 142 countries on economic, political, education and health based criteria. The methodology and quantitative analysis behind the rankings are available here: <http://reports.weforum.org/global-gender-gap-report-2014/part-1/the-global-gender-gap-index-2014/>

⁴¹ www.mps.hr/ribarstvo/default.aspx?id=45

Aquaculture: The number of workers by sex is, since recently, collected from farmers once a year and sent to the Ministry of Agriculture, Directorate of Fisheries. They are not published regularly, but are available.

Table 10. Republic of Croatia: Labour force in aquaculture

		2011	2012	2013
Full time	Men	942	1 007	1 035
	Women	143	144	111
	Percentage women	13%	13%	10%
Part time	Men	251	252	248
	Women	35	11	11
	Percentage women	12%	4%	4%

Source: Directorate of Fisheries, Aquaculture Unit.

In April 2013, the Scientific, Technical and Economic Committee for Fisheries (STECF, 2013b) indicated that *“nothing is mentioned concerning the employment data by gender. The Republic of Croatia should be aware that this gender specific data collection has to be done not only for aquaculture but also for the processing industry. A brief confirmation that the Republic of Croatia will be aware of the gender specific employment data collection should be sent to the Commission.”* A few months later the national authority responsible for implementing the National Data Collection Programme as the National Correspondent – the Ministry of Agriculture, Directorate of Fisheries – confirmed *“The Republic of Croatia is aware of the necessity to collect data on employment by gender. Since no disaggregation at this level is available from the Croatian Bureau of Statistics data for the fishery industry (including processing and aquaculture), data on this element shall initially be collected by way of a questionnaire for initial assessment.”* (Croatia, 2013).

In 2008, the Central Bureau of Statistics adopted the new *National Classification of Occupations* in which, for the first time, all occupations are stated in both the male and female gender, which has created the conditions for a balanced representation of men and women in the labour market and for the elimination of gender role stereotypes.

To date, sex disaggregated data are partially available. They only indicate the number of personnel by activity, without informing about the level of education, the level of the job, the qualifications, the role and responsibilities.

Qualitative data

Social studies on gender in the Croatian society are carried out by several universities and departments (Center for Women’s Studies, Zagreb; Zenska Infoteka, the Women’s Information Documentation and Resource Center, Zagreb). Yet, specific situations in the fishing and the fish farming sectors have attracted very little attention from researchers, sociologists or anthropologists. Out of the tens of articles published in the newsletter of The Croatian Sociological Association in the period from January 2011 to April 2014, no article was devoted to women’s participation in the seafood industry⁴².

⁴²Academic Publications of Croatia Sociological Association Members.
www.hsd.hr/web/en/newsletter

All major issues remain to be investigated.

5.2.2. Awareness of gender inequalities

In the society

Under the pressure of the United Nations and more recently the European Commission, the Republic of Croatia started tackling the issue of gender inequity and role of women in the society.

Article 3 of the Constitution of the Republic of Croatia places gender equality among the highest values of the constitutional order. In December 1997, the Croatian Commission for Gender Equality produced the first National Policy for the Promotion of Gender Equality by taking as a starting point the Beijing Platform for Action. In March 2001, the Committee for Gender Equality in the Croatian Parliament was established. In 2006, following a Government proposal, the Croatian Parliament adopted the National Policy for the **Promotion of Gender Equality**. In 2008, the Croatian Parliament passed the new Gender Equality Act with the provisions of the relevant international standards and the directives of the European Union concerning gender equality. Yet, results of research undertaken in 2009, 2010 and 2013 show that most citizens, especially in rural areas, do not know that the Gender Equality Act exists, nor that gender discrimination is punishable by law. It is felt necessary to run a variety of campaigns *“aimed at raising the level of knowledge and awareness of the public on gender equality.”*⁴³

The effort to regulate this area with a series of measures, protocols and laws is not yet completed.

In the seafood industry

According to our knowledge, this issue has not been addressed by the industry.

5.2.3. Correctives measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

In recent times, ministries, local government bodies and NGOs have been implementing various programmes aimed at strengthening women’s entrepreneurship and the economic empowerment of women. The Ministry of Economy, Labour and Entrepreneurship (MELE) is continuously providing financial support through a project entitled “Women’s Entrepreneurship”. Women have also had the opportunity to participate in other projects, such as “Education for Entrepreneurships”, “Strategic Entrepreneurship” and “Creating an Existence” project. The Ministry of the Economy, Labour and Entrepreneurship, and the Government Office for Gender Equality are financially supporting an Internet portal for women entrepreneurs.

⁴³ Croatia, 2014.

