

**Gender Mainstreaming  
in Practice:  
A HANDBOOK**



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## FOREWORD

It is with great pleasure that we publish the second edition of *Gender Mainstreaming in Practice: A Handbook*.

Much has changed in the countries of Central and Eastern Europe and the CIS since the *Handbook* was first published in 2002. Several countries joined the European Union, and others anticipate their accession in the coming years. Many have adopted and begun implementing gender mainstreaming policies. Laws continue to be amended to better respond to the costs of gender inequality.

Despite this, baseline indicators of equality between men and women in these countries have for the most part remained unchanged. While anecdotal evidence suggests that awareness of gender issues has increased among decision-makers and (to a lesser extent, perhaps) the general public, this awareness needs to be more fully translated into concrete improvements in the lives of women and men. New challenges constantly arise: dramatic increases in HIV prevalence in parts of the region, natural disasters in others, widening gaps between the rich and the poor in many countries, continued trafficking in humans and narcotics, and other threats to human security. Although women and men are affected differently by these challenges, women bear the brunt of many of them. Gender mainstreaming is as relevant as ever.

We are therefore publishing this revised and updated edition of the *Handbook*, in hopes that it will continue to help policy-makers and others in the region address these and other policy issues from a gender perspective.

I would like to thank all those individuals who were instrumental in the creation of the first and second editions of the *Handbook*: Shahrbanou Tadjbakhsh, who originally saw the need to create this tool many years ago; Astrida Neimanis, Miroslava Stricova, Zuzana Hlavacova and Galina Kalinaeva for their efforts in writing, commenting on, editing and publishing the first edition, and Dono Abdurazakova, for her ongoing dedication to promoting gender equality in the region. I would also like to thank all gender focal points (past and present) in UNDP country offices, as well as the many participants in training seminars on gender mainstreaming, whose insightful comments and suggestions have allowed us to improve upon the *Handbook* in the second edition.

Ben Slay, Director  
UNDP Regional Centre  
Bratislava

## PREFACE TO THE SECOND EDITION

Five years ago, gender mainstreaming was a relatively new concept in Central and Eastern Europe and the CIS. Activists, policy makers and legislators who were concerned with securing greater equality between women and men had made many advances in terms of putting women's rights on the legislative agenda, but integrating a gender perspective into all areas of policy and decision-making was lagging far behind. This was the main impetus for creating **Gender Mainstreaming in Practice: A Handbook**.

When this handbook was first tested with practitioners in the summer of 2001, the response was tremendous. At that time, although UNDP Gender Focal Points and their government counterparts had been given the mandate to initiate gender mainstreaming, most had little if any practical experience in the matter. This handbook was therefore designed to meet their pressing need for practical, relevant guidance in gender mainstreaming that was appropriate for the Central and Eastern European Region and the CIS.

Since the development of the first edition of this handbook, it has been translated fully or partly into many local languages, including Russian, Ukrainian, Latvian, Uzbek and Turkmen, with plans for an Armenian translation underway. It has served as the main source material for numerous training seminars and workshops in the region, and has served as the basis for the introduction of a short-term but mandatory course in the Academy of Public Administration under the President of the Russian Federation. Its users have included UNDP staff, parliamentarians, civil servants, lawyers, academics, students, local government employees and NGO activists. Moreover, it has been accessed on the internet and served as a model and example for other UN agencies and in other regions of the world.

In order to continue to meet the demand for this tool, this second edition is now being published. While the basic contents remain the same, several additions and changes have been made based on feedback from the users of the handbook:

- There has been great demand for more information and tools on gender analysis. Therefore we have substantially revised and expanded the material in the accompanying booklet *Gender-Based Analysis: A Brief Guide*. The material is no longer presented in a separate brochure, but is now included in the main book as an annex and includes additional tools and examples of gender analysis in practice.
- In using this Handbook, we have realized that one major obstacle to successful understanding of gender mainstreaming is the lack of a "common language" to talk about the issues. Gender mainstreaming often uses terms and concepts that are unfamiliar to non-gender experts. Therefore we have created and included a **Glossary of Key Terms and Concepts** at the end of the Handbook.
- We have made updates to some of the substantive information provided in examples.
- Minor amendments have been made to the text in order to make the Handbook more user-friendly.

Despite these amendments, we recognize that this Handbook still remains only a starting point for practitioners of gender mainstreaming. We look forward to your continued comments and feedback so that we can continue to revise our gender mainstreaming tools in line with your needs.

We hope that this Handbook will remain a guide and inspiration for your work in making true equality between men and women a reality!

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Author and Editor

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## WHAT IS GENDER MAINSTREAMING?

As defined by the United Nations, gender mainstreaming is:

*“... the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas and at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated.”<sup>1</sup>*

Gender mainstreaming is not only a question of social justice, but is necessary for ensuring equitable and sustainable human development by the most effective and efficient means.

### Why is “Gender Mainstreaming” new?

Gender mainstreaming makes a gender dimension explicit in all policy sectors. Gender equality is no longer viewed as a “separate question,” but becomes a concern for all policies and programmes. Furthermore, a gender mainstreaming approach does not look at women in isolation, but looks at women and men - both as actors in the development process, and as its beneficiaries.

Significantly, gender mainstreaming differs from a “women in development” (WID) approach in that it takes as its starting point a thorough and rigorous analysis of the development situation, rather than a priori assumptions about women’s roles and problems. Experience has shown that gender issues differ by country, region and concrete situation. At the same time, experience has also shown that rigorous, gender-sensitive analysis invariably reveals gender-differentiated needs and priorities, as well as gender inequalities in terms of opportunities and outcomes. Gender mainstreaming seeks to redress these problems.

Given the above, it is clear that a “gender mainstreaming” approach does not necessarily make the need for specific policies, programmes or projects on gender equality obsolete. The level of intervention (from basic “gender sensitivity” to comprehensive, targeted gender programmes) will depend on the specific needs and priorities revealed by a gender-sensitive situation assessment.

Finally, as a comprehensive strategy, gender mainstreaming should also address the environment (corporate, office) in which policies and programmes are developed and implemented. Thus a strategy to integrate gender concerns into programming must be accompanied by a strategy to ensure that the working environment is gender-sensitive, guaranteeing equal opportunities and treatment to both men and women. Sufficient technical capacity and human resources to successfully implement gender mainstreaming must also be ensured.

## WHO IS THE HANDBOOK FOR?

**This handbook is designed specifically for policy-makers who are not experts in gender issues**, but who nonetheless are charged with the day-to-day responsibility of gender mainstreaming, according to organizational mandates. This handbook is meant to guide these professionals in their work.

At the same time, this handbook will be interesting and useful to other groups concerned with mainstreaming:

- UNDP programme staff can use it as a guide for gender mainstreaming in project and programme management;
- non-governmental organizations and advocacy groups can use it to monitor and support the actions of government and international organizations;

<sup>1</sup> The Report of the Economic and Social Council for 1997. United Nations, 1997.

