
**PONLOK CHOMNES:
DATA AND DIALOGUE FOR DEVELOPMENT
IN CAMBODIA**

**Gender Equality and Social Inclusion
(GESI)
Research Strategy Training**

Reading Material

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Foreword

This Research Strategy training support material has been developed as an additional resource for participants of the two Gender Equality and Social Inclusion (GESI) Research Strategy Trainings conducted in June 2020. This resource contains additional information, references, and links that will add to the knowledge gained during the sessions. This new version also considers suggestions and comments provided by the participants of the two virtual training sessions.

The GESI Research Strategy Training used an online format because of the unique and unexpected circumstances due to the COVID-19 pandemic. This online training allowed the participants to join virtually but posed some challenges, including time constraints and connectivity issues.

Therefore, this compendium was designed to make all the training content available to the participants. It will also serve as a more comprehensive resource to provide references, more in-depth approaches, links to useful information, case studies, and exercises developed during the online sessions.

Aim and Scope

During and after the training, many participants asked for further details and inputs concerning issues such as gender mainstreaming, gender analysis, and research methodologies. Because the GESI Research Strategy training focused on the approaches that need to be considered while conducting GESI-oriented research, the team identified a need for a separate resource for participants. This compendium provides additional information that is crucial for GESI. It is not a comprehensive review of gender analytical methods and social research methodologies, but rather an overview of how to do GESI research in practice.

Session 1: Introduction to GESI

“Gender Equality and Social Inclusion (GESI) is a concept that addresses unequal power relations experienced by people on the grounds of gender, wealth, ability, location, caste/ethnicity, language and agency, or a combination of these dimensions. It focuses on the need for action to re-balance these power relations, reduce disparities and ensure equal rights, opportunities and respect for all individuals regardless of their social identity.” (International Dev. Partners Group Nepal, 2017, p 7)

Gender Equality and **Social Inclusion** take into account how diverse and overlapping disadvantages create marginalisation within societies. By recognising this diversity, it is possible to develop strategies and approaches that allow the most vulnerable, marginalised, and excluded groups to gain voice and visibility, and contribute to and receive equal benefits from development. GESI reiterates the pledge of the United Nations Sustainable Development Goals of ‘*Leaving no one behind*,’ and promotes inclusive development (UNDP, 2015b).

GESI was first adopted as a development framework in Nepal, due to the acknowledgment of the great diversity of Nepalese society, including economic disparities, gender discrimination, a system of castes marginalising a number of social groups, and great ethnic diversity with many indigenous groups and minorities. Therefore many GESI resources derive from Nepalese experiences (International Dev. Partners Group, 2017).

1.1. Guiding concepts

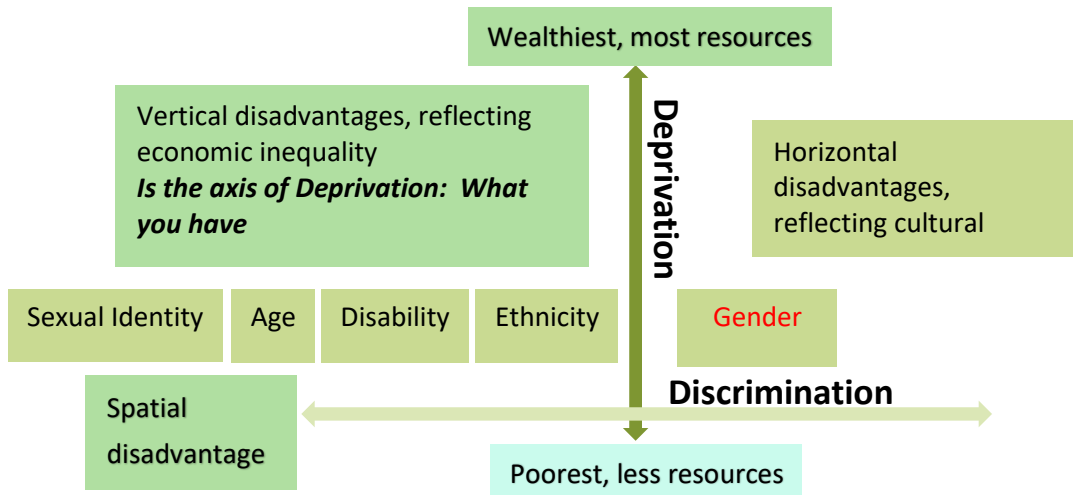
Gender	<i>Refers to the social attributes and opportunities associated with being male and female and the relationships between women and men and girls and boys. These attributes, opportunities and relationships are socially constructed and are learned through socialisation processes. They are context/ time-specific and changeable. Gender determines what is expected, allowed and valued in a woman or a man in a given context. In most societies there are differences and inequalities between women and men in responsibilities assigned, activities undertaken, access to and control over resources, as well as decision-making opportunities. Gender is part of the broader socio-cultural context. Other important criteria for socio-cultural analysis include class, race, poverty level, ethnic group and age (Source: UN Women).</i>
Gender Equality	<i>Refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality does not mean that women and men will become the same but that women’s and men’s rights, responsibilities and opportunities will not depend on whether they are born male or female. Gender equality implies that the interests, needs and priorities of both women and men are taken into consideration, recognising the diversity of different groups of women and men. Gender equality is not a women’s issue but should concern and fully engage men as well as women. Equality between women and men is seen both as a human rights issue and as a precondition for, and indicator of, sustainable people-centred development (Source: UN Women).</i>

Gender Inequality	<i>Refers to the legal, social and cultural situation in which sex and/or gender determines different rights and dignity for women and men, which are reflected in their unequal access to or enjoyment of rights, as well as the assumption of stereotyped social and cultural roles. These affect women's status in all areas of life in society, whether public or private, in the family or the labor market, in economic or political life, in power and decision-making, and in health and security. In virtually all societies, women are in an inferior position to men. Gender inequality represents a general societal aspect, but is experienced differently by particular groups: ethnic, economic, social or identity-based discrimination may overlap with gender inequality to create multiple layers of marginalisation (Source: UNDP, 2015a).</i>
Intersectionality	<i>The interconnected social categorisations such as race, class, and gender as they apply to a given individual or group, creating overlapping and interdependent systems of discrimination or disadvantage. Intersectionality allows to understand the interaction of different social, economic, power structures that determine oppression and /or privilege (Source: C.J.P. Colfer, Sijapati Basnett, & Ihalainen, 2018).</i>
Social Inclusion	<i>Means that all members and segments of a society enjoying equal rights and benefits in the political, economic and social spheres, without discrimination based on sex, age, geographical area, ethnicity, place of origin, educational background, economic status, class, religion, disability, sexual identity, health status, or other factors (Source UN DESA).</i>
Social exclusion	<i>Is the process through which individuals or groups are wholly or partially excluded from full participation in the society in which they live" (Source: Kabeer, 2005). The concept of Social Exclusion originated in Europe in the '70s, but has since gained relevance in development studies and is now the central transformative pledge of the United Nations 2030 Sustainable Development Goals of "Leaving no one behind." The social exclusion framework is "offering an integrated way of looking at different forms of disadvantage which have tended to be dealt with separately in the development studies....and capture the experience of the certain groups and categories 'set apart', 'locked-out' or 'left behind'" (Source: UN DESA).</i>

The **Social Exclusion framework** summarises the multifold aspects of social exclusion:

- The vertical axis of economic inequality takes into account the level of deprivation, **what you have** in terms of resources, income and assets;
- The horizontal axis of discrimination which takes into account **who you are**, based on gender, ethnicity, or other group distinctions;
- Spatial disadvantages take into account **where you are**, or the disadvantages that may derive from confinement in particular places cut out from social, economic, or other exchanges (remote areas, urban slums, etc.)

Figure 1: The Social Exclusion Framework (elaborated from UNESCO, 2016, pp. 51-58)



The different factors that determine social exclusion interact and overlap creating multidimensional forms of exclusion (Kabeer, 2005; Stewart F., in UNESCO, 2016). Poverty determines exclusion at all levels, but groups facing discrimination on other bases will experience extreme marginalisation. Indigenous groups tend to be socially and politically excluded, which determines their economic exclusion, further worsened by their location in remote areas. Being old, young, or a child becomes a factor of marginalisation among groups that face other forms of discrimination. Gender acts as a crosscutting category experienced by all groups, including those with more resources. However, multiple and overlapping discrimination factors determine the level and impact of gender inequality.

Based on this conceptual framework, it is possible to visualise the interactions among the groups that are particularly at risk of exclusion, by considering the risk factors that create multiple layers of discrimination and deprivation. The visual below shows the many categories of risk factors that one might face so that you can see how people can face many factors at once.