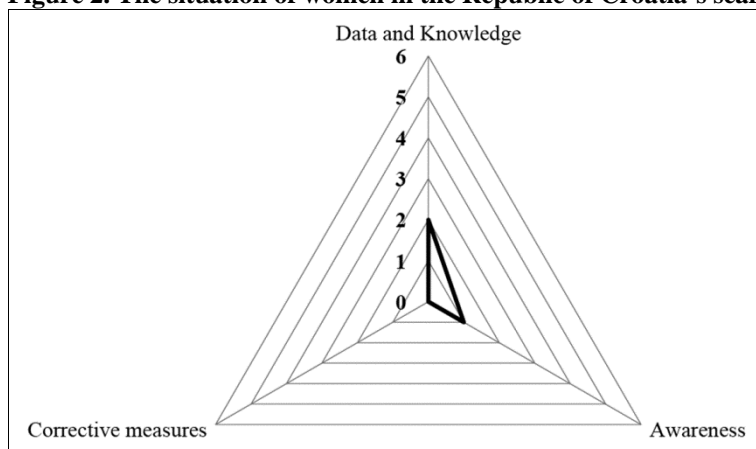
Initiatives taken by the seafood industry

According to our knowledge, no specific actions in the fishing and aquaculture industries have been developed by the industry.

Table 11. The situation of women in the Republic of Croatia’s seafood industry

Knowledge of women’s participation, gender-based roles and power distribution in the seafood industry			2
	Gender distribution: sex disaggregated data	1	
	Knowledge on gender relationships	1	
Awareness of inequalities and barriers against women			1
	Inequalities identified and disseminated in the society at large	1	
	Inequalities addressed by industry’s stakeholders	0	
Correctives measures and initiatives in the seafood industry			0
	Taken by the public sector, aid agencies NGOs	0	
	Taken by private players in the industry	0	

Figure 2. The situation of women in the Republic of Croatia’s seafood industry



5.3. ARAB REPUBLIC OF EGYPT

Egypt is the largest producer of aquacultured fish in Africa with nearly one million tonnes landed every year and women represent less than 1 percent of the over 150 000 people employed in the fisheries and aquaculture sectors (Abu Hatab, 2014).

5.3.1. Knowledge of women’s participation in the seafood industry

The participation of women in the Arab Republic of Egypt’s seafood industry is very poorly documented. They are said to be important players in Egyptian fisheries (Kantor and Kruijssen, 2014) and in formal and non-formal fresh fish retailing. By contrast, they are absent in the aquaculture and farmed fish wholesaling domains (El-Ganainy, 2007).

Quantitative data

We only found precise sex segregated data in surveys run by consultants in specific projects. Unfortunately the geographical and professional scope of these research studies is too limited to be used here. There is “*almost complete absence of gender disaggregated data across the fisheries and aquaculture value chain*” (Abu Hatab, 2014).

Qualitative data

When it comes to the description and analysis of gender role distribution in the seafood industry, only sparse knowledge is available. The issue has been almost completely neglected by researchers.

Several project reports produced by the Consultative Group for International Agricultural Research – Livestock and Fish (CGIAR) or affiliated organisations (WORLD FISH in fisheries and aquaculture) have investigated the position of women.

The sum of these data is unfortunately far from enough to get a precise picture.

5.3.2. Awareness of inequalities

In the society

Gender inequality in the Arab Republic of Egypt is extremely high. In 2014, the country was rated 129th out of 142 countries by the Global Gender Gap established by the World Economic Forum. Results for women’s participation in the economic and political arenas ranked the country at 131st and 134th position respectively.

Until the Arab revolution, women in the Arab Republic of Egypt were in principle protected by a number of laws and policies, but implementation was inconsistent (World Bank, 2009). Today, women in the country face endemic violence in the public sphere and at home. Discrimination and inequality are ubiquitous. This has been proven by various reports commissioned by international organisations (Amnesty International, 2015).

In early 2014, the newly enacted constitution established equality for all citizens and dictated that the State shall ensure the achievement of equality between women and men in all civil, political, economic, social, and cultural rights. The 2014 Constitution established the foundation of the National Council for Women⁴⁴.

In the seafood industry

To our knowledge, this issue has not yet been addressed by the industry.

⁴⁴ www.genderindex.org

5.3.3. Correctives measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

We did not find traces of public action in favour of reducing discrimination, nor stimulating women empowerment in the seafood industry. It is thus important to note fragmented initiatives of development agencies to stimulate women empowerment, including in the seafood industry. The theatre workshop, organised for helping fresh fish women retailers to fight the unfair attitude of market rulers⁴⁵ is an interesting example.

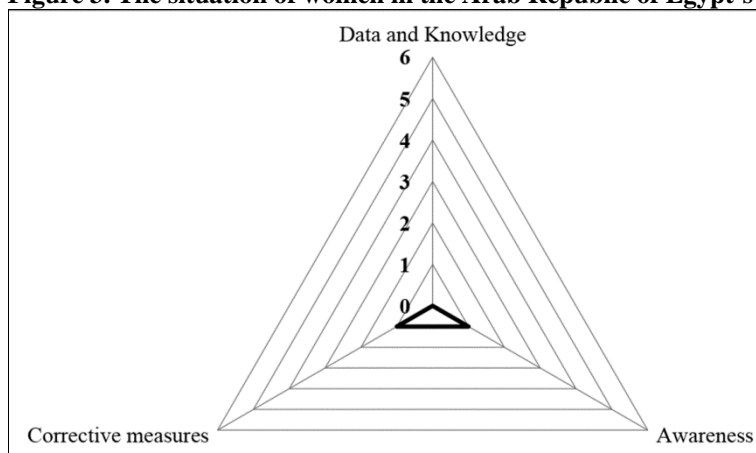
Initiatives taken by private stakeholders

The private sector consists mainly of small scale or very small scale enterprises, which have no specific human resource concerns.