- students can gain an appreciation for how gender mainstreaming works in practice;
- supervisors of policy makers and project staff can gain a better understanding of the ways in which gender mainstreaming will affect the workplans of their staff, and can subsequently incorporate gender mainstreaming into their performance appraisal systems, while also allocating adequate budget resources;
- gender focal-points and gender experts may find this handbook useful as a quick and succinct reference in their own work, or when training others.

## HOW DO I USE THIS HANDBOOK?

This handbook is divided into two parts:

### **Part I – Gender Mainstreaming: 10 Steps for Integrating Gender into the Policy-Making Process**

Part I of this handbook provides practical guidance for gender mainstreaming in any policy area or sector. The gender mainstreaming process is divided into 10 stages, and each stage is described with the help of various tools and checklists.

Although these 10 steps are presented as a cycle, you should begin with the Step that is the most appropriate entry point for the task at hand.

### **Part II – Gender Briefs: A Sectoral Approach to Mainstreaming**

Part II is divided into a series of “Gender Briefs”, organized according to sector or policy area. These Briefs highlight the main “gender issues” in each area, the main arguments for gender mainstreaming in this area, as well as possible indicators of progress and entry points for action.

The step-by-step approach outlined in Part I of the handbook can thus be used as a framework for working with the more substantive aspects outlined in Part II’s Gender Briefs.

The information contained in the Gender Briefs cannot be exhaustive, as specific situations will undoubtedly vary according to country or region and over time. However, these Briefs should serve as a useful starting point.

Part II begins with a more detailed introduction to the use of the Gender Briefs.

**GENDER MAINSTREAMING:  
10 STEPS FOR INTEGRATING GENDER INTO  
THE POLICY-MAKING PROCESS**



## INTRODUCTION TO PART I

### 10 Steps for Integrating Gender into the Policy-Making Process

Gender mainstreaming, by definition, involves integrating a gender perspective and gender analysis into *all* stages of designing, implementing and evaluating projects, policies and programmes.

**Part I** of this handbook provides practical guidelines and advice for translating this theory of gender mainstreaming into practice. To do so, **Part I** examines 10 different but interdependent stages in the project or policy process. Gender mainstreaming is not an isolated exercise, but an integral part of the project or policy cycle.

**Part I** can in fact be approached as a checklist – this checklist will help you identify what activities you have already implemented, while also providing you with guidance for expanding your approach to gender mainstreaming.

The **10 Steps for Gender Mainstreaming** include:

1. A Mainstreaming Approach to Stakeholders: Who are the Decision-Makers?
2. Mainstreaming a Gender Agenda: What is the Issue?
3. Moving Towards Gender Equality: What is the Goal?
4. Mapping the Situation: What Information do we Have?
5. Refining the Issue: Research and Analysis
6. Formulating Policy or Project Interventions from a Gender Perspective
7. Arguing Your Case: Gender Matters!
8. Monitoring: Keeping a (Gender-Sensitive) Eye on Things
9. Evaluation: How Did We Do?
10. En-gendering Communication

#### IS GENDER MAINSTREAMING REALLY SO COMPLICATED ?

*You should not feel overwhelmed by the task of gender mainstreaming. While it is true that in-depth gender-based analysis requires a sophisticated level of expertise, this, when required, can be outsourced to experts.*

*For the most part, practical gender mainstreaming is about running through a **checklist** of questions to ensure you have not overlooked anything. It is about **asking the right questions** so that you can see where limited resources should best be diverted. Gender mainstreaming is a necessary process for achieving gender equality in the **most effective and efficient** manner.*

**Step 1** concerns the project and policy making context. The people involved in the process, along with their values and understanding of gender issues, will significantly determine the outcome of your policy or project.

During Step 1 you should seek answers to the following three key questions:

- Who are the stakeholders? Do they include individuals or groups with a “gender perspective”?

*Gender mainstreaming means that “gender” stakeholders need to be identified and included throughout the policy or project cycle. Multiple stakeholders bring greater accountability and a wider variety of options to the policy-making process. It also introduces a series of “checks and balances” against competing viewpoints. Negotiating these multiple viewpoints will result in better policy-making.*

#### STEP 1

### A Mainstreaming Approach to Stakeholders: Who Are the Decision Makers?

- Is there gender balance in all institutions and bodies involved?

*If strong gender imbalance exists among stakeholders or the core policy making group, take measures to involve more of the underrepresented gender – be it men or women. This is a question of accountability and credibility.*

- Where is gender expertise available?

*Stakeholders with gender expertise will help you identify entry points for gender mainstreaming and implement a mainstreaming approach throughout the entire project or policy-making cycle. These experts are important allies. Such expertise might be found with policy-making colleagues, academics, consultants, NGOs or community groups, or development partners. Bringing this expertise aboard is mainstreaming at its most basic level.*

#### GENDER-SENSITIVE STAKEHOLDER CHECKLIST

*Have the following individuals and groups been brought into the policy or project cycle?*

- Gender focal points in other ministries or departments?
- Development partners with a gender equality mandate?
- A governmental or independent economist with gender expertise?
- Male and female representatives of private sector interests?
- An umbrella organization of women's or gender NGOs?
- Any NGOs or community groups that represent men's gender interests?
- Relevant sectoral or "special interest" NGOs that have an interest or experience in gender issues?
- Human rights groups or advocates?
- Think tanks or policy analysts with experience and expertise in gender issues?
- Academics or researchers from university Gender Studies departments?

## STEP 2

### Mainstreaming a Gender Agenda: What Is the Issue?

During **Step 2**, you should first identify the main development problem or issue at hand. This can be accomplished by answering a basic question:

- What is the subject of your project or policy-making initiative?

This subject then needs to be examined from a gender perspective, in order to discern where, why and how specific gender mainstreaming initiatives may need to be applied. The following question will help you decide what the "gender issue" is:

- Does this issue affect men and women in different ways?

Experience has shown that in many or even most cases, the issue *does* in fact affect men and women in different ways. In these instances, this means that the specific ways in which men and women are differently affected need to be refined (see **Gender Mainstreaming Steps 4 and 5**). Gender analysis is a vital part of clarifying the precise gender dimension of the issue (see Annex: **Gender Analysis – A Brief Guide**). The Gender Briefs in Part II can help you identify the "gender issues" of various development problems.

Step 2 is thus your first look through the "gender lens." While at this stage you will not yet be identifying specific gender problems that require policy solutions, Step 2 should introduce an appreciation of gender-related aspects of seemingly "gender-neutral" issues.

## STEP 3

Moving Towards Gender Equality:  
What Is the Goal?

Once you have identified the “subject” of your project or policy-making initiative, you should discern what your goal is. You can do this by asking:

**What do we want to achieve?**

In Step 2, you will have identified any gender dimensions inherent in the policy issue. It is also equally important to make this gender dimension explicit in your policy goal. This can happen in two different ways, and can be identified by asking two different questions:

- **Does the goal pay attention to both men and women?**

*The policy or project goal should address any differences between men and women and seek to redress them. If men and women have different needs, then the goal should be to meet both the needs of women **and** the needs of men. If men or women are disadvantaged in the given situation, then the policy goal should seek to redress this imbalance. These goals are thus “**corrective**”; they are about meeting the **practical needs** of both men and women.*

- **Does the goal include a broader commitment to improving gender equality?**

*The policy or project goal should also be examined in the light of gender equality more broadly. Perhaps elements of the institutions, structures or underlying principles that contextualize the issue fundamentally hinder de facto equality between men and women. If so, the goal should be broadened to address these elements as well. These goals are thus “**transformative**”; they are about **transforming institutions and structures** (social, political, economic, cultural, etc.) so that full gender equality can be more readily achieved.*

These broad goals will be translated into specific targets and objectives (see **Step 6**), once you have refined the question (see **Step 5** and Annex: **Gender Analysis – A Brief Guide**) and are ready to develop concrete policy interventions.