Social, and economic exclusion	Women	Poor	IP	Ethnic Minorities	Religious Minorities	Sexual Identity minorities	Persons with Disability	Persons living with HIV	Persons living with HIV	Informal workers, migrants	People living in remote areas	Sex workers	Drug users	Old	Youth	Children	Other
Women	█																
Poor		█															
IP			█														
Ethnic minorities				█													
Religious Minorities					█												
Sexual Identity minorities						█											
Persons with Disability							█										
Persons living with HIV								█									
Informal workers, migrants									█								
People living in remote areas										█							
Sex workers												█					
Drug users													█				
Old														█			
Youth															█		
Children																█	
Other																	█

The UN *Leaving No One Behind* framework that informs the 2030 Sustainable Development Goals is rooted in GESI, and a number of relevant resources have been developed to support and guide action (UNDP, 2016).

1.2. The mechanisms of exclusion

Each society has **values, beliefs, norms, attitudes, and behaviours** that determine who is valued and also, consequently, who is stigmatised, made invisible, and discriminated against based on different characteristics, such as gender, wealth, ethnicity, religion, sexual identity, health status, age, skin colour, etc. These forms of discrimination are seen as legitimate and justifiable by the majority of society and are generally based on consent, not coercion (Kabeer, 2005). Norms, prejudices, stereotypes, and biases shaping discrimination are unwritten attitudes and behaviours based on mainstream societal values and culture, shared by a majority of people and are often done unconsciously.

Gender norms are ideas about how women and men should be and act, representing standards and expectations to which women and men generally conform in a particular society, culture, and community (see [European Institute for Gender Equality Thesaurus](#)).

Gender Stereotypes are preconceived ideas whereby females and males are arbitrarily assigned characteristics and roles determined and limited by their gender. Stereotypes are the cause of deeply ingrained attitudes, values, norms, and prejudices against women. They are used to justify and maintain the historical relations of power of men over women, as well as sexist attitudes that hold back the advancement of women (OHCHR, 2014).

Norms, stereotypes, and prejudices do not shape only gender relations, but also attitudes and behaviours toward social groups, ethnicities, people with disabilities, etc. For example, in many parts of the world, there are harmful ideas that poor people are lazy, indigenous people are backward, lesbian, gay, bisexual, transgender, and intersex (LGBTI) people lack morality, youth are careless and irresponsible, older people are useless, disabled people cannot work, rural people are ignorant, people with darker skin are ugly, etc. These ideas and stereotypes are wrong and damaging.

Norms, stereotypes, prejudices and their derived biases are the objects of significant social psychology studies (Jackson, 2011). Norms, stereotypes, and prejudices are intimately linked to the social, economic, and cultural aspects of a society, and therefore tend to evolve and change with time.

GESI research strategy is centered on the acknowledgment, control, and counteraction of norms, stereotypes, and prejudices that promote gender inequality and social exclusion. GESI research strategies focus on changing these norms and harmful ideas to create more space for gender equality and equality for other marginalised groups.

1.3. Materials for discussion and group exercises

The tools and materials were utilised during the virtual training to encourage reflection, promote discussion, and practice GESI concepts and approaches. During the training, participants were encouraged to share their experiences with and perspectives on GESI in a plenary discussion.

The following videos about unconscious biases, prejudices, and stereotypes were shown to inform plenary and group discussions and to help increase self-awareness about attitudes, behaviors, and changes:

- [Poverty and exclusion bias](#): Brief video showing prejudice related to poverty and status
- [Unconscious biases](#): Video story set within an office showing how unconscious biases about women, disability, and youth influence behavior
- [Too quick to judge](#): Video story about pre-judgment and disability

Session 2: GESI Relevance in Cambodia

The second session reviewed key GESI information that has important repercussions in Cambodia.

2.1. Gender Equality: progress and areas for improvement

During recent decades, gender equality in Cambodia has made significant progress (Ministry of Women's Affairs Cambodia, 2014b). Gender equality is enshrined in Cambodia's legal framework, foremost within its Constitution. Other legal frameworks and policies reflect Cambodia's commitment to gender equality, including the ratification of international instruments such as the Convention for the Elimination of Discrimination Against Women (CEDAW). Cambodia's national body for gender equality, the Ministry of Women's Affairs, is in charge of developing national strategies for the advancement of gender equality and informing other national policies. Gender equality is also entrenched in the decentralisation process, with structures and activities to oversee and ensure gender equality operating at all decentralised levels of government.

Cambodia shows significant participation of women in economic activities and there have been important achievements in terms of equal access to education, with Cambodia meeting its Millennium Development Goals target for girls' education, as well as in women's access to health services (ibid). Among other factors that contribute to gender equality, there is a lack of widespread norms or values that promote child sex preference (preferring to have male children over female children) or discriminatory practices in terms of inheritance and property. In fact, the law ensures the registration of land in the name of both spouses.

Despite these achievements, there are areas where progress has been limited. Exclusion of women from the public sphere and decision-making positions persists, particularly within the highest government positions or in particular areas, such as the Judiciary. Women form the majority of informal workers and are crowded in insecure, dead-end, or dangerous jobs. Women's double role as economic actors and primary caregivers, entrenched in societal norms, also restricts their development. Gender stereotypes continue to underestimate women's knowledge, capacity, and skills. Gender-based violence (GBV) and violence against women (VAW) remain a significant societal problem (Ministry of Women's Affairs Cambodia, 2014b).

Among women in Cambodia, there are groups that are particularly vulnerable or at risk of exclusion (Ministry of Women's Affairs Cambodia, 2014a):

Marginalised Women's Groups

- Women in poverty, rural and urban, landless, labourers, beggars, rubbish collectors;
- Women in low-paid, dead-end jobs, like garment factory workers;
- Women in informal jobs or dangerous jobs, like domestic workers, entertainment workers, sex workers;
- Women migrants;
- Elderly women, widows, heads of household;
- Abused women and victims of violence against women;
- Indigenous women;
- Female ethnic minorities;
- Women living with disabilities;
- Women living with HIV/AIDS;
- Lesbians, Bisexuals, and Transgender people;
- Women in prisons;
- Women on substances or with partners using illicit drugs or alcohol;

2.2. Poverty

Cambodia has seen great progress in reducing the national poverty rate (defined as living on less than US\$1.90 a day) from 53% in 2004 to 20.5% in 2011, and 13.5% in 2014, and the downward trend is continuing (World Bank, 2019). However, the World Bank notes that the reduction in poverty during the last five years has slowed, with some groups (the urban poor) benefiting less from economic growth. A recent analysis of multidimensional poverty in Cambodia provides an analysis to better understand who is poor and what are the main driving factors of poverty (Andersen, 2019). In terms of GESI, it is important to consider the intersection between poverty/resource deprivation with the other “horizontal” factors causing discrimination, such as gender, ethnicity, age, health, sexual identity, disability, etc.

2.3. Ethnicity

Cambodia is a multi-ethnic country with the Khmer ethnic group making up about 90% of the approximately 16.5 million total population. Other ethnic groups include Cham, Vietnamese, Lao, and Chinese minorities. Cambodia also counts 24 different indigenous groups, speaking their own language and maintaining specific cultural, livelihood and social features, living in 15 provinces, with the highest populations in Ratanakiri, Mondulakiri, Kratie, Stung Treng, Kompong Thom and Preah Vihear provinces (AIPP & Bourdier, 2015). Indigenous groups constitute around 1.34% of the population, but there is no reliable statistical data on indigenous groups in Cambodia (CIPA-CIYA-AIPP, 2019). The situation of indigenous people in Cambodia is the object of concern, due to the progressive reduction of the natural resources that constitute their livelihoods, together with the lack or underdevelopment of education, health, communication, and mobility infrastructures, as well as a lack of opportunities for employment (IWGIA, 2020).

2.4. Age

The decrease in the overall fertility rate and the increasing life expectancy of the population is raising the proportion of the older/elderly population in Cambodia. This older population also has an increased incidence of morbidity, disability, the need for long-term care, increased cost of health care, and financial insecurity (Royal Government of Cambodia, 2017). Factors such as ethnicity, religion, health status, educational level, and economic status may increase vulnerability among older people as well. Older

women outnumber older men in Cambodia and are more vulnerable due to gender discrimination and greater risks of being poor, widowed, and neglected (ibid).

Youth between 15-29 years of age constitute nearly half of the working-age population in the country, however, a large number of youths still have low skills, due to education drop-out (OECD Development Centre, 2017). This forces young Cambodians to engage in low-skill, low-wage, and insecure jobs, depriving the country of one of its potential resources. Young women are more at risk of being confined to informal, insecure, and low-wage jobs. In rural areas, job opportunities are very limited, which is one of the determinants for migration within and outside of the country. In indigenous areas, this situation is particularly relevant, with few job opportunities and lower-than-average education outcomes. Disability and risk behaviors, such as drug and alcohol consumption, impact youth too.