Table 12. The situation of women in the Arab Republic of Egypt's seafood industry

Knowledge of women's participation, gender-based roles and power distribution in the seafood industry			0
	Gender distribution: sex disaggregated data	0	
	Knowledge on gender relationships	0	
Awareness of inequalities and barriers against women			1
	Inequalities identified and disseminated in the society at large	1	
	Inequalities addressed by industry's stakeholders	0	
Correctives measures and initiatives in the seafood industry			1
	Taken by the public sector, aid agencies NGOs	1	
	Taken by private players in the industry	0	

Figure 3. The situation of women in the Arab Republic of Egypt's seafood industry



⁴⁵ <http://worldfishcenter.org/content/community-theatre-inspires-women-fish-retailers-egypt#.VGQoc5OUfZS>

5.4. THE FRENCH REPUBLIC

The French Republic is a moderate fishing nation with *circa* 500 000 tonnes landed every year, and some 250 000 tonnes of farmed aquatic products produced, which include important quantities of farmed bivalves (oysters and mussels). Up to now, French stakeholders of the seafood industries have been remarkably oblivious to gender issues, in contrast to public institutions.

In 2014, the country was ranked 16th out of 142 by the Global Gender Gap established by the World Economic Forum. The French Republic was placed at 57th position for women's economic participation and opportunity and at 20th position for political participation.

5.4.1. Knowledge on women's participation in the seafood industry

Quantitative data

Sex disaggregated data are not systematically collected and very few data are available to describe the participation of women in the fisheries, fish and shellfish farming and related activities. The last data regarding women in fisheries dates back to 2008 (Agefos, 2008). It gives the number of women by type of boat and number of women by age and regions. Census data on professional women who operate as beach fishers exist with local fishermen organisations, but are not centralized.

No sex disaggregated data exist for the fresh fish processing activity (fresh fish trade), the chilled produce manufacturers (Adepale), or the seafood traders. The French fish processing sector encompasses 311 companies which employ 15 590 workers (Girard, Montgruel and Le Moing, 2009). Female employees represent the majority (56 percent) of all workers (STECF, 2012).

Qualitative data

Few social researchers have investigated the participation of women in fisheries and the seafood industry. In the eighties and nineties, Aliette Marianne Geistdoerfer, ethnologist attached to the French National Centre for Scientific Research (CNRS) carried out several studies on fishermen's wives in different populations in the North Atlantic, including the French Republic. More recently, Katia Framgoudes, social scientist at the University of Brest has found evidence that French fishers' wives played an important role within fisheries enterprises, but often with no specific status, until this contribution became legally recognized with the creation of "the collaborative spouse status"⁴⁶ (CSS) in 1997. Katia Framgoudes, who is pro-active on this issue, is one of the founders of the European association, AKTEA.

The focus of most French research has been on fishermen's wives, their assistance to their husband's work and their status. Very little work has been undertaken on other situations. Despite the importance of women in the processing businesses (fresh fish processing, canneries or preparation of chilled ready meals) the gender aspect of the value chain has never been investigated.

⁴⁶ Wives of fishermen undertaking tasks for fishing enterprises on the shore and having a legal status in accordance with the EC directive 86/613.

5.4.2. Awareness of gender inequalities

In the society

Forty years after the second wave of feminism burst in the French Republic, gender discrimination is still very vivid in today's French society, and has effects on women's involvement in both social and private spheres. In the past years, prompted by successive governments, the French Republic has made progress in terms of institutional and legal gender equality. The impact on the Gender Index has been quite radical, as the French Republic *"is the country with the highest improvement on the "legislators, senior officials and managers" indicator over the past nine years."*⁴⁷

In the seafood industry

The French Republic has been short of fishermen for several years. In 2013, 297 foreigners (Agefos, 2013) complemented the national labour force. Neither the fishermen's association nor the training institutions have considered promoting the work to women. In the public document that advertises the positions of fishermen or aquaculture technicians, no incentives are given to women to consider taking up these careers.

Women's participation in the seafood industry was totally absent from the stakeholders' agenda, up to this year, with the new EU gender-sensitive criterion in subsidies distribution. If not for the European pressure, and apart from the few sociologists working on the issue, no one in the industry is ready to consider women equality and gender specific issues.