## STEP 4

Mapping the Situation:  
What Information Do We Have?

In **Step 2** you have discerned what your policy issue is and identified potential gender dimensions of this issue. In **Step 3** you have identified the overall intended goals your policy or project interventions, and ensured these are gender-sensitive.

In Step 4 “Mapping the Situation,” you must start thinking about refining both your question and your potential policy interventions. In order to do this, it is important to have an **inventory** of:

- **what you know**
- **what you don’t know**
- **what projects or policy interventions have already happened**
- **what is currently happening**
- **what other related interventions are planned**

Answering the above questions will help you focus on “filling in the gaps”, commissioning or undertaking necessary research and planning complementary initiatives rather than “reinventing the wheel”. Mapping the Situation is also a critical stage for introducing **efficiency** into the mainstreaming process.

Three tools and exercises are suggested that will help you answer the above questions:

- 1) **Mapping Exercise**
- 2) **Policy Review from a Gender Perspective**
- 3) **Legislative Review from a Gender Perspective**

## GENDER MAINSTREAMING TOOL #1

### A Mapping Exercise

One useful tool involves undertaking a “mapping exercise” in relation to the sector or policy issue you are addressing, in order to systematically inventorize what you know and what you do not know, as well as prior, on-going and planned interventions. You do not require any additional financial resources to perform this exercise.

**Time required:** The actual time required to fill in the chart (below) is minimal. However, because you may have to wait for inputs from counterparts and colleagues, you can expect the exercise to require one-two weeks.

Helpful Sources of Information:

- Database of government legislation
- Database of government documents
- Database of government-commissioned research
- Database of donor-funded technical assistance
- Database of NGO activities

**Methodology:** Based on information you have and are able to access from colleagues and other stakeholders, fill in the table, row by row:

1. **First row (Sectoral or Policy Issues):** Identify the main policy issues of concern (i.e. these may be sub-sectors or sub-issues). Use as many columns as you need.
2. **Second row (Gender Questions):** Ask questions about potential gender dimensions of the sub-issues (these questions can be identified during Gender Mainstreaming - Step 2 in answer to the question: *Does this issue affect men and women in the same way?*)
3. **Additional rows:** From there, simply fill in what you know about this issue according to the categories in the left-hand column (the information in *italics* is meant to guide you in filling in the table). Make note of any questions where information is missing.

**Using Your Results:** Once you have filled in the table as far as possible, the gaps should highlight where additional research, policies, etc. might be necessary. Updating your table can serve as a **monitoring tool** for your progress in gender mainstreaming.

GENDER MAPPING EXERCISE <sup>2</sup>			
1	2	3	4
<b>Sectoral or Policy Issues →</b>	<i>Issue 1</i>	<i>Issue 2</i>	<i>Issue 3 , etc.</i>
<b>Gender Questions →</b>	<i>What are the questions you should ask to help you identify any “gender dimensions” of the issue? What do you want to find out, in terms of gender equality?</i>	<i>What are the “gender questions” of Issue 2? etc.</i>	<i>What are the “gender questions” of Issue 3? etc.</i>
<b>What Do You Know? ↓</b>			
<b>Indicators (quantitative and qualitative)</b>	<i>Are there any indicators that are regularly monitored which answer the gender question? What are they? Who keeps track of them?</i>		
<b>Research Reports available</b>	<i>Do you have any research reports that answer the gender question? Do any of your colleagues?</i>		

<sup>2</sup> Adapted from S. Tadjbakhsh, Presentation to UNDP Latvia, April 2000.

1	2	3	4
<b>Govt. Programme</b>	<i>Are there any government programmes that address Issue 1? Is the gender dimension explicitly addressed here?</i>		
<b>Govt. Policy/Legislation</b>	<i>What policies and legislation address issue 1? Do they also take the gender dimension into account?</i>		
<b>NGO Projects</b>	<i>Do you know of any NGO projects that deal with issue 1? Do they include the gender dimension?</i>		
<b>Donors' activities</b>	<i>What donor activities address issue 1? Are the gender issues addressed?</i>		

NOTE: This Mapping Exercise is not an ANALYTICAL framework. It will not suggest potential policy solutions or interventions. Rather, it will help you understand what “tools”, in the way of existing policies, programmes or data, you have to work with in order to ensure gender mainstreaming.

### Sample Mapping Exercise:

The following page shows a brief example of how you might use Tool 1 to map the situation in the information and communication technologies (ICT) sector in “Country X”.

Once completed, the “map” should indicate which areas require further gender analysis and investigation.

INFORMATION AND COMMUNICATION TECHNOLOGIES (ICT) in Country X			
1	2	3	4
<b>Sectoral or Policy Issues →</b>	<i>Access to internet</i>	<i>Development of E-commerce for SMEs</i>	<i>Jobs in the IT sector</i>
<b>Gender Questions →</b>	<i>Do men and women have equal access to internet? What are the effects of gender imbalance? Do men and women use the internet for different purposes?</i>	<i>Are men and women equally involved in the development of e-commerce? Will e-commerce affect men and women differently?</i>	<i>Do men and women have equal access to jobs in the IT sector? What are the barriers? What are the effects of gender imbalance?</i>
<b>What Do You Know? ↓</b>			
<b>Indicators (quantitative and qualitative)</b>	<i>Internet user statistics are not disaggregated by gender</i>	<i>74% of SME managers are male. No specific data on e-commerce SME managers.</i>	<i>Labour market survey data: - 73% of IT jobs held by men - 91% of IT management jobs held by men - 71 of IT students – male</i>
<b>Research Reports available</b>	<i>A recent review of IT by the Ministry of Communications did not highlight any gender implications</i>	<i>Gender impact assessment already undertaken on SMEs in general – expert should be hired to apply the conclusions to e-commerce in specific</i>	<i>No gender impact assessment of effects of this imbalance has been commissioned.</i>

1	2	3	4
<b>Govt. Programme</b>	<i>No current programmes.</i>	<i>Small pilot project in district P to increase number of women involved in SME sector. No programmes on e-commerce development.</i>	<i>No current programmes.</i>
<b>Govt. Policy/ Legislation/</b>	<i>New concept paper on universal access has been drafted. Gender not mentioned. Special target groups noted:</i> <ul style="list-style-type: none"> <li>- school children</li> <li>- unemployed</li> </ul>	<i>New policy for development of e-commerce has been drafted. No gender aspect included. Labour Code prohibits gender discrimination.</i>	<i>Labour code prohibits gender discrimination. "Education for All" policy mentions target of equal enrolment of boys and girls in all programmes (what about engineering and IT?)</i>
<b>NGO Projects</b>	<i>Rural women's NGO Z currently providing training to women on how to use computers.</i> <ul style="list-style-type: none"> <li>- other projects?</li> </ul>	<ul style="list-style-type: none"> <li>- NGO business support centre in district R</li> <li>- SME training for women conducted by NGO Q in 5 cities</li> </ul>	<i>NGO "Women in Science" – do not know what they exactly do.</i>
<b>Donors' activities</b>	<i>Donor Y is currently funding free internet access in libraries. No gender dimension explicit in this project.</i>	<i>Donor Z financing e-commerce incubators in district P in conjunction with government programme.</i>	<i>None known.</i>

## GENDER MAINSTREAMING TOOL #2

### Policy Audit from a Gender Perspective

A more in-depth policy review from a gender perspective can assist you in evaluating the extent to which gender concerns are currently reflected in public policy and programmes (you may wish to engage a gender expert to assist you in this task).