2.5. Disability

The World Health Organization (WHO) and World Bank's World Report on Disability (2011) estimate that 15% of the world's population have a disability and 2.2% of them have very significant difficulties functioning. In Cambodia, the official number of persons living with disabilities is estimated much lower at 2% (see [here](#)). However, the Demographic and Health Survey (DHS) conducted in 2014 estimated that 10% of the Cambodian population has some form of disability (NIS, 2014). National policies on disability have been released periodically by the Royal Government of Cambodia, focusing on all areas of life, including health and education, employment and participation in political life, with an emphasis on reducing poverty, ending discrimination, and realising equal rights for disabled people (DAC, 2017). However, civil society organisations focusing on disability rights highlight the high number of people with disabilities living in poverty and the exclusions and barriers that people with disabilities continue to face in Cambodia (see [here](#)). Apart from other forms of exclusion, women with disabilities are more likely to suffer from gender-based violence, sexual violence, or other forms of physical and emotional abuse (Ministry of Women's Affairs Cambodia, 2014a).

2.6. Sexual identity

In Cambodia, the Law on Marriage and the Family (1989) prohibits the marriage of same-sex partners; however, there seems to be a certain degree of tolerance for same-sex couples. The Cambodian legislation does not specifically prohibit discrimination based on sexual orientation and gender identity, and there are no sanctions for those who violate the human rights of LGBT persons. LGBT persons often face "high levels of stigma, discrimination and exclusion in a variety of settings such as home, school, the workplace, health facilities, and public spaces" (see [here](#)). This contributes to LGBT vulnerability and isolation, which can severely impact well-being and livelihoods. This lack of recognition and protection of sexual minority rights deters LGBT individuals from fully enjoying the right to participate in the political, social, economic, cultural, and inclusive development of the Kingdom (Ministry of Women's Affairs Cambodia, 2014a).

2.7. Other vulnerabilities

Social exclusion can derive from social, economic, and cultural phenomena such as migration, either within the country or overseas, unemployment, or other emerging issues, such as substance abuse. The lack of data or references signals that these are areas that may emerge during research.

2.8. Evolution and changes

Historical perspectives on gender in Cambodia and in Southeast Asia have highlighted the role of women in pre-modern and modern times and the evolution of gender hierarchies and roles among different historical periods (Andaya, 2006; Jacobsen, 2008). In the past women in Southeast Asia and Cambodia enjoyed relative equality, so much so that this is considered as a distinguished regional pattern (Reid, 2015). Historical research provides important contextual information to understand Cambodia's, as well as South East Asian, multi-ethnicity and indigenous groups, too (Scott, 2009).

2.9. Materials for discussion and group exercises

Session 2 focuses on GESI in Cambodia. Below are a number of videos in the Khmer language related to gender and social exclusion that can be utilised for groups or plenary discussions.

About gender:

- [Gender equality](#): Brief animated video explaining gender inequality
- [Husband and wife](#): Video story on gender roles featuring a Cambodian couple
- [Violence Against Women](#): Video story on domestic violence in Cambodia, with urban, rural, young, and older women
- [Gender and girls education infographic](#): Brief animated video presenting key issues related to gender and education

About poverty and economic marginalisation

- [Girl in poverty](#): Brief video is about a girl whose parents migrate, and she is forced to work to help her grandmother and younger siblings
- [Life](#): Video documentary on the experiences of girls working in the entertainment sector

About indigenous people:

- [Indigenous Women in Cambodia](#): Video documentary on indigenous women in Ratanakiri, presenting stories related to women's participation in land management
- [Cambodia Indigenous Groups](#): Video documentary on indigenous people in Cambodia;

About sexual identity, HIV stigma:

- [LGTBI Cambodia](#): Video documentary on prejudices faced by a lesbian couple;
- [Love in the factories](#): Video documentary on LGBTI workers in Phnom Penh who choose to work in the factories to escape prejudices and marginalisation in rural areas;
- [Women living with HIV](#): Video documentary on women experiencing marginalisation after testing positive for HIV

About disability:

- [Disability, women, sport](#): Brief video documentary about a woman living with disabilities, her difficulties and exclusion, and her way to overcome them through sports

Suggested questions for discussion:

- Do norms and prejudices in Cambodia tend to attribute moral virtues to the rich and powerful and lack of these virtues among the poorest?
- Are the poorest despised or looked down by urban, wealthy, and educated people? With what kind of consequences?
- Do the mainstream ethnic identities express stereotypes and biases against non-Khmer ethnic groups?

- In which ways does Cambodian society express a high degree of uniformity? Who does society perceive as negative individuals or groups that do not adhere to the general model?
- How is living with a disability perceived in Cambodia in relation to cultural and religious beliefs?

A brief case study that contributes to reflection on social exclusion of ethnic groups:

Case study 1: Read this text and reflect on possible similarities with regard to attitudes about indigenous peoples in Cambodia.

“Country A (unspecified country in SEA) has a vast and underutilised forest resource, the primary function of which is to contribute to national development. Logging these abundant forests will provide needed foreign exchange, jobs for people, and wood for the nation and the world. These forests are virtually empty of people. Those few people who inhabit the forests are ignorant and primitive, and they are an embarrassment to the nation. This is shown by their animistic beliefs, communal ownership patterns, and most fundamentally by their practice of destructive slash-and-burn agriculture. Civilising these people – converting them to [mainstream religion] and persuading them to practice permanent, settled agriculture, like hardworking plain farmers – is essential both to improving forest people’s lot and integrating them into the modern state. Such changes will contribute to modernising the entire country.” (Modified from Colfer et al. Making Sense of Intersectionality, CIFOR, 2018)

Session 3: The role of research in GESI

“If we step out of the house, we become more aware, we become more vocal, we get more information, we gain more exposure, we get more respect . . .” Focus Group with Women on Community Forestry
(Agarwal, 2010, pp. 16)

Social research has an important role to play in GESI. It can make discrimination and exclusion visible with new data and analyses and provide recommendations or suggest adapted approaches. But more importantly, it can empower marginalised groups, offering them opportunities for engagement, visibility, and to gain agency (the ability to make effective choices and to transform those choices into desired outcomes through action).

However, **norms, stereotypes, prejudices, or stigma that prevent marginalised groups from fully participating in society may also prevent them from participating in research.**

“Representatives of marginalised groups are not usually those who initiate any research on themselves and marginalised people are not usually the ones who benefit from the research results.”
(Moree, 2018, p. 3)

Marginalised groups and individuals are seldom proactively included in research design, methodologies, and practices that do not focus specifically on them. They are not selected as informants, or the obstacles they face in terms of time availability, language, literacy, mobility, or social stigma are not considered. Also, methodologies may not allow them to overcome shyness, shame, or low self-esteem, or do not offer them enough protection.

Among the biases that may hamper their active participation in research activities, are:

Systemic factors: Community elites, authorities, policymakers, and informants may bear gender-related social, cultural, and ethnic prejudices toward marginalised groups and individuals (not accounted for in statistics; not considered as trustable informants);
Methodological factors: The research design itself bears pre-judgments or prejudices toward marginalised groups or individuals; researchers’ unconscious biases and lack of awareness of unequal power relations established between researchers and informants;
Other factors: Even if the research design and the researchers are taking into account gender and social exclusion, there may be a lack of facilitation and support to actively engage marginalised groups and individuals; resources allocated may not be sufficient in terms of time, support (translation for example), skills, etc.

3.1. Methodologies

Qualitative and quantitative methods are both scientifically legitimate and are not mutually exclusive; the table below provides some general features of these two approaches.

Qualitative methods	Quantitative methods
Explore and formulate the hypothesis	Test hypothesis
Subjective investigator perceptions are a component of the evidence	Emphasis on observer independence from the object of the research
Interaction focuses on the expression of feelings, motivation, meaning	Interaction focuses on frequencies of predetermined variables (questionnaires)
Flexibility and adaptation in data collection Use of participants' observations, interviews, conversations, etc.	The high degree of standardisation in data collection Use of structured data collection tools and predetermined categories
Small sample, in their natural context	In large samples, context may not be relevant
Bottom-up process	Top-down process
Inductive analysis	Deductive analysis

(sources: Flick, von Kardorff, & Steinke, 2004; Creswell, 2014)

There is a general acknowledgment that participatory qualitative methodologies “provide an in-depth understanding of the current extent, underlying/core reasons, barriers, and opportunities” experienced by marginalised groups and individuals (Smeru Research Institute, 2018). To identify norms, values, and prejudices that determine marginalisation and discrimination and understand their impact on groups and individuals, it is necessary to dig in depth into perspectives, motivations, or feelings. Qualitative methodologies are better suited to analyse the complex and dynamic context of differences driven by gender, ethnicity, class, status, sexual identity, etc. (Denzin & Lincoln, 2017, Preface). Quantitative research relies on a hypothesis that researchers will test by defining several variables and gathering their frequencies and their inter-relations. Qualitative research, on the other hand, is a process that moves ‘from the inside out,’ to examine the points of view of the people who participate (Flick et al., 2004, pp.3-6) and to analyse this information, which is gathered through interviews, discussions, and observations, to develop explanations.