5.4.3. Correctives measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

In March 2015, the Fisheries Directorate published a very interesting book containing portraits of 42 women working in the seafood industry. These women, who are fisherwomen, fish farmers, processing plant or other support service workers, share their experiences and try to attract more women to join the industry. *"I hope these portraits will stimulate the desire of young women to work in the industry"* said Cécile Bigot, director of fisheries and aquaculture affairs at the Ministry of Sustainable Development, in her introduction to the book that she inspired.⁴⁸

Initiatives taken by private stakeholders

To our knowledge, neither trade unions nor private companies have set up specific motivation or empowerment programmes for women in the seafood industry.

The new EMFF attribution rules should encourage stakeholders to consider this issue.

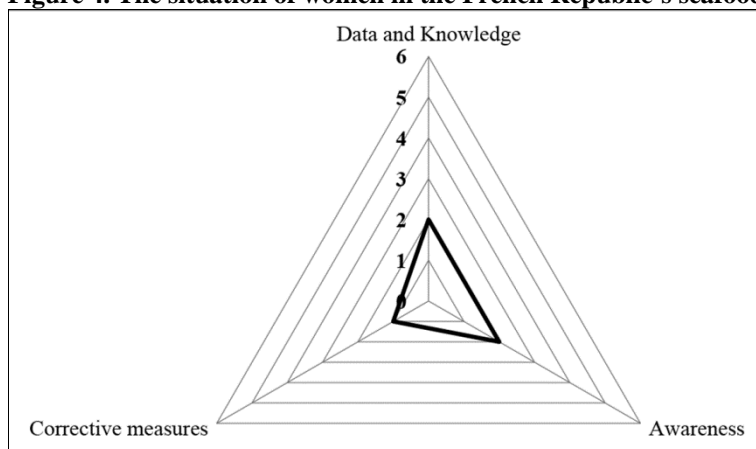
⁴⁷ <http://reports.weforum.org/global-gender-gap-report-2014/report-highlights/>

⁴⁸ Femmes de mer - 42 Portraits de Femmes travaillant dans les secteurs de la pêche et l'aquaculture, 96 pp.

Table 13. The situation of women in the French Republic’s seafood industry

Knowledge of women’s participation, gender-based roles and power distribution in the seafood industry			2
	Gender distribution: sex disaggregated data	1	
	Knowledge on gender relationships	1	
Awareness of inequalities and barriers against women			2
	Inequalities identified and disseminated in the society at large	2	
	Awareness of inequalities in the seafood industry	0	
Correctives measures and initiatives in the seafood industry			1
	Taken by the public sector, aid agencies and NGOs	1	
	Taken by private players in the industry	0	

Figure 4. The situation of women in the French Republic’s seafood industry



5.5. REPUBLIC OF ICELAND

In the Global Gender Gap Report⁴⁹ for 2014, the Republic of Iceland is ranked number one for the fifth consecutive year. Notwithstanding these outstanding results, the gender issue remains high on the public policy makers’ agenda as full equality is still ahead and challenges are yet to be addressed (Centre for Gender Equality Iceland, 2012).

5.5.1. Knowledge’s on women’s participation in the seafood industry

Quantitative data

The Republic of Iceland is a rich fishing nation where total landings reached 1.4 million tonnes in 2013, and employed 3 600 workers. In addition, the fish processing sector employs 5 000 persons. All employment statistics generated by the official statistics department are gender disaggregated.

⁴⁹ The OECD Social Institutions and Gender Index (SIGI) focuses instead on the underlying drivers of these inequalities.

Table 14. Republic of Iceland: Number of employees in fishing and fish processing industries, 2008–2013

		2008	2009	2010	2011	2012	2013
Fishing	Men	3 800	4 400	5 000	4 900	4 600	3 200
	Women	400	300	300	300	300	400
	Percentage women	10%	6%	6%	6%	6%	11%

		2008	2009	2010	2011	2012	2013
Fish processing	Men	1 900	1 900	1 800	2 100	2 400	2 600
	Women	1 100	1 300	1 500	1 600	1 800	2 400
	Percentage women	37%	41%	45%	43%	43%	48%

Source: www.statice.is

Table 15. Men and women as CEOs and Board Members of Icelandic fishing and fish processing companies in 2013

		Men	Women	Percentage women
Fishing	CEOs	689	90	12%
Fish Processing	CEOs	185	23	11%
Fishing	Board Members	1505	722	32%
Fish Processing	Board Members	510	193	27%

Source: www.statice.is

Qualitative data

Social studies on gender perspectives in the seafood industry are rather recent. They date back to the nineties with works of anthropologist Gísli Pálsson, on *Women's Position in Icelandic Fishing Villages*. A few years later, sociologist Gubjörg Linda Rafnsdóttir conducted a study on the status of fish processing women and their perceptions on income and their affiliation to women's labour organisations. During the same period, anthropologist Unnur Dís Skaptadóttir focused on the social construction of gender and gender based division of labour within the fishery industry.