This process consists of examining the following elements of policy:

#### (a) Gender Equality as a Policy Priority:

*Is there a mandate and statement of political will for enhancing gender equality at the national (regional or local) level?*

A policy document (e.g. a National, Regional or Local Plan for Gender Equality) that expressly states the government's commitment to gender equality as an issue is significant, as it provides a mandate for the development of sectoral policies from a gender perspective (i.e. mainstreaming).

Your policy audit should thus begin by reviewing the existence of gender equality concerns in any major policy commitments or pledges.

Secondly, you should review whether this mandate expressly outlines *how* and *by whom* gender mainstreaming is to be undertaken, as this should delineate lines of accountability and responsibility. Any credible policy should also outline concrete goals, objectives and indicators of success.

**(b) Sectoral Policies on Gender Mainstreaming:**

*Do ministries or departments have specific policies for gender mainstreaming?*

Again, a mandate for gender mainstreaming should be contained in a policy document (a Ministerial or Sectoral Plan for Gender Equality). Again, such policies should explicitly outline *how* and *by whom* gender mainstreaming is to be undertaken, as well as concrete goals, objectives and indicators of success.

**(c) A Gender-Sensitive Approach to Sectoral Policy and Programmes:**

*Do policies in each sector or policy area reflect a gender perspective?*

A review of all policies and programmes in a specific sector or policy area should be conducted to more thoroughly examine the extent to which a gender perspective has been taken into consideration. This review should ask and seek answers to the following questions:

- Was gender expertise part of the information and consultation inputs into programmes and policy formulation?
- Does the policy explicitly address gender issues in defining the problem?
- Do policy actions and solutions consider the potentially differential impact on men and women? Are target groups identified accordingly?

A gender audit of policy should also point to any gaps where new policies on specific gender issues might be necessary (e.g. policy on gender-based violence, or anti-discrimination in the work-force).

**GENDER MAINSTREAMING TOOL #3****Legislation Audit from a Gender Perspective**

Similarly, a review of existing legislation can be undertaken to analyze the extent to which a gender perspective has been mainstreamed into current legislation. This should be undertaken by someone with both legal and gender expertise.

A legislative review from a gender perspective should ask and seek answers to the following questions:

[LINK: See also Gender Brief on JUSTICE AND HUMAN RIGHTS: Legislation](#)

- Is there adequate basic legislation that prohibits discrimination on the basis of sex (Constitutional law, Anti-discrimination Act)?
- Is there any evidence of explicit discrimination against men or women in any legislation?
- Is there evidence that implementation of legislation may result in indirect discrimination against men or women?
- Was gender expertise part of the information and consultation inputs into the drafting of legislation?

**STEP 5****Refining the Issue: Research and Analysis**

“Mapping the Situation” (Step 4) will have underlined where specifically a gender-mainstreaming perspective is required: existing policies may need to be amended in order to include a gender perspective, or new policies may need to be developed. Step 4 should have also made clear where gaps in your current information base exist.

During Step 5, you will need to conduct or commission research that will fill in these gaps. This is absolutely crucial in order to guarantee the **credibility**, **efficiency** and **effectiveness** of any projects or policies you develop.

This phase involves:

- **Specifying the research question**
- **Determining necessary inputs**
- **Designing and/or Commissioning the research**

**1) SPECIFYING THE RESEARCH QUESTION:**

The research question needs to be concrete and specific in order to be useful for policy making or project development. The most crucial factor will be understanding what **output** is required from the research. This is necessary in order to provide precise **terms of reference** for the researchers.

**WHAT IS THE DESIRED OUTPUT OF THE RESEARCH?**

**Situational Analysis:** If you have absolutely no data on a given subject, a situational analysis may be required. However, bear in mind that situational analyses do not provide you with concrete policy options or recommendations.

**Policy Options/Recommendations:** If your goal is the development of concrete policies, policy researchers and analysts should provide you with a “policy brief” that contains several options and highlights the advantages and disadvantages of each. These considerations should examine:

- **efficiency (cost-benefit analysis),**
- **effectiveness (coverage, scope, sustainability), and**
- **extent to which gender issues are addressed: are needs of both men and women met? Are frameworks of gender roles and relations transformed?**

**2) DETERMINING NECESSARY INPUTS:**

Research can be conducted in one of two ways:

- **in-house; or**
- **outsourced** (to individual experts, civil society groups, think tanks or commercial research firms)

Your budget, technical capacity and expertise, alongside the scope of the research, are the factors which will determine which route you choose. In either case, those conducting the research must meet the following criteria:

- **substantive expertise** concerning the sectoral or policy issue;
- **gender expertise** (i.e. professional and/or academic training in gender theory as pertains to public policy);
- **specific technical expertise** as demanded by the research question (i.e. economic modelling, population-based survey design, etc.).

The appropriate balance of these three elements is crucial for producing viable policy options. You may need to engage a **team** of researchers to ensure all three capacities.

### 3) COMMISSIONING THE RESEARCH:

Regardless of whether the research is conducted in-house or outsourced, you should refer to the following questions when evaluating any research proposals:

#### CHECKLIST FOR EVALUATING RESEARCH PROPOSALS:

- **Researchers:** Who will be involved in the gathering and analysis of data? Is gender balance and a gender perspective (expertise) ensured?
- **Subjects:** Will the situation of both genders be researched? Will data be disaggregated by gender?
- **Methodology:** What methodology will be used? Is it sensitive to both men's and women's particular needs? (e.g. confidentiality, sensitivity to some issues)
- **Analytical Axes:** Does the research include gender as a important variable in determining social processes? Are other important axes for analysis considered (ethnicity, socio-economic status, geographical location, etc.)?
- **Theoretical Frameworks and Assumptions about Gender:** Is the researcher familiar with baseline theories about gender inequalities? What assumptions or biases do they hold about gender roles and relations that might impact (and distort) their research findings?
- **Credibility:** Have steps been taken to ensure that results will be credible in the eyes of all stakeholders (both men and women) Will they have the chance to provide inputs and comments?