Qualitative research is often seen as a “less scientific” method, and this point of view was also highlighted during the virtual sessions of this training. However, qualitative methodologies, which are diverse and aimed at supporting different types of social enquiries, undergo processes of validation and control just as rigorous as quantitative ones (Denzin & Lincoln, 2008).

Choosing a methodology relies on several factors. When investigating a field that is already known, in a familiar context, around issues that are at least partially explored, the methodology can be more pre-structured. But when new fields are investigated, where there is a lack of conceptual analysis and references, methods should be open and allow for more flexibility (see in Flick et al., 2004, Part 4).

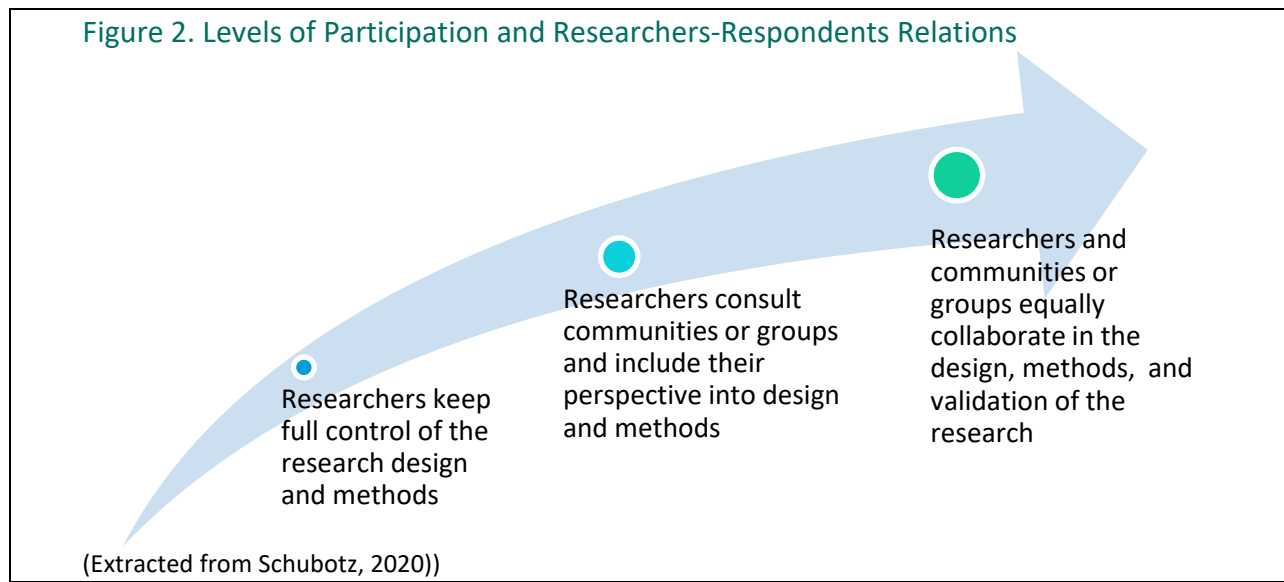
Methodologies can also include both qualitative and quantitative elements and this is often the case. Qualitative methods may then allow for a better understanding of key themes and issues, while quantitative methods can be used to quantify the frequencies of certain phenomena (Creswell, 2014).

3.2. Participation

Making research participatory means redefining the relationship between research professionals and participants. There are different levels of participation that can be developed through the research process. The research can be fully controlled by professional researchers, who design the methods, gather

the data, and analyse the results. The opposite occurs when participants exert full control over the research process. In between there are many other possibilities.

The idea of participatory research is to merge the perspective of the participants with the ones of the researchers: both sides are called to play an active role, understand each other, interact, and find common ground (Bergold & Thomas, 2012). A participatory approach entails a power redistribution between professional researchers and participants, moving away from the idea that expertise is only held by outsiders (researchers) and shifting to recognise participants' knowledge, skills, vision, and perspectives.



Genuine participatory research with communities is a complex process that requires time, resources, expertise, and capacity to deal with many different aspects that may develop and need to be solved. For these reasons, participatory research with communities or groups is often limited by time and budget constraints. However, even in less participatory research frameworks, it is possible to adopt collaborative and partnership-oriented methods that enhance participation. For example, you can plan for a participants' advisory group that will review the research design and the methods; involve participants in information gathering and results analysis; call participants to validate the results, etc.

3.3. Research with marginalised groups

Research with groups or individuals that are marginalised and socially excluded requires proper approaches, time, and the control of biases, pre-judgments, and power relations that arise from the relationship between researchers and participants. Researchers should be aware of and reflect on their position of power in relation to marginalised groups or individuals, and acknowledge their advantage in terms of social status, gender, or other aspects. Moreover, researchers, unless undertaking participatory and negotiated approaches to the research, hold decision-making power over the process- they design, plan, and implement the research (Moree, 2018). Negotiating the participation of marginalised groups and individuals is one of the ways to mitigate the unequal power relations between researchers and participants. GESI is about social change, and this cannot be achieved if the groups or individuals at stake are disempowered, not aware of the aim of the process in which they are involved, not able to voice their perspectives freely, or not able to exert their agency.

3.4. Ethical concerns

Groups that are marginalised by society may face not only barriers to their full participation but also risks for participating. Coming out publicly and talking about their concerns may exacerbate their marginalisation or put them in danger. There are well-known cases of women who after speaking out in community meetings about gender-based violence were confronted at home by enraged relatives or partners.

Research with a GESI approach, actively involving marginalised groups and individuals, should strengthen measures to ensure that participants will benefit from the research. More importantly, participants must be protected from the risks inherent to their participation in the research. These principles apply to all kinds of social research but are particularly crucial while working with marginalised groups. Some guidelines to consider:

- Participants must give their Free Prior Informed Consent to the research. This should be considered more as a process than a simple preemptive green light given to researchers. As such, it may be reviewed and re-discussed throughout the research and participants should have the right to withdraw their consent at any time.
- There should be clear benefits deriving from participation in the research; this is part of the informed consent and should be clearly spelled;
- Participants should be informed about the risks inherent to the research and given a full description of how these risks are going to be managed;
- Confidentiality and anonymity are aspects that should be discussed in depth with participants, and measures should be enacted to respect their recommendations and demands;
- Research staff must be trained in research ethics, people's rights, Free Prior Informed Consent practices, and have high standards of ethics and responsibility;
- Collaboration with community partners and organisations, shelters, assistance structures, or other specialised stakeholders should be set up to address specific concerns (violence against women or children, substance abuse, human trafficking, forced labor, human rights violations, etc.)
- Collaboration with local authorities and police may be necessary to ensure that participation in the research does not increase the risk of identification, arrest, or detention when working with particular groups (sex workers, drug users, etc.);
- Compensation for participation in research activities should be considered if working with the extremely poor or people who rely on daily income if the participation is time-consuming (community activities lasting multiple days, etc.); the kind, amount, and entitlement to compensation should be negotiated; compensation in kind is often a suitable approach;
- Responsibility and ethics in reporting the results.

3.5. Materials for discussion and group exercises

Session 3 focuses on research with marginalised and excluded groups. A number of case studies have been developed to discuss how to identify marginalised groups in a given context, in view of GESI research.

Case study 3.1: In a commune in province A, to provide water for irrigation to rice producers during the dry season, a dam was constructed with the support of external donors plus the Commune Development Fund. The dam supports 4 villages. To manage water resources, a Community Water Management Committee was set up, according to the law. After some years of activity, research is planned to evaluate villagers' access to water resources and understand if there have been forms of exclusion and why.

In the process of designing the research, two questions need to be answered:

- What groups in the community should be particularly investigated by the research?
- How do researchers get access to these groups, gather their perspectives, and minimise biases either due to the environment (informants, community members, etc.) or to the research design?

Case Study 3.2: According to the statistics gathered by local authorities, commune B shows a significant increase in dropout rates in the local primary schools. The trend is similar among the communities in the commune; primary schools are located in each community. Authorities would like to launch research study to assess if and how Gender Equality/Inequality and Social Inclusion/Exclusion contribute to drop out of girls and boys from school.

- What secondary data are needed to plan the research?
- Which informants/stakeholders should be consulted to gain information?
- What community groups or households should be particularly investigated?

Draft a tentative list of groups or households that need attention and explain why;
How should you proceed to research factors influencing dropout?

Case study 3.3: A community in province C is engaged in drafting its priorities for the annual Commune Development Plan. The community is located 15 km away from the provincial road, the market, and the Health Center. The community comprises around 250 families and the main livelihood activity is agriculture (rice and some vegetable production). A number of young men and women migrate out of the village, in some cases leaving children behind with grandparents. The very poor (ID Poor) make up around 14 per cent of the inhabitants. Preliminary discussions have highlighted a number of priorities: a water reservoir to store water during the dry season; a new irrigation channel for dry season rice producers; the provision of sanitation facilities for the school and the poorest households that cannot afford it; road repairs; pre-school childcare; and a school canteen structure for school feeding, with contribution from local food producers. The community is divided, with some groups advocating for investments in infrastructure (roads, irrigation channels) and other groups advocating for more social-oriented interventions, such as sanitation, preschool, and school feeding.