More recently the impact on women of the individual transferable quota system, which was implemented gradually from 1980, was examined by anthropologist Hulda Proppé. According to her studies, no woman was publicly involved in the decision making of the implementation of the new fishery resource regulation system and no woman were selected as member of public committees (cited by Anna Karlsdóttir in Sloan *et al.*, 2004).

Representation of women in seafood companies is partially documented. In complement with official data, an examination with a gender lens of who runs companies reveals that in large scale units, women are rare in decision making positions, but it is quite common to find them managing smaller-scale companies. Our observation, made in early 2015, begs for further investigation, to determine the reasons for what looks like a strong gender disparity. Are women not interested to take decision making positions, or are the board members selection rules favouring men?

Table 16. The top three seafood companies in the Republic of Iceland

Company	CEO	Total Board Members	Female Board Members
Icelandic Group	Male	5	2
Samherji	Male	9	0
Iceland Seafood International	Male	10	0

Listed in the 100 First World Seafood Companies, 2014.

Source: Individual company website.

It is important to note that many of the smaller scale fish related companies are run by women.

Table 17. Icelandic companies headed by women

Company	Name	Position
Lysi hf	Katrín Pétursdóttir	Managing Director and Owner
Einhamar Seafood	Helena Sandra Antonsdóttir	Office Director and Co-owner
Valafell	Kristín Vigfúsdóttir	Managing Director and Founder
Marz Seafood	Erla Björg Gudrunardóttir	Owner and Founder
Iceland Fish Online	Hafdís Vilhjálmsdóttir	Owner
Codland	Erla Ósk Pétursdóttir	Managing Director
Ice Protein	Hólmfríður Sveinsdóttir	Managing Director

Source: Personal collection.

Quantitative and qualitative information and analysis of women's participation in the industry as a whole and of the value chain distribution exist but are not yet complete.

5.5.2. Awareness of inequalities

In the society

Established in 1907, the Icelandic Women's Rights Association (IWRA) was the first formal organization of Icelandic women focusing its efforts on the struggle for political equality between men and women, as well as equal opportunities in education and profession. The Icelandic society is very aware of the importance to give everyone the same chances and opportunities. It is often taken as an example of good practices and excellent results. The country was the first in Europe to be ruled by a female president (Vigdís Finnbogadóttir, from 1980 to 1996).

The legislative and institutional apparatus designed to prevent gender inequality is very developed.

The Parliament approved in 2011 a new Plan of Action on Gender Equality for the period 2011–2015. Especially, the aim of having women take more part in managerial and influential positions in the Icelandic labour market is still a zone for improvement (Beijing, 2014). In the light of this fact, in 2010 the Government introduced a provision on gender proportions in the boards (at least 40 percent of each gender) of limited companies with more than 50 employees to take effect from 1 September 2013.

In the seafood industry

It is said that technological development within the fishing processing industry, increased automation of fish processing; new generations of fish processing lines require less labour, for example within filleting and trimming where a lot of the women within fish processing work and made jobs redundant. We did not find any documented reports on this commonly mentioned fact.

According to education experts, the fishing industry (technology, technical innovation) may be less attractive to women compared to other industries⁵⁰.

Women are prime level politicians, and occupy all position, including prime minister. It is yet interesting to note that the portfolios of Agriculture and Fisheries⁵¹ have never been held by a woman.

5.5.3. Corrective measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

Despite the crucial role of fisheries and related industries for the country, it is believed that not everything has been done to offer women equal conditions compared to men. As everywhere else in the world, the presence of women in the seafood industry has not been broadcast and they remain remarkably invisible.

Initiatives taken by private stakeholders

In 2013, Konur í sjávarútvegi, an association of women in the seafood industry, was established under the initiative of Hildur Sif Kristborgardóttir, a woman involved in the industry as a publisher. Starting from the point where the numerous Icelandic women who work in the industry did not know each other, as men do, after a first meeting the association was set up. It today gathers 124 women from 74 seafood related companies in Iceland, involved in technology, sciences, sales, marketing and more. The board comprises 10 women and the fisheries Secretary of State. The association's long term goals are:

- To bring women in the fishing industry together and create a strong network within them. Get to know the women in the company and the company they work in;
- To create a supportive network directed at woman;
- Better understand the jobs they are involved in;
- To enhance visibility of women and participate to make this industry attractive to young women.

⁵⁰ *Source:* University Reykjavik, personal communication, December 2014.