\* [LINKS: See also ANNEX: GENDER ANALYSIS: A BRIEF GUIDE](#)  
See also [Part II – Science, Research and Information Technologies](#)

Once you have collected and analyzed the necessary data and information, you will have to decide on the appropriate course of action to move towards the goal articulated in **Step 3**.

Choosing the “correct” course for policy or project intervention is rarely straightforward. It involves balancing a number of crucial considerations, including:

#### CRUCIAL CONSIDERATIONS FOR POLICY OPTIONS:

- **efficiency** – cost-benefit analysis;
- **effectiveness** – the degree to which your goal will be met; and
- **social justice**, including **gender equality** – the extent to which social and historical disadvantages between different groups in society are addressed and compensated.

The economic, social, equity, community, environmental and other types of impact of each option need to be assessed. To ensure a gender perspective, a “gender impact assessment” should also be conducted for each option. This should consider the following key questions<sup>3</sup>:

<sup>3</sup> Questions adapted from “Gender-Based Analysis: A Guide for Policy-Making” prepared by Status of Women Canada (1998).

## STEP 6

### Formulating Policy or Project Interventions From a Gender Perspective

**GENDER IMPACT ASSESSMENT CHECKLIST:**

- **What benefit (financial, human) will the option bring to both men and women ?**
- **What cost (financial, human) will the option inflict on both men and women?**
- **How do both female and male stakeholders perceive the option in terms of its costs, benefits, acceptability and practicality?**

The results of this assessment should be considered when weighing policy options. Additionally, you should consider:

- **What might the wider consequences be of failing to adopt a gender-sensitive option?**

After weighing these factors carefully, you will be ready to formulate your intervention. This will entail preparing the actual policy or project document.

**GENDER MAINSTREAMING CHECKLIST FOR PROJECT OR POLICY DOCUMENTS:**

- **Background and Justification:** Is the gender dimension highlighted in background information to the intervention? Does the justification include convincing arguments for gender mainstreaming and gender equality? (See **Step 7**)
- **Goals:** Does the goal of the proposed intervention reflect the needs of both men and women? Does the goal seek to correct gender imbalances through addressing practical needs of men and women? Does the goal seek to transform the institutions (social and other) that perpetuate gender inequality? (See **Step 3**)
- **Target Beneficiaries:** Except where interventions specifically target men or women as a corrective measure to enhance gender equality, is there gender balance within the target beneficiary group?
- **Objectives:** Do the intervention objectives address needs of both women and men?
- **Activities:** Do planned activities involve both men and women? Are any additional activities needed to ensure that a gender perspective is made explicit (e.g. training in gender issues, additional research, etc.)?
- **Indicators:** Have indicators been developed to measure progress towards the fulfilment of each objective? Do these indicators measure the gender aspects of each objective? Are indicators gender disaggregated? Are targets set to guarantee a sufficient level of gender balance in activities (e.g. quotas for male and female participation)? (See **Step 8**)
- **Implementation:** Who will implement the planned intervention? Have these partners received gender mainstreaming training, so that a gender perspective can be sustained throughout implementation? Will both women and men participate in implementation?



- **Monitoring and Evaluation:** Does the monitoring and evaluation strategy include a gender perspective? Will it examine both substantive (content) and administrative (process) aspects of the intervention? (see **Steps 8 and 9**)
- **Risks:** Has the greater context of gender roles and relations within society been considered as a potential risk (i.e. stereotypes or structural barriers that may prevent full participation of one or the other gender)? Has the potential negative impact of the intervention been considered (e.g. potential increased burden on women or social isolation of men?)
- **Budget:** Have financial inputs been “gender-proofed” to ensure that both men and women will benefit from the planned intervention? Has the need to provide gender sensitivity training or to engage short-term gender experts been factored in to the budget?
- **Annexes:** Are any relevant research papers (or excerpts) included as annexes (particularly those that provide sound justification for your attention to gender)?
- **Communication Strategy:** Has a communication strategy been developed for informing various publics about the existence, progress and results of the project from a gender perspective? (See **Step 10**)

## STEP 7

**Arguing Your Case: Gender Matters!**

One crucial aspect of gender mainstreaming involves developing arguments for gender equality. Because experience has shown that decision makers are sometimes reluctant to devote scarce resources to gender equality activities, decision-makers (especially those who control budgets) need to be convinced that their investment in gender equality will pay off.

Decision-makers need to be presented with arguments that highlight, *concretely and precisely*, why gender matters. In other words, you must illustrate what development problems gender equality contributes to solving, and what specific benefits a gender-aware perspective will bring to the government, individuals –both men and women - and the nation as whole. Well-defined arguments will increase your chances of receiving financial and moral support for any planned interventions.

**THE “ADDED VALUE” OF GENDER MAINSTREAMING:**

Arguments for adapting a gendered approach and for promoting gender equality in all projects and policies generally fall into one of the following 6 categories:

- **Justice and Equality**
- **Credibility and Accountability**
- **Efficiency and Sustainability (the “macro” dimension)**
- **Quality of Life (the “micro” dimension)**
- **Alliances**
- **Chain Reaction.**

**Justice and Equality Arguments:** These stress the value of democratic principles and basic human rights, which demand gender equality. Justice arguments can be used to argue for equal representation and participation of both genders in various contexts, premised on the basic notion of their shared human rights.

Most states are party to a variety of normative documents (for example, The Convention on the Elimination of All Forms of Discrimination Against Women and global conference documents from Beijing, Copenhagen and Cairo), all of which establish gender equality as a fundamental principle. States are obliged to fulfil

these commitments, especially as many basic democratic principles articulated here reflect most states' own constitutions.

While experience has unfortunately shown that the justice argument alone is often insufficient to convince governments to mobilize adequate resources, these arguments are nonetheless useful for providing reference to specific mandates for gender equality and international commitments. They remind governments that they are part of an international (or regional) community that espouses shared values.

**Credibility and Accountability Arguments:** Credibility arguments ask decision makers to “do the math”: because women and men each make up half of the population, any data, policy or recommendation that does not recognize and address both genders equally will be ultimately flawed, and will thus have no credibility. These arguments are useful for justifying gender impact assessments (studies that examine how men and women are, will be or have been differently affected by actions or situational factors), or calling for more gender balance in decision-making processes.

Accountability arguments in particular are useful for reminding governments of their responsibility to ensure social justice and sustainable human development. In democratic states, governments must be accountable to the population and must further the interests of all its members – both men and women. A failure to address social justice or gender equality issues is also a failure of governments to be accountable to all citizens. Furthermore, many gender-sensitive interventions are not just gender exercises for their own sake – they are about holding governments accountable for their use of public funds and for the fulfilment of their political promises. Gender mainstreaming can offer concrete mechanisms for introducing a greater degree of accountability into governance.

**Efficiency and Sustainability Arguments<sup>4</sup>:** These arguments make clear an irrefutable fact: equal inclusion of men and women in all aspects of development and society pays off for the country as a whole. Nations cannot afford to ignore the contributions and economic and social capacities of both men and women in all spheres. The development of any country that does will ultimately suffer in the medium and long term. This is an argument that addresses “macro” aspects of development – i.e. the welfare and prosperity of a nation as a whole.