Research is launched to understand people's priorities and contribute to the design of a Gender Equality and Social Inclusion plan.

- What groups in the community should be particularly investigated by the research to ensure inclusivity?
- Which methodology would be the best option to gather information from these groups?

There are also some video resources about research with marginalised groups, participatory approaches, and ethics concerns, which can provoke further discussion:

- [Cultural competence and cultural humility](#): (English) Provides a reflection on power relations, researchers' awareness, and marginalised groups
- [Engaging marginalised groups](#): (English) Animated video on how to engage marginalised community groups or individuals in research
- [Community participatory research in river management in Stung Treng](#) (Khmer) A video documentary about participatory research conducted with a fishing community about their environment
- [Ethics in research](#): (English) A brief introduction to ethics in research

Session 4: GESI in Research Practices

A GESI research strategy implies that both gender equality and social inclusion are taken into consideration while designing, planning, and conducting the research. The following sub-sections provide information concerning mainstreaming GESI into some of these different steps. Without covering all aspects of research practice, these sub-sections provide some practical tips to guide you in designing and conducting GESI-sensitive research.

4.1. Theoretical framework and literature review

Once the general aim of the research has been decided, the conceptual framework for the development of the research questions and the study design are formulated from the exploration of the literature. This allows you to identify what is already known, what methods have been used to analyse the issue, any debates concerning the issue, gaps and the areas of research less explored, and the terminology in use.

Gender is now acknowledged as an essential element of social analyses and gender studies cover all sectors and disciplines. Therefore, there is significant literature exploring gender aspects in various fields, including agriculture (see FAO & World Bank, 2008; Razavi, 2009; Quisumbing, Agnes R. et al., 2014); natural resources management, forestry, and fishery (see Agarwal, 2010; Colfer & Minarchek, 2012; CIFT, 2012); and public policies, macroeconomics, and labour (Jain & Elson, 2011; Lansky, Ghosh, Meda, & Rani, 2017), among many others. Research is also evolving in sectors such as gender and ethnicity, caste, class, disability, sexual identity, and other social categories. Many of these studies look at specific sectors, geographic areas, or social contexts.

If ethnicity constitutes a significant element in the research, it is fundamental to gather information to understand the livelihoods, social organisation, culture and beliefs, and the gender roles within the ethnic groups at stake. For example, in the case of indigenous groups in Cambodia, research cannot ignore their agricultural systems and way of dealing with natural resources, their customary laws and social organisation, their cultural beliefs, and the gender roles within their societies (see Park & Maffii, 2017). This knowledge helps to get rid of pre-judgments and stereotypes that result from unawareness.

4.2. Resources availability

Suitable methodologies for GESI research have been discussed in the previous session. It is worth mentioning again that qualitative methodologies offer more opportunities to investigate gender discrimination and social exclusion starting from individual and/or community perspectives. However, researchers should consider the resources available to them in terms of expertise, time, and budget.

Limited time frames and funding do not allow researchers to engage in extensive fieldwork and participatory methodologies that require community involvement and multiple interactions. Another important factor is expertise- a GESI research team should include at least one gender expert. This is because gender analysis cannot be improvised; there are specific theoretical requirements that need to be worked out and translated into methodological tools and practices. Besides gender, experience in conducting research with particular methods, such as qualitative and participatory methodologies, is also a prerequisite. If GESI research is oriented toward specific fields (disability-related exclusion, ethnicity, etc.), there is also a need for expertise in conducting these kinds of social enquiries.

4.3. Secondary data relevant to GESI

Secondary data should take into consideration GESI-related categories. Therefore, it is important to gather:

Sex disaggregated data at the local level concerning: the population, poverty indexes (ID poor), household composition, age, ethnicity, livelihood, access to resources (land tenure), employment, access to markets, migration, education and literacy, health (HIV prevalence, TB, disabilities, etc.), nutrition, transport, mobility, communication, reproductive health (access to contraception, pre-natal care, maternal mortality, etc.), prevalence of domestic violence and gender-based violence. Often there are no available data sources documenting other marginalised groups, such as LGTBI, sex workers, informal workers such as beggars, scavengers, people in debt, people using substances, or other groups that face extreme marginalisation and social stigma.

Sex-disaggregated data at the national level are often not available, and this is a problem. In some cases data are available at a lower level- many officers in the public administration do great work in collecting data, often with scarce means and little access to technology (handwritten statistics, paper, or blackboards...).

The legal framework: important to frame gender discrimination and social exclusion in the larger legal context by exploring: comprehensive of constitutional rights and national laws and ratification of international instruments (CEDAW, Convention on Economic, Social and Cultural Rights, Racial Discrimination, IP rights, Labor Rights, etc.).

Sector National Policies developed to deal with particular social issues (Gender Policy or Strategies; National Policies targeting poverty, social security, ageing or youth population, people with disabilities, people living with HIV, Indigenous Groups, etc.)

Available data on trends and changes: for example, outmigration or immigration, changes in access to land and natural resources, new activities and sources of livelihood, etc.

4.4. Pre-identification of marginalised groups

As mentioned before, not all marginalised groups can be identified in advance, as some groups or individuals will only emerge during the research process. However secondary data serves as an orientation and may provide a general perspective (the percentage of ID poor, migrants, women heads of households, ethnic groups, landless, etc.):

- Information about marginalised groups can be gathered from local informants, like community authorities, group leaders, stakeholders, civil society organisations (CSOs), etc. However, informants often are not neutral- local authorities, stakeholders, or CSOs may overestimate some groups or underestimate other groups. Informant-related biases can be overcome by relying on multiple sources, especially if they represent different interests (governmental and non-governmental; indigenous and non-indigenous CSOs or groups; immigrants and local groups; etc.).
- Specific information on gender inequality, discrimination or gender-based violence is usually better provided by organisations working in this sector or authorities with a specific gender mandate, such as the Ministry of Women’s Affairs departments, Women and Children Commune Committees, etc.

- Some groups or individuals can only be identified while in the field, through direct observation, or with the help of informants. Direct observation at the community level is a meaningful methodology; it allows for understanding spatial exclusions (distance from road, services, etc.), gaining first-hand understanding of socio-economic differences (houses, number of animals, access to water, electricity and toilets, distance from services etc.), and differences between groups (migrants, ethnic minorities, etc.).

4.5. Planning the data collection process

Qualitative research methodologies adopt very diverse methods to gather information. GESI research aimed at understanding the reasons, barriers, norms and other factors contributing to gender inequality and social exclusion, will rely on in-depth or semi-structured interviews, focus group discussions (FGDs), community participatory activities, collection of stories, case studies, etc. All these activities should be gender-specific so that women and men have a safe space to contribute, including those involving marginalised groups. Therefore, it is mandatory to gather information from separate groups of women and men throughout the research process. The main steps for data collection planning involve:

- Draft a list of key informants/stakeholders selected for individual interviews;
- Draft a list of groups of women and men to be included in FGDs; and specific criteria to be included such as women head of households, different age groups, different ethnic groups, levels of poverty, etc.;
- Plan for interviews with marginalised individuals that cannot be gathered through FGDs (people living with HIV, people living with disabilities, LGBTI, victims of VAW, etc.);
- Plan for community activities (participatory rural appraisal (PRA), mapping, presentation of results and validation meetings with mixed groups of women and men).

Please note that household interviews that do not distinguish between women and men, elderly and youths, cannot catch gender equality issues or other forms of exclusion.

4.6. Designing the research tools

GESI research is grounded in gender analysis and relies on analysis frameworks. Gender analysis methodologies look at:

- **Gender roles and division of labour:** who does what, either in the productive sphere (employment, jobs, productive activities) or in the reproductive sphere (care work, house chores, cooking, etc.);
- **Access, control, and ownership of resources:** who has what, either tangible resources such as land, tools, inputs, capital, etc., or time, education, networking, and socialising;
- **Decision-making power:** who makes decisions and about what, either in the family or at community or other levels;
- **The norms, values, and beliefs that shape these aspects and their changes over time.**

In GESI, these aspects are analysed not only among women, men, boys and girls but also among the different subgroups that are relevant in a given context: the poorest, ethnic minorities, older people, youth, people living with disabilities, etc.

Below is a general example of a Gender Analysis Checklist that can be adapted to different contexts and groups.