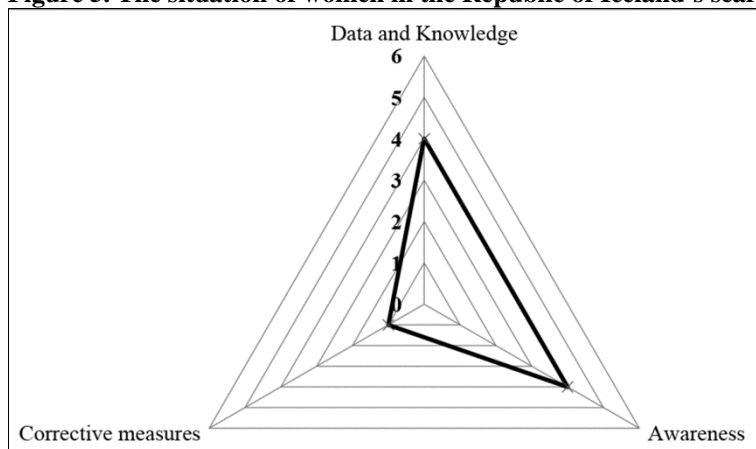
⁵¹ Beijing, Iceland 2014.

Table 18. The situation of women in the Republic of Iceland’s seafood industry

Knowledges of women’s participation, gender-based roles and power distribution in the seafood industry			4
	Gender distribution: sex disaggregated data	2	
	Knowledge on gender relationships	2	
Awareness of inequalities and barriers against women			4
	Inequalities identified and disseminated in the society at large	3	
	Awareness of inequalities in the seafood industry	1	
Correctives measures and initiatives in the seafood industry			1
	Taken by the public sector, aid agencies and NGOs	0	
	Taken by private players in the industry	1	

The presence of women in the seafood industry is partially documented. The Icelandic society believes strongly in equality, and the value of women in the society is acknowledged and receives equal attention from public authorities. Yet, women’s participation in the seafood industry is not fully acknowledged. The gender gap seems to be thin, therefore corrective measure are absent. Yet further investigations would help to understand how attractive and hospitable the industry is to women.

Figure 5. The situation of women in the Republic of Iceland’s seafood industry



5.6. REPUBLIC OF INDIA

Gender inequality in the Republic of India is extremely high. In 2014, the country was rated 114th out of 142 countries by the Global Gender Gap. Results by category are very contrasting with women’s economic participation and opportunity coming at 134th position in the world, whilst it shines at the 15th position for women in politics. The Republic of India is a country of contrasts, where women can hold top positions as president, prime minister, leader of the opposition, and where brutality to women is also atrociously high.

5.6.1. Knowledge of women's participation in the seafood industry

Quantitative data

Some data collected by and for the Marine Fisheries Census indicate an estimated number and proportion of women at the different parts of the industry. In 2010, the Fisheries Census established by the Central Marine Fisheries Research Institute indicates the number of women by working activity: labourer/ marking and repairing nets/ curing-processing/ peeling (shrimps)/ others.

Qualitative data

The status, role and power (or lack of it) of women in fish processing, fisheries and, to a lesser extent, in aquaculture have been studied. Numerous articles investigate these topics on an activity in one region or another. The Republic of India seems to be one of world's most scrutinized countries in the field. This is the result of the influence of charismatic and inspirational champions in gender equality, the presence of the active ICSF (International Collective in Support of Fishworkers), and the subsequent organization of several regional workshops since the nineties.

Several high profile and internationally renowned researchers contributed to inspire gender research in the field, among them Dr M.C. Nandeesh, a pioneer at raising awareness on the importance of women in Asian and global fisheries, and stimulating activities for addressing gender inequality; Dr Nikita Gopal, Senior Scientist, Central Institute of Fisheries Technology, Cochin, co-organiser of the GAF5 conferences on gender in fisheries; Chandrika Sharma⁵², Executive Secretary, ICSF and Publisher of SAMUDRA and YEMAYA Reports; And Nalini Nayak, a founder member of ICSF, current general secretary of the Self Employed Women's Association in Kerala, and above all a feminist activist involved with coastal communities.

The Republic of India has hosted several fisheries and aquaculture symposia dealing with gender problems, of which the very first in 1990 entitled "Women in Fisheries in India", was held at the 2nd Indian Fisheries Forum in Mangalore. A workshop on "Gender in Fisheries: a Future Roadmap" was organised in 2012 at the Central Institute of Fisheries Technology, Cochin by Nikita Gopal, Arathy Ashok, Jeyanthi, P., Gopal, T. K. S. And Meenakumari, B., and a workshop on "Women Fish Vendors in Mumbai" was organised by the ICSF in 2013 at the Tata Institute of Social Sciences. Recently, in November 2014, the fifth edition of Gender in Aquaculture and Fisheries took place in Lucknow in the state of Uttar Pradesh.

All these events contribute to raise interest on these questions in the academic and development project scene and inspired a large number of research studies. The sum of this fragmented and dispersed information is non-exhaustive. A lot still remains to be done, to raise the knowledge and understanding, but the Republic of India appears to be a very advanced country in the matter.

⁵² Chandrika Sharma tragically disappeared in the missing Malaysian Airlines MH370 flight on 8 March 2014.

5.6.2. Awareness of inequalities

In the society

Unequal access to education, capital, property and culture for boys and girls is now widely acknowledged. In recent years, the Republic of India has been confronted by one dark aspect of its social fabric where violence against women is prevalent. Deep rooted gender inequalities continue to undermine the country's potential to translate economic growth into inclusive development.