These arguments are particularly effective because they address the bottom line: money. They prove that investment in gender equality will pay off for the country as a whole in the future. Global studies have been done that prove the overall efficiency arguments<sup>5</sup> – these can assist you to make your argument, as will any national research you have to substantiate your case.

Closely linked to efficiency arguments are sustainability arguments. Because gender mainstreaming adopts a “human development” perspective, which has the long-term objective of creating a socially just and sustainable society, gender mainstreaming is inextricably about ensuring sustainability as well. Furthermore, because gender mainstreaming demands a holistic approach to policy making where coordination and cooperation (both vertical and horizontal) are key, interventions are more likely to be sustainable.

**Quality of Life Arguments:** Increased attention to gender equality issues will improve the lives of individual men and women. In a democratic society based on principles of social justice, each individual member has the right to the best quality of life possible. Gender mainstreaming initiatives seek to further this objective.

Moreover, while it is commonly recognized that women stand to benefit from increased attention to gender equality, quality of life arguments also point out the benefits to be gained by men and families as well. They stress the importance of social relationships and interdependence of social actors, claiming, for example, that if women are empowered, those closest to them stand to gain as well. On the flip-side, inequality or hardship for one gender will negatively affect other social actors as well. For example, the negative effects of depression in men or poor employment opportunities for women affect families, children and spouses as well.

Moreover, quality of life arguments are useful for promoting a gender dimension in programmes aimed at curbing social “pathologies”. For example, issues such as suicide, alcoholism, addictions and chronic stress are strongly linked to changing gender roles and relations in society and the inability of individuals to cope

<sup>4</sup> Care should be taken, however, when using efficiency arguments to avoid stressing that women are an “underutilized resource.” As Diane Elson has noted, the problem for many women is that they are in fact “overutilized” (quoted in OECD:1998). The focus should be placed on recognizing and appropriately valuing the contributions of both genders. The goal is not to burden women further, but to strive for a renegotiation of women’s and men’s roles in society, that will ultimately result in increased levels of development and prosperity.

<sup>5</sup> see specifically the World Bank Policy Research Report Working Paper Series on Gender and Development.

and adapt. The argument here therefore underlines how a gender perspective can limit these pathologies and improve the quality of life of members of society.

These arguments address “micro” aspects of development and gender, i.e. the ways in which individuals within a development context are affected. However, this argument has a natural link to efficiency arguments: if individuals are happier and healthier, they will also be more productive, thus contributing to a more efficient and prosperous society.

**Alliance Arguments:** Alliance arguments highlight gender equality as a prerequisite for forging formal alliances or partnerships with other nations. In the context of Eastern and Central Europe, accession to the European Union is a very salient example: EU countries are mandated to implement various instruments for the promotion of gender equality, including the adoption of gender mainstreaming practices.

However, while this argument is currently very effective for calling governments to task, it is ultimately unsustainable unless coupled with concrete substantive reasons (such as efficiency and quality of life) as to why issues of gender equality need to be addressed. Without these solid substantive arguments, alliance arguments can backfire.

**Chain Reaction Arguments:** Lastly, all of the above arguments are strengthened when the links between them are highlighted. Gender equality can in fact produce a “chain reaction” of benefits, just as the effects of gender inequality can be passed on from individuals to families and communities. The “chain reaction” argument highlights how sound the investment in gender equality actually is: it will bring not only short-term, localized benefits, but medium and long-term benefits that will ripple through society strengthening the nation as a whole.

At the same time, mainstreaming should also remain aware of “chain reactions” that might produce negative gender equality effects if not anticipated and dealt with in an integrated manner. For example, a “top down” mandate for family-friendly workplaces might bring backlash and even greater exposure to harassment against women in their place of work. Similarly, advancement of women may lead to greater depression and pathological behaviour among men. These risks highlight the crucial need to create complex strategies for gender mainstreaming, whereby a number of initiatives are mutually reinforcing. Thus a negative chain reaction argument can be used to convince decision-makers that mainstreaming must proceed in a *strategic and holistic* manner.

### “SELLING” GENDER MAINSTREAMING!

Finally, you should be aware that you may encounter resistance to your gender mainstreaming activities. Reasons for resistance vary, from misinformation or lack of information about gender issues, to restricted resources, to cultural or traditional perceptions about gender roles.

Therefore, it is useful to be equipped with potential strategies for combating this resistance. Tips for dealing with resistance include<sup>6</sup>:

- When seeking programme or policy approval, approach decision-makers with concrete proposals, preferably in writing. In cases where you have a programme and budget proposal, it may be useful to present the programme first, and once general approval is attained, a budget can be presented. Use concrete data and research (preferably from your country or region) to back up your arguments.
- Responding to questions such as “Why should gender equality be a priority in a time of economic hardship?” is particularly difficult. The focus of argumentation here should remind decision-makers that gender mainstreaming and gender equality enhance efficiency (see above).
- Stress that gender mainstreaming is not only about women; it is about men and society in general. This is also a way of allowing men to feel more comfortable as part of the gender mainstreaming process, and reminds them that they too have a responsibility and a role to play in ensuring gender equality.

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<sup>6</sup> These tips have been developed according to experienced shared by participants in three sub-regional seminars on Gender Mainstreaming organized by UNDP RBEC in June-August 2001. Thanks to all for their ideas and suggestions!

- When presenting your case, you should tap into political momentum. Timing is key and opportunities should be sought where public opinion has already been built up as a “springboard” for your request or proposal.
- Remind decision-makers of how your request/proposal will benefit them directly, in terms of improving their image and credibility (i.e. enhancing their political capital). Similarly, it is important to be positive rather than confrontational, understanding and taking into account restrictions and obstacles that decision-makers face. You should try always to offer “win-win” situations.
- Try to offer a number of options, allowing decision-makers to choose for themselves the most appropriate one. Being flexible and open to compromise will work in your favour. “Pilot programmes” are good, cost-effective ways of demonstrating added value which can be replicated in the future.
- Unfortunately, sexual harassment and unprofessional attitudes towards people involved in gender work are serious barriers that may not be easily surmountable through good argumentation strategies. This is one reason why gender sensitivity and efforts to change attitudes within organizational structures are vital elements in the gender mainstreaming process.

## STEP 8

### Monitoring: Keeping a (Gender-Sensitive) Eye on Things

*Monitoring is an indivisible aspect of gender mainstreaming. Three aspects of monitoring include:*

- I. LEVELS OF MONITORING
- II. GENDER-SENSITIVE MONITORING PLANS
- III. GENDER-SENSITIVE TARGETS AND INDICATORS

#### I. LEVELS OF MONITORING

Monitoring should take place at two different levels:

- Monitoring **progress** towards fulfilling substantive goals and objectives
- Monitoring the implementation **process**

Both require setting targets (goals) and developing indicators to measure progress towards meeting those targets.

When **monitoring progress towards substantive goals and objectives**, indicators must be developed that track the delivery of specified outputs (activities) and outcomes (impact).