Gender Analysis Checklist

<p>Division of labor</p> <p>Productive work</p> <ul style="list-style-type: none"> • What are the main livelihood activities? • Are both women and men active in the sector? • What is the work carried out by women and men? • Are there tasks shared between men, and women, or carried out only by one group? • Are men or women culturally excluded from any tasks and why (norms, etc.)? • Are these roles flexible in case of hardship or emergencies? • Do men or women take over from each other if activities become more profitable? • Have there been changes in the gender division of labour? Why? • What are the key skills, expertise, and knowledge of women and men? <p>Reproductive work</p> <ul style="list-style-type: none"> • Who carries out the domestic tasks (caring for household members, caring for the children, caring for older relatives/inhabitants, food production, shopping, food preparation and cooking, fuel and water collection, education, health care, laundry and cleaning, house maintenance, etc.)? • Are these roles flexible in case of hardship? • How much time do these activities take? • Have there been changes in these activities making them easier or more difficult/intensive? <p>Community Work</p> <ul style="list-style-type: none"> • Do women and men carry out work for the local community (care and maintenance of community facilities such as water supply equipment, meeting places, and places of worship)? • How much time does this work take and when is it done? • Are these roles flexible? • Have there been changes in these activities?
<p>Access, control, and ownership of resources</p> <ul style="list-style-type: none"> • To what extent do women and men own or have access to and control over land, capital, equipment, credit, education, markets, time, networks, communication, etc.? Why? • What are the constraints and implications arising out of a lack of control over or access to productive resources? • How do men and women differ in the constraints they face, and how do these differences affect their work, productivity, and access to benefits? • Do women and men get equal access to income, benefits, incentives, wages, etc.? If not, why? • Do women and men have equal access to health care, water and sanitation, training and education, vocational training and adult education, etc.? If not, why? • Do women and men derive status and respect from their activities and why? • Which cultural norms constrain women's access to, control over, and ownership of resources (consider cultural exclusion from productive activities, participation in reproductive activities and time poverty, lack of mobility, exclusion from public activities, legal provisions, etc.)? • Have there been changes in terms of women's and men's access, ownership and control of resources? Why?

Decision-making power

- How do women and men make decisions within households?
- Do decision-making processes within the household contribute to gender inequality? How?
- Have there been changes in decision-making power within the household? Why?
- What types of collective organisations (traditional socio-cultural organisations, producer groups such as cooperatives, savings and credit groups, community-based organisations, NGOs, unions, etc.) exist in the sector at stake?
- What is the membership profile of these community organisations? Do women and men or other groups have equal access to membership? If not, why?
- Are women and men equally represented (numerically) in these organisations? If not, why?
- Are other groups equally represented (numerically) in these organisations? If not, why?
- What are the obstacles that women, men, and other groups face to attend community organisation activities, meetings, etc.? Why?
- Are women, men, and other groups equally informed about community activities? If not, why?
- Do women, men, and other groups have equal access to management roles within these organisations? If not, why?
- Are women, men, and other groups equally active in setting the agendas, making proposals, selecting priorities, organising activities, and making decisions about using funds or investments?
- Are there women's organisations in the community? Which ones?
- Are there organisations gathering particular groups (elders, disabled, minorities, etc.)?
- Are there women leaders in the community? Are members of other groups leaders?
- Have there been changes in the participation of women, men, and other groups in collective structures? What are the consequences of changes?

Recommendations

- How can positive changes be made?
- What is needed to improve the situation of women, men, etc.?
- Have women and/or men taken steps to change this situation? How?
- What else needs to be done?
- What kind of external support should be made available?

4.7. Data collection process

It is seldom possible to gather answers to all these questions during a FGD or an interview. Researchers should use the checklist strategically, not literally. What is essential is not to complete the list but rather to identify the key issues.

- Gender analysis checklists should be assembled starting from the specific sector that the research is investigating. Researchers should have expertise in the particular field of research to draft questions that are pertinent and adapted. For example, research in agriculture will consider all farming tasks in the division of labour, and specific assets to evaluate access to resources; research in access to health services will give more focus to decision-making, mobility etc.
- Asking “Why?” will contribute to understanding the norms that shape the division of labour, access to resources, decision-making power, and participation.

Negotiating suitable times and locations for discussions and interviews is a must in GESI research:

- Take into consideration women’s limited free time, as well as other constraints (cooking, child care, etc.). Sometimes it may be necessary to organise childcare during meetings with women to allow them to participate;
- Consider the needs of older people and people with limited mobility;
- Make sure that women and subgroups feel empowered to speak (consider confidentiality, pressure from powerful people, or even husbands, especially while selecting a location);
- Organise separate groups for the poorest, elderly, youth, landless, different ethnicities, etc.;
- For people living with disabilities, people living with HIV, and victims of violence, conduct individual interviews and ensure protection and confidentiality (snowball sampling method: ask the first interviewee if they know other people facing similar problems who would accept to be interviewed and proceed in this way);
- Consider compensation when working with the poorest or marginalised groups or people. Compensation can allow people who rely on a daily income to participate in research activities (labourers, beggars, etc.); or consider in-kind compensation (food, lunch, other useful items).

4.8. Interviews and discussions process

Conducting interviews and FGDs is an art- it requires skills and expertise. Both interviews and group discussions need to be planned by gathering background information, deciding how to start, selecting the most engaging questions, and creating a list of questions. Open-ended and semi-structured interviews, as well as group discussions, should not be conducted by simply following the list of questions, which is more a reminder than a step-by-step guide. In qualitative research, interviews and discussions resemble more of a conversation than a question/answer session. Here are some tips and suggestions that are useful to remember:

<ul style="list-style-type: none"> • The first contact and the introduction are fundamental and can influence the whole process. Use simple and clear language, without technical or sophisticated words. If not negotiated in advance, proceed with Free Prior Informed Consent and allow enough time for explanations, questions, and feedback;
<ul style="list-style-type: none"> • Prepare some general opening questions: “How about the harvest? What about people’s health? Etc.” Not only can these questions help break the ice, but they also let people understand that researchers are there to listen to them, not just to extract selected information from them!
<ul style="list-style-type: none"> • Accept participants’ deviation from pre-determined questions. The aim is not to complete your list of questions, but to get people’s feedback and understand their problems! Rushing from one question to the other following the list alienates participation and interaction;
<ul style="list-style-type: none"> • Observation of the group dynamic is part of the data collection; divergences may appear within groups and may require very subtle facilitation skills to clarify issues. Sometimes it is useful to proceed with individual interviews to gain a better understanding;
<ul style="list-style-type: none"> • Use examples and comparisons to solicit discussion (“in a village, household, group... nearby they told us...”);
<ul style="list-style-type: none"> • Questions about “what has changed in ...” allow participants to show their perspective and are very useful at the beginning;
<ul style="list-style-type: none"> • Ask if life is easier or more complicated (too much work, less resources, less access, more barriers) and why;

<ul style="list-style-type: none"> • Adopt a discovery mindset, not a validation one. Remember that they are the experts of their own situation. Be humble and open to learning from participants;
<ul style="list-style-type: none"> • Consider that often women and marginalised people may have interiorised biases and prejudices, lack self-esteem, and do not value what they do and what they know;
<ul style="list-style-type: none"> • Encourage participants and prize their skills, knowledge, and observations;
<ul style="list-style-type: none"> • Show empathy! Participants may have endured negative, hurtful experiences that are difficult to remember and explain;
<ul style="list-style-type: none"> • Celebrate their accomplishments and resilience: “You have been very brave to overcome this... How do you manage to keep going despite that?);
<ul style="list-style-type: none"> • Gather recommendations and perspectives on possible positive changes;
<ul style="list-style-type: none"> • Do not end the discussion with sad and troubling issues; prepare some easy, light questions for the end and do not leave the groups or the individual sad or depressed;
<ul style="list-style-type: none"> • Do not keep participants at the meeting after the negotiated time. If the researchers feel that the results are not sufficient, negotiate another meeting or individual interviews.

4.9. About Translation

If you work with ethnic minorities, you need to conduct interviews and discussions in their own language!

- Indigenous languages are not written, but indigenous people know very well their own language, and can often speak more than one indigenous language. Do not judge them on their literacy!
- Do not trust what informants may say about minorities’ proficiency in mainstream languages. Often women or elders do not speak it fluently;
- Recruit more than one translator and test them. Do not hesitate to change translators if needed; your results often depend on the translation quality;
- Explain very well to the translators the aim of the research and the need to understand in depth what people say without cutting them or summarising their speeches;
- Check for translators’ biases (educated translators may have prejudices against traditional lifestyles, male translators may not fully understand or value women’s perspectives and knowledge, etc.);

4.10. About recording interviews and FGD

The recording provides some advantages and disadvantages:

- Has to be negotiated with participants and may make participants uncomfortable;
- Allows recording word-by-word of what people say;
- Transcribing recordings is a very time-consuming task;
- Recorded transcriptions may increase quality standards;
- Researchers may trust the recorder too much. This is a risk because in the field many factors can go wrong: the team may not record the sound correctly; during the discussion, the team may forget to check if the recorder is working; in many cases, noise around the meeting place (children playing, dogs barking, chickens, machines such as mills, pumps, etc.) interferes with the recording; batteries may be low, etc.