In October 2014, the UN Women launched a campaign, aimed at ensuring greater participation of men in promoting women's rights and gender equality. The Ministry of Women & Child Development (WCD) has started initiatives to empower women including: the one-stop crisis centres for women, the national mission on malnutrition, and the '*beti bachayo, beti padhayo*' ("protect the girl, educate the girl") campaign.

In the seafood industry

Several events have been organised to allow academic researchers on gender issues in the industry to gather and exchange information and results. Whether these findings have been disseminated to public authorities and seafood entrepreneurs, the real stakeholders, is uncertain.

5.6.3. Correctives measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

The women's SHG model is a home grown Indian scheme. It is based on the principles of self-help, self-management, self-responsibility and self-reliance. In the mid-1980s, there were a few pilot experiments, mostly in Andhra Pradesh and other Southern states. Women's Self Help Groups represent an original social-economic structure, the objective of which is to organise mutual help and benefit for a small (10 to 20 members) homogeneous group. Key instruments widely spread in India for supporting women's empowerment are often facilitated by NGOs and supported by local governments. Several seafood projects run by SHGs have proved to be successful (www.genderaquafish.org).

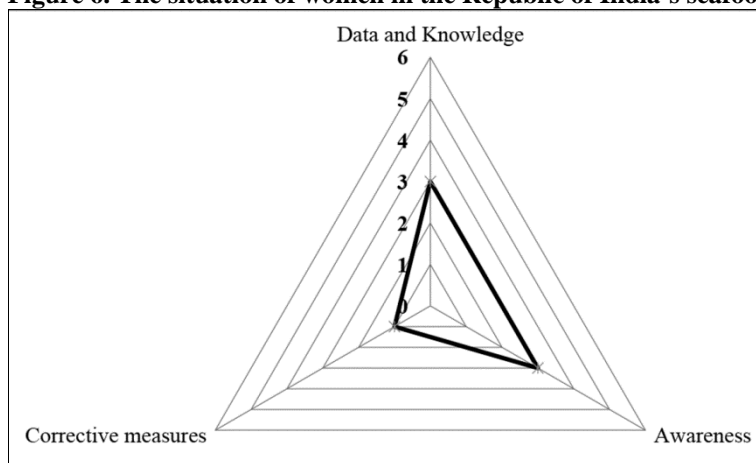
Initiatives taken by private stakeholders

To our knowledge, no private companies have launched specific programmes for women education or women empowerment.

Table 19. The situation of women in the Republic of India seafood industry

Knowledge of women’s participation, gender-based roles and power distribution in the seafood industry			3
	Gender distribution: sex disaggregated data	1	
	Knowledge on gender relationships	2	
Awareness of inequalities and barriers against women			3
	Inequalities identified and disseminated in the society at large	2	
	Awareness of inequalities in the seafood industry	1	
Correctives measures and initiatives in the seafood industry			1
	Taken by the public sector, aid agencies and NGOs	0	
	Taken by private players in the industry	1	

Figure 6. The situation of women in the Republic of India’s seafood industry



5.7. REPUBLIC OF SENEGAL

The Republic of Senegal is an important fishing nation on the Western coast of Africa. Over the past thirty years, it has attracted remarkable attention from other fishing nations, as well as international aid agencies (FAO, UNDP, USAID, AFD and Belgian Italian, Canadian and Japanese development agencies, to only mention some of them). The challenges that the industry and its workers face are well documented.

Women play a central role in the fishing communities in Western African countries and it has been recognised and documented since the mid-nineties.

5.7.1. Knowledge’s of women’s participation in the fisheries industry

Quantitative data

The participation of women in the Senegalese fisheries industry is partially documented. Sex disaggregated statistics are not systematically collected. Local or regional field reports

provide rather good quantitative descriptions at the moment of their production but become rapidly out-dated. Undeclared working women are rarely taken into account.

Qualitative data

The participation of women in the Senegalese fish and shellfish processing sectors, their capital and human endowment, their duties, responsibilities and relationship with other business counterparts is rather well documented. The sum of knowledge offers a rather good understanding of the role of women in the Senegalese seafood industry.

5.7.2. Awareness of inequalities

In the society

In 2010, the Republic of Senegal enacted absolute gender parity in the country (Law N02010–11). This law covers all electoral lists, but leaves out decision making bodies, where people are appointed, such as the government or business centres. In 2012, the Republic of Senegal adopted a rule of “total equity” between men and women.

In 2014, the country was rated 77th out of 142 countries by the Global Gender Gap for gender inequality. Results by category rank the country No. 71 in women’s participation in economics and opportunity, and 24th for political involvement. The Beijing +20 report produced in 2014 (UN Women, 2014), stresses all efforts and improvements made by the Senegalese institutions on the promotion of gender equality but highlights the gap between intentions and the deeply ingrained cultural constraints. The legal rules supporting gender equality are voted for by policy makers, but societal behaviour has not completely embraced the concept.