When **monitoring the implementation process**, targets and indicators must be developed that track the extent to which the process itself is gender-sensitive. Monitoring the process will:

- allow you to identify hindrances and gaps in the process that can be immediately redressed
- allow you to improve the design of future initiatives
- document obstacles to mainstreaming that can be later addressed in a wider institutional context

Questions to consider in monitoring the process might include:

- Are men and women equally participating in project decision-making?
- Are men and women treated with equal respect, as decision-makers, implementers and participants?
- Are those involved in project implementation continually motivated to maintain a gender perspective (opportunities to update their gender knowledge and skills, and discuss gender issues in a non-judgemental environment)?

## II. GENDER-SENSITIVE MONITORING PLANS

**Plans for monitoring** both substantive progress and the implementation process should be developed and included in the official document outlining your intervention. These plans should specify:

- who is responsible for monitoring tasks
- how other stakeholders will participate in the monitoring process
- when monitoring will take place
- what tools will be used to record observations
- what mechanisms exist to review progress (periodic appraisal or review sessions)

## III. GENDER-SENSITIVE TARGETS AND INDICATORS

### Targets

We set targets so that we can “keep our eye on the prize” – targets make our goals concrete, and therefore increase the possibility that they will be attained. Concrete targets also increase the possibility that concrete resources (human, financial) will be diverted in order to achieve those targets.

Effective targets are:

- progressive but realistic
- time-bound
- measurable

Integrating a **gender perspective** means that effective targets are also gender sensitive: they consider the situation and needs of both women and men.

### Indicators

Progress towards achieving targets should be mapped with the help of specific indicators.

Effective indicators are:

- comparable longitudinally (over time) – *indicators that are measured only once cannot show signs of progress or decline*
- comparable with other countries, regions or target audiences
- measurable – *you need to be able to quantify or categorize your results*
- precise – *choose indicators whereby effects of external and environmental factors, other than those you hope to measure, are minimized*
- selective and representative – *too many indicators are difficult to track*

***In programmes and policies that have been “gender mainstreamed,” all indicators should be disaggregated by sex wherever possible. This helps identify the gender differentiated impact of our interventions.***

#### HOW DO I DEVELOP INDICATORS?

The indicators we choose should provide answers to questions we have about substantive progress or the implementation process. Choosing appropriate indicators therefore means:

- **Asking the right question – What do you want the indicator to tell you?**  
*E.g. Are both men and women equally able to access social services?*

- **Determining the information needed to answer the question– What do I need to measure or compare?**

*E.g. Extent to which female needs for existing social services are met as compared to extent to which male needs for existing social services are met.*

- **Identifying the source of such information**

*E.g. Population based surveys on use of social services, which disaggregates and compares responses of men and women.*

### Quantitative vs Qualitative Indicators and Sources of Data

**Quantitative indicators** can be defined as measures of quantity (total numbers, percentages, etc). They are useful for showing what the average outcome is, or the degree to which a goal or objective has been attained.

**Common sources:**

- censuses
- labour-force surveys
- administrative records
- target population-based sociological surveys

**Qualitative indicators** can be defined as people’s judgements and perceptions about a subject. They are useful for understanding processes, but frequently do not show how typical or widespread are the views expressed.

**Common sources:**

- public hearings
- focus groups
- attitude surveys and interviews
- participatory appraisals
- participant observation
- sociological and anthropological fieldwork

Adapted from: Progress of the World’s Women, Unifem 2000, which adapted it from the Canadian International Development Agency, 1996.

**SOME TYPES OF INDICATORS** – There are many different ways to classify indicators. The following table can help you choose which indicators will be most useful in providing an answer to the “monitoring questions” you have formulated.

TYPE	DESCRIPTION	BENEFITS	DRAWBACKS	EXAMPLES
1	2	3	4	5
<b>Checklist indicators</b>	Ask whether something <i>is</i> or <i>is not</i> in place. The measure is a question of “yes” or “no.”	Good for monitoring <i>processes, statements of political will, commitments.</i> Simple and cheap data collection.	Lack qualitative aspect. Sometimes a question of interpretation.	<ul style="list-style-type: none"> <li>• Is a gender mainstreaming policy in place?</li> <li>• Was a gender expert consulted in production of the report?</li> </ul>
<b>Statistics-based indicators</b>	“Traditional” indicators, that measure changes using available statistical data.	Information is readily available.	Rarely provide a qualitative perspective. Often need to be complemented with the other two types.	<ul style="list-style-type: none"> <li>• Male:Female ratio of incidence of HIV</li> <li>• Male:Female unemployment levels</li> </ul>

1	2	3	4	5
<b>Indicators requiring specific forms of data collection</b>	Require specific forms of data collection (sociological surveys, focus groups, interviews, etc). Requires specific, replicable methodology so that data can be compared over time.	Data is often extremely useful and specific. Good means of collecting qualitative data.	Often resource-intensive (time, money, human resources).	<ul style="list-style-type: none"> <li>• % of population that feels women should be primarily responsible for childcare</li> <li>• % of job advertisements in newspapers that show gender bias</li> </ul>

The culmination of the monitoring process occurs during Step 9: Evaluation. This stage is vital for establishing good practices and lessons learned from your initiative, for the ultimate purpose of improving initiatives in the future. Evaluation is also a question of **accountability** for resources used.

## STEP 9 Evaluation: How Did We Do?

Three levels of evaluation include:

1. Evaluation of **outputs** (Have objectives been met?)
2. Evaluation of **outcomes** (To what extent has the development goal been achieved?)
3. Evaluation of **process** (How were outputs and outcomes delivered?)

In order to mainstream a gender perspective, key questions to consider at all levels of evaluation include:

### Evaluation criteria

- Who determines the evaluation criteria?
- What level of importance or priority is afforded to gender equality considerations?

### Evaluation Actors

- Do evaluators' Terms of Reference specify the need for gender expertise?
- Are all stakeholders involved in the evaluation process?
- Who will provide inputs for evaluation data?
- Will the opinions of both men and women be considered?
- Who will be responsible for consolidating inputs and determining the validity and priority of differing opinions or observations?

### Evaluation Process

- Will participatory methods be used?
- How and to whom will results of the evaluation be disseminated?
- Will both men and women stakeholders be given the opportunity to formally comment on or state their reservations about the evaluation results?

## FEEDING BACK INTO A "GENDERED AGENDA"!

Too often, once important gender-sensitive initiatives are completed, the gender issues disappear from the policy agenda. As long as these considerations remain marginalized from mainstream policy agenda-setting, a transformation of gender roles and relations – leading to greater gender equality and positive outcomes for the nation as a whole – will always remain beyond our grasp.

To ensure the sustainability of mainstreaming efforts, consider the following:

- How does your initiative fit into the **“big picture”**, i.e. more comprehensive government programmes and policy frameworks? What entry points for follow-up and complementary activities does this framework offer?
- Does your evaluation include concrete **recommendations** for follow-up initiatives? What other entry points can be accessed to ensure this follow-up?
- Does your evaluation point to **implications** for other ministries or stakeholders more broadly? How will you communicate these implications? Can you propose any concrete entry points?
- Are you documenting the process and results of your initiatives in a way that will guarantee **institutional memory**?
- In general, how and to whom are you **communicating** the results of your initiatives? (see Step 10)

## STEP 10

### En-Gendering Communication

While “communication” figures as the last step in this gender mainstreaming guide, communication considerations themselves need to “mainstreamed” or integrated at all phases of the project or policy cycle. Communication with other stakeholders - from civil society to your superiors – is necessary at all stages and all levels. In every case, the way in which you communicate (both pro-actively and reactively) will influence the success of your project or policy.