Recording complements but does not replace note-taking. It is always safer to take notes to avoid the risk of low-quality recordings.

4.11. How many?

In quantitative research, the sample size is predetermined. In qualitative research, the number of FDGs or interviews depends on the design but can be flexible. An issue may come out that deserves further enquiry or an interview may open a new scenario that needs more information.

The principle criteria for data collection in qualitative analysis is **saturation**. The concept of saturation is still debated (Saunders et al., 2018) but it can be summarised as follows:

“When new data no longer delivers new knowledge, then theoretical saturation has been reached” (Flick et al., 2004, pp. 182-3).

This means that at a certain point, the information gathered is similar and repetitive and no new themes or issues emerge from FDGs or interviews.

4.12. Validating results

In individual interviews, or collective discussions and activities, there is a need to validate what the researchers have understood and noted. This can be done after each question, or even better by summarising the results at the end of the interview or the discussion and asking the participants if what has been noted is correct. The process of validation may provide further details that were missing, allowing people to rectify and clarify issues, and adding quality to the information collected.

When conducting research with communities, it is a good practice to organise meetings where the different groups involved will present their findings. It is an important process that can generate awareness and change. Often it is the first opportunity for marginalised groups, women, poor groups, ethnic minorities, etc., to come out and share their concerns, and it represents an important change factor for them as well as for the audience.

This activity should be negotiated in advance with each group. Researchers should explain the process and gain consent from participants. It is useful to offer support to the group representatives selected to present the results on how to organise their speech (not on the content!). It is also surprising to see how people who do not take notes can easily remember all the questions and the answers to a discussion.

4.13. Materials for discussion and group exercises

Session 4 focuses on GESI approaches to research design, methodologies, data collection processes, etc. A comprehensive exercise has been developed to practice the different aspects discussed. The exercise consists of a scenario and two related case studies with several questions that need to be answered.

Scenario for GESI Case Studies Exercise

The global COVID-19 pandemic is having a deep impact on Cambodian people and communities, including:

- There have been drops in formal and informal employment in industries and services, such as the textile sector, tourism and hospitality, construction or petty commerce, and this may leave workers jobless without clear opportunities for employment;
- Small and medium enterprises will see their business reduced, affecting the livelihood and food security of different social groups, especially the most vulnerable;

- The crisis impacting neighbouring countries is leaving thousands of migrants without jobs and depriving their families of remittances, a crucial resource that subsidises rural households.

The crisis will affect all of Cambodia's population, but women will be disproportionately affected. Women operate the majority of small informal commercial enterprises and are overrepresented in low-paid, less secure informal jobs. In rural areas, women heads of households (between 20 and 24% of all households), as well as landless women, elderly caretakers left in charge of migrants' children, and women in debt are also particularly at risk. Women and girls, in times of crisis, bear the responsibility to cope with food insecurity. Their workload increases or forces them to engage in insecure activities, losing opportunities for education and better jobs. Of course, men are affected by the crisis too, as well as many marginalised groups in both urban and rural areas (indigenous communities, ethnic minority groups, women and men in insecure jobs, aging population, people living with disabilities or chronically sick, etc.). Crises may also constitute an opportunity for envisioning new and more sustainable development models, more equitable in terms of distribution of resources, more gender equal and socially inclusive. A pool of Development Agencies is working with the Cambodian Government to identify measures and support needed to cope with the crisis. With this aim they are planning a series of research to identify the needs of the most vulnerable, adopting a GESI framework to ensure equality and inclusivity and leave no one behind.

Case study 4.1: Support to primary school access and retention in rural areas

The case study will focus on a commune located in a rice-producing area. The communities' social composition reflects the median national range in terms of income, resources, and incidence of poverty. However, the COVID-19 pandemic has worsened the livelihood of many households, including young people whose employment in urban areas has fallen; decreased remittances from migrants; and decreases in agricultural incomes. The authorities are launching a study to assess how the crisis may affect student dropout at the primary school level. The study's GESI approach should ensure that gender equality and social inclusion are mainstreamed across the assessment to understand the factors that may disproportionately affect women and marginalised groups, and their children, impairing their access to education services.

Case study 4.2: Improving access to basic services in poor urban areas

The study will focus on the outskirts areas of Phnom Penh, inhabited by formal and informal workers, small sellers, urban transport drivers, and other low-income households, particularly at risk in times of crisis. The areas are characterised by scarce basic services (water, sanitation, access roads, and rubbish collection) which increase people's living costs. The aim of the study is to identify the needs and priorities of the groups living in these areas in order to draft a plan for the provision of basic services, such as drinking water, toilets, electricity, rubbish collection, and to ameliorate their living conditions. A GESI approach should ensure that gender equality and social inclusion are mainstreamed across the assessment to understand the factors that may disproportionately affect women and marginalised groups, impairing their equal access to services and participation in decision-making.

Questions:

- What secondary data are needed to plan for the research and which informants/stakeholders should be consulted?
- What community groups or households should be particularly investigated? Draft a tentative list of groups or households that need attention and explain why.
- How should information be gathered from these groups or households? Draft a tentative data-gathering methodology.
- What kind of key information needs to be gathered from these groups and households? Draft a tentative list of questions for FGDs, individual interviews, or other data collection methods.

Instructions:

- Select the case study.
- Feel free to modify the case study scenario according to your experience or expertise, without changing the GESI perspective. If changes are made, justify and explain the changes.
- Summarise the results in no more than 4 slides.
- Feel free to add additional data, information, ideas, and recommendations.

There are a number of significant videos available on the internet that can help to gain knowledge and skills in relation to qualitative research methodologies. Here is an example:

- [Fundamentals of Qualitative Research](#) (English) First of six modules (all available online) presented by Dr. Leslie Curry, Yale University;

The following two videos touch on interviewing techniques and provide important practical guidance on how to avoid mistakes while conducting interviews:

- [Interview with mistakes](#) (English)
- [The same interview without mistakes](#) (English)

Session 5: Data analysis and reporting

5.1. Taking notes

Ideally, a qualitative research team should include a researcher asking questions, possibly two of them for larger groups or communities, and a note taker. The note taker has the responsibility of recording the activities, the questions asked and the participants' answers, comments, and interactions. Taking good, comprehensive notes is the key to successful fieldwork. Taking notes can be exhausting so plan for more than one note-taker to share the task.

There should be one separate set of notes for each meeting, discussion, or interview. As soon as the fieldwork proceeds, there will be a lot of notes and a lot of confusion! Code the notes with information such as the note taker's name, the time, date and location of the meeting/discussion, the purpose, the number of participants, their sex, age, etc.

After each meeting or interview, the researchers should review the notes to add details in addition to what the note taker recorded, to correct issues, and to see if further clarifications are needed.

It is a good practice for the team to debrief and review the notes at the end of each day. This allows the team to compare results, to find new questions that should be asked, and to share opinions and thoughts. If this work is done daily, the work of transcribing the notes at the end of the fieldwork is made easier. As the research proceeds, notes accumulate and without regular debriefing a lot of the details and issues get lost.

5.2. Analysing information

Analysing qualitative research is a complex task and there are no mandatory and standardised methods. This is also because there are many qualitative methods. Though it was not possible to discuss in-depth qualitative methodologies in this short GESI training, there is a vast literature available and some of the cited sources provide good summaries (Flick et al., 2004; Denzin & Lincoln, 2008; Denzin & Lincoln, 2017).

The steps suggested here are indicative and are aimed at providing some practical input on how to approach one of the most complex phases of qualitative research.

On Processing Notes

- Transcribing notes is the first step of the analysis. Then team members should read the notes many times; intensive reading of the notes is mandatory in qualitative research.
- Each team member should start to identify and underline issues that are relevant: a concept, a problem, or a dynamic, which will constitute the main **themes**. From a **theme** may come different variants, or **sub-themes**: people may identify similar problems but react differently; the same issues may have different impacts.
- Team members should together review the themes and sub-themes they have identified, looking for consistency, harmonising them, and reaching an agreement on the principal themes and sub-themes.

- At that point themes and sub-themes can be **coded**; a code is a word or a short sentence that summarises a concept.
- Notes should be reviewed again to validate the codes: often some codes need to be aggregated, some divided, or new codes need to be defined, etc.

After this process, it is possible to draft a logical sequence of the codes which will constitute the backbone of the results analysis. It is a process similar to the drafting of a table of contents with main chapters, subchapters, etc.

- Expect to change this initial logical sequence during the analysis. It is often difficult to place all the codes in the sequence, as there may be exceptions, isolated issues that appear in only a few interviews, contradictory issues, etc.;
- Brainstorm and discuss with the team until it is possible to draft a chart, or a map, that includes all the codes.