In the seafood industry

More specifically in the seafood sector, it is recognised that women are excluded from the decision making arenas (Deme, 2014; WWF, 2012).

More recently it has been seen that they face growing difficulties to get access to the fish resource (new rising competition from large scale buyers), to maintain their facilities under the pressure of new entrants (access to land). As a consequence, in the past 5 years, some women have lost their status of entrepreneurs and today are employed as workers⁵³.

5.7.3. Correctives measures in the seafood industry

Initiatives taken by public institutions, donor agencies and NGOs

The institutions and local NGOs are well aware of the discriminations that women experience in the seafood industry. They show intentions to correct the inequality. But behind the positive rhetoric, still a lot needs to be done. For instance, the activities of women as major local market players are not taken into account in the fishing agreements that the country signs with harvesting nations (EU, Russia).

⁵³ Enda Graf Sahel 2012.

In 2012⁵⁴, the development programme for fisheries and aquaculture, elaborated by the Prime Minister’s office, included several specific actions dedicated to women. We did not access the details on the implemented programme, and cannot assert that these women specific empowerment initiatives existed.

Donors’ agencies are active in the Republic of Senegal’s maritime development, and some projects are designed for the education, promotion or empowerment of women. Here is a selection of them. In the period 2008 to 2011, the Japanese International Cooperation Agency ran a capacity enhancement for women and children, with focus on fish processing carried out by women⁵⁵. In 2009, the French Research Institute (IRD) in cooperation with the Foundation Internationale du Banc d’Arguin ran a project to enhance women’s knowledge and capacity to exploit and add value to shellfish⁵⁶. In 2011, USAID/COMFISH started a project that targeted women and introduced to them pioneer eco-friendly fish processing methods. The aim was clearly to boost their incomes. The project is managed by the Coastal Resources Center at the University of Rhode Island Graduate School Of Oceanography. It works across the Republic of Senegal to increase the resilience of coastal communities to climate change and to build an ecosystem-based management plan for six priority fish species, which provide much of the dietary protein for people in Senegal⁵⁷. As part of the World Bank six year project (2013-2019) “Casamance Development Pole Project for Senegal”, the specifically women-led ‘Oyster Farms Foster Sustainable Development in the Republic of Senegal’ was launched. It is financed by the country’s Agence National de l’Aquaculture (National Aquaculture Agency or ANA) and the World Bank. The goal is to help these women achieve financial independence and enable them to meet the needs of their families⁵⁸.

Initiatives taken by private stakeholders

Table 20. The situation of women in the Republic of Senegal’s seafood industry

Knowledges of women’s participation, gender-based roles and power distribution in the seafood industry			3
	Inequalities identified and disseminated in the society at large	1	
	Knowledge on gender relationships	2	
Awareness of inequalities and barriers against women			3
	Awareness of inequalities in the society	2	
	Awareness of inequalities in the seafood industry	1	
Correctives measures and initiatives in the seafood industry			2
	Taken by the public sector, aid agencies and NGOs	2	
	Taken by private players in the industry	0	

⁵⁴ Primature, 2012.

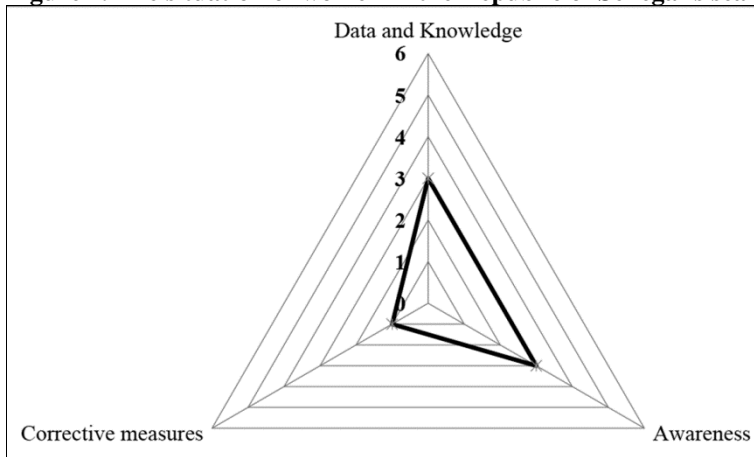
⁵⁵ JICA, 2008. Women and Children Capacity Enhancement, Guet Dar, Fishing community in St Louis coastal city.

⁵⁶ RAP LEMAR, 2011.

⁵⁷ www.usaid.org

⁵⁸ www.worldbank.org

Figure 7. The situation of women in the Republic of Senegal's seafood industry



When researching data on the Republic of Senegal, it does not take long to understand that women play a key role in the Senegalese fisheries as processors and local markets suppliers, that they are thus fragile players with little power to participate in the coming development and are threatened by what appears to be the business model chosen by the authorities (industrial processing, export oriented in the context of globalisation). In this context, the government is vocal about what should be done and donor agencies have launched some projects, but much remains to be promoted.

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