During the analysis, select:

- Individual quotes that explain the codes- quotes are an integral part of the narrative;
- Stories gathered through individual interviews can be selected for specific case studies.

Qualitative data should be analysed for their meaning. Don't try to calculate percentages or frequencies. The result of the analysis is a narrative report, not a table of frequencies.

5.3. About Qualitative Data Analysis Software

There are now a number of different software providing qualitative data analyses. The choice to use such tools is individual- there is no proof that software can provide better or worse analysis. Here is a summary of the pros and cons (Winsome & Johnson, 2000):

- **Advantages:** reduce manual tasks; save time, especially while dealing with large sets of data; improve data validity;
- **Concerns:** time spent in learning to use the package; rigid processes; risk of losing depth and meaning; risk of distracting researchers from the work of analysis.

In summary, computer packages can simplify the tasks of researchers, but that does not mean that simplification adds depth and meaning to qualitative research.

5.4. Reporting

Qualitative research is a complex methodology and this should be remembered when formulating the research questions and scope: the wider the research focus, the more work it will take to analyse results and write the report! **Be humble and avoid an overambitious scope.**

Plan enough time for reporting. Even experienced writers need a lot of time to report qualitative research.

How do you start reporting? In order to formulate the research questions and select a methodology, researchers have already analysed the literature related to the subject and this part of the report should be already drafted. However, results may show that other sources need to be analysed and added to the initial literature analysis.

Start with the methodology: writing what has been done in detail helps the team to remember the process, concentrate on the research focus, and organise the content. It is also an easier section of the report to start with, including more descriptions which helps to train researchers in writing.

Proceed with the findings: besides the codes sequence, the GESI main areas of enquiry can help to organise the findings:

- Roles, work, division of labor, and its consequences; main codes and sub-codes;
- Access to resources and its consequences; main codes and sub-codes;
- Decision-making, participation and agency, and its consequences; main codes and sub-codes;
- How do norms influence these aspects? What changes or trends have been identified and what is their impact? Main codes and sub-codes;
- People's expectations and recommendations: main codes and sub-codes.

Draft a narrative of the initial findings, then proceed to review it for consistency and eliminate repetitions or redundancy. Be practical and ready to cut parts out often the first draft tends to grow bigger and bigger, but length is not synonymous with clarity.

Results should be presented in a plain and non-judgmental way. Researchers' perspectives can be presented in the discussion and conclusion chapters. Here is where interpretation can be offered; it is your research, and you are entitled to provide your opinion.

The discussion and conclusion should not introduce new results but rather discuss and interpret what has been reported in the findings. Compare results with other research findings, underline similarities, and explain differences. Acknowledge that results are limited and suggest areas for further investigation.

5.5. Recommendations

GESI research recommendations should focus on how to improve/achieve Gender Equality and Social Inclusion, and overcoming barriers and gaps.

Provide recommendations and be specific about:

- Stakeholders: who should do what;
- Time frame: what needs to be done in the short, medium, or long term;
- Implementation: not just what needs to be done, but also how, with what resources, support, participation, etc.

5.6. References

Carefully cite all the studies, reviews, research, or statistics that contributed to the research. Quote entire sentences or text if this adds clarity.

Accuracy in referencing is a must: there is now software that helps to include citations in the text and organise a references list ([Mendeley](#) is one example, but there are others).

5.7. Proofreading

Proofreading of the final report helps to strengthen the report and ease anxiety concerning writing skills; even native English writers have their texts proofread. Add resources for proofreading to your research budget. Get the text to proofread if you plan to submit it to peer reviewers, otherwise, they will simply focus on correcting your writing.

5.8. Peer review

Even if you are not formally submitting your paper to a journal, it is useful to get your studies read by colleagues or experts. However, peer reviewers should have competencies in the research field. Comments and inputs from experts who do not have specific expertise may be frustrating or not useful.

Good peer reviewers are polite, helpful, and will provide suggestions that will help to strengthen your report. They avoid criticism and are constructive and supportive. Accept their inputs and suggestions even if it entails more work.

5.9. Acknowledgments and credits

Remember to acknowledge all the people who contribute to the research, including the research participants. Acknowledge peer reviewers and proofreaders and whoever else contributed to the research. Credit all pictures appearing in the report.

5.10. Materials for discussions and group exercises

Session 5 focuses on data analysis. Below is an exercise on data coding that was presented during the session:

Case study 5.1: Research on Gender relations in the garment factories
Focus Group Discussion with Garment workers in Phnom Penh, Dangkor
Participants: 6 women (2 unionists) and 1 man; all workers, sewers, cutters
Location: Workers' compound, rented room
Duration: +- 1 hour in the evening
Note taker: Xxxxxx

Relations between women and men within the factory

A: [Woman] I'm a female union leader and other male union leaders mock me. They say that women are scared. The male unionist says that he is the union leader so he does not need to work like a normal worker; while I, even if I'm a female union leader, I work as a normal worker because I think that I should try my best to produce the same amount and quality of products as the normal workers. It does not mean that I'm afraid of the owner, but I do what I can do. As a unionist, you are always harassed, especially by the guards.

B: [Woman] I'm a unionist too, and today a supervisor threw clothes on the floor and told a woman worker wants her to pick them up. He wants the workers to work too fast. He is very bad and causes a lot of grievances among workers and today I discussed this with the factory admin because I'm trying to stop him. We have been successful in other cases with these kinds of bad bosses to stop them or have them apologise to the workers. Even if the company does not want these bosses, they create a lot of problems. We have other unions here, but they are affiliated with the employer, so the unionists have a lot of free time, and can go everywhere; while for me it is

different, every time I must take care of these problems and at the end my salary is the lowest in the factory! These unions' leaders are men and act like gangsters and mock and threaten me, but I do not care and I'm not afraid.

C: [Woman, pregnant] I'm a worker in the cutters group, and when the male worker who brings in the fabric arrives, he always chooses the biggest and heaviest pieces for me to cut. And if I complain about my pregnancy, he says: "If you cannot work, stop and stay at home!" He is the husband of a group leader. Factory men have a lot of free time. Men normally are [sewing machines] mechanists and they do not have so much work to do- the machines do not break down every day. When they have free time, they go freely around in the factory, chatting and flirting with the women. When I walk to the toilet, everyone looks at me with very strange glances, even the group leader. The group leader prefers not to have pregnant women. To be pregnant is not easy. Pregnant women feel sick, feel strange and tired, and it is very difficult. We get tired easily, vomit, and need to pee often. Group leaders, even when they are female, mock pregnant women by saying: "Those who cannot work, please stay at home, no need to come to work." They say that pregnant women are slow, late, sick a lot, and take a lot of leave.

D: [Woman] In my factory, men are less than 10% and they are in charge of machine maintenance. But sometimes they just sit freely and do nothing the whole day. If women workers finish their jobs, they are sent to help in another sector; we never have free time at all. If we finish our work sewing, we are asked to help fold clothes with other groups. But the men can sit and wait until a machine has problems. They receive more pay than us and a fixed amount higher than us. If we discuss equality in pay, they say that we cannot compare the salaries of men and women because we are working in different sectors. There are other men recruited temporarily, only for one or two weeks, to charge or discharge containers or similar tasks. For men it is more difficult to be recruited; the factory managers are afraid of them because men complain a lot. Even if women have no skills, the factory selects and trains them, and if they lack skills in sewing, they are sent to another sector. But if men have no skills or certificates, they do not select them.

E: [Woman] There are cases of sexual harassment. Especially if women workers wear sexy clothes; then we have this kind of problem, sexual harassment in the factory. Male workers, technicians and even guards harass them, try to touch them or say bad words or jokes. The factory made the rule that those who wear sexy clothes have to stand in front of all the others who look at them. It was shaming. But then we talked with the union about that, and the rule was dismissed.

F: [Man] I have been dismissed from my previous factory because I helped women workers carry heavy cotton when in a hurry. To tell you the truth, in the factory, they do not care about women or men, and they hurry women to carry even very heavy things. We have a woman unionist, and other union members (men) harass her. They say that she is not strong. Some bully her by saying, "Being female, long hair, short ideas, and pee cannot go beyond the heel". Sorry for saying that! But I trust her; she is brave, and she stands up for us. In the new factory, I worked overtime for more than 6 months, including Sundays; I felt very tired and sick. She sat with me and other workers at lunch time and then she spoke with the administration about it. She is not afraid to speak out.

Instructions:

- Try to identify as many main themes and sub-themes as you can;
- Give the themes and sub-themes a code;
- Highlight the issues or concepts that need clarification;
- Highlight the crosscutting issues;
- Based on the codes and the analysis, try to identify questions for further FGDs or interviews.

There are many online resources on qualitative data analysis. Here are the links to a series of lessons on qualitative research data analysis, given by Prof. Graham R. Gibbs, that are extremely informative:

- [Doing a transcription for qualitative research \(English\)](#)
- [On coding notes \(English\)](#)
- Coding notes 2 (English)

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