[LINK: See PART II, Gender Brief on MASS MEDIA for more detailed analysis of working with mass media to promote gender equality](#)

One of the **barriers** to effective gender mainstreaming is a **lack of information** on various levels, including:

- **about the situation, from a gender perspective**
- **about government or organizational mandates for gender equality**
- **about policies and programmes targeting gender equality**
- **about stakeholders and efforts of other actors in promoting gender equality**

Part of your role must be to design and implement effective communication strategies to help **bridge this information gap** for a diverse set of publics. These publics include:

- Top-level policy makers and decision-makers
- Other policy-makers
- Different groups within civil society (men, women, activists, academics, etc)
- Donors and Development Partners

#### CONSIDERING A “GENDERED PUBLIC”

Using a gender perspective when designing communication strategies should highlight the different ways in which men and women respond to different messages. Key questions you might ask during a gender analysis of communication strategies include<sup>7</sup>:

- Do men and women read different publications?

<sup>7</sup> Questions adapted from “Gender-Based Analysis: A Guide for Policy-Making” prepared by Status of Women Canada (1998).

- Do men and women watch or listen to different electronic media?
- Are media consumption patterns (frequency, time) different for men and women?
- Do men and women have different credibility criteria (regarding “authorities”, arguments used, etc)?
- Do men and women have different values that cause them to respond to certain messages in different ways?

**POSSIBLE INTERVENTIONS FOR COMMUNICATING PROGRESS IN GENDER MAINSTREAMING:**

- **Preparation of an Annual Report on Gender:** *The preparation of such a report by the government can be an important source of statistical information and a tool for tracking progress and disseminating information to a wide audience. Such a report can either be prepared “in-house” by the national gender machinery, or can be sub-contracted to a research organization or NGO.*
- **Use of Electronic Media:** *The use of internet and e-mail (e-mail discussion networks, web page resources and “virtual discussions”) can be an efficient and effective way of bridging the communication gap.*
- **Establishment of a Gender Policy Resource Centre:** *Creating a central “clearing house” for reports, bulletins, books and other information on gender policy can make gender mainstreaming more efficient and can contribute to strengthening the profile of gender issues within governance at the national level.*



**GENDER BRIEFS:  
A SECTORAL APPROACH TO  
GENDER MAINSTREAMING**



## INTRODUCTION TO PART II

The purpose of this introduction is to guide users in the content, structure and potential applications in PART II – the sectoral “Gender Briefs”.

### Which Gender Briefs should I look at?

- ✓ Look at those Briefs that discuss the policy sector or area which is your own professional area of focus.
- ✓ Other Briefs may be helpful in identifying links between sectors – thus pointing out ways that you can cooperate with other professionals in different sectors to promote gender equality. This also enhances efficiency in policy making.
- ✓ Many Briefs address gender issues that are relevant to all policy makers, regardless of the sector in which they work. For example:
  - **Education:** Professional education is often the starting point for occupational segregation in many different sectors.
  - **Environment:** Like gender, environment is a “cross-cutting” issue that needs to be integrated into all policy areas.
  - **Governance and Participation:** Questions of gender balance and decision-making power are important in every sector.
  - **Justice and Human Rights:** Legislation is an issue for every policy sector. Furthermore, a human rights approach to gender equality is something that should be integrated into all sectors.
  - **Labour:** Ensuring equal employment opportunities and limiting occupational segregation concerns all jobs and professions, across all sectors.
  - **Macroeconomics and Trade:** Every sector is to some extent dependent on macroeconomic policies. Gender equitable budgets must be fostered at every level, in every sector.
  - **Media:** Policy makers in all sectors will need to communicate their policies through mass media. The media is also a crucial link in terms of upholding (or alternatively, challenging) gender stereotypes which lie at the root of gender-based issues in all sectors.
  - **Science, Research and ICT:** All policy makers rely on research and analysis in preparing policy. ICT plays an increasingly paramount in all sectors.

### What Geographical context do these Gender Briefs discuss?

These Gender Briefs sometimes contain some illustrations specific to Central and Eastern Europe and the CIS (e.g. post-Soviet legacy, or EU accession for some countries). At the same time, the information contained here also addresses gender issues of a global nature, so the Gender Briefs should be of interest to a wider audience as well.

### How are the Gender Briefs structured?

All of the Briefs are divided into “sub-issues”. This is because most sectors deal with a variety of issues that may have similar but nonetheless distinct gender implications.

Each substantive sub-issue discussed in the Gender Briefs is divided into sections that provide different types of information:

### What is the Issue? What is the Goal?

**The issues:** This section of the Brief describes main trends in that particular policy area, and highlights how and why these trends and issues are in fact “gender issues.”

**The goals:** This section always finishes by summarizing the main goal or goals. While goals exist at many levels, attention here is focused on the policy goal: i.e. what policy makers should be striving to achieve. Where other levels of goals or objectives are noted, this is specifically explained.

## Why Bother?

This section of the Gender Brief presents arguments for **why** policy-makers should adopt a gender mainstreaming approach in regard to the particular issue at hand. For a more detailed description of these categories of arguments, as well as for tips on how and when to use them, see PART I of this handbook: *Arguing your Case: Gender Matters!*

## Measuring Progress

This section of the Gender Briefs suggests indicators that could be used to measure progress towards your policy goals. In general, three types of indicators are suggested here:

- **Checklist indicators:** These indicators ask whether a certain mechanism, policy or perspective is or is not in place. The “measure” in this case is simply a question of “yes” or “no.”
- **Statistics-based indicators:** These are “traditional” indicators that measure changes using statistical data. While the information needed to track these indicators may be readily available, statistical-based indicators rarely provide a qualitative perspective that is often needed to measure progress in gender mainstreaming. Therefore, these indicators often need to be complemented with the other two types.
- **Indicators requiring specific forms of data collection:** These may be qualitative indicators as opposed to quantitative, and will require specific sociological surveys or other forms of data collection to be undertaken. The information provided by these indicators is often extremely useful and specific. However, in order for this data to serve its function of monitoring and evaluating, it is crucial that specific and replicable methodology is developed, so that the data collection can be repeated and compared over time.

This section also attempts to highlight the usefulness as well as the limits of each indicator (“What does it measure?” “What does it not measure?”).

See **Part I** of the Handbook: *STEP 8: Monitoring: Keeping a (Gender-Sensitive) Eye on Things* for additional information on types of indicators, sources of qualitative and quantitative data, and steps for developing indicators.

## Possible Interventions and Entry Points:

Every situation is unique – this means that activities and interventions are not always readily transferable from one country to another, or even from one community to another. However, the suggestions outlined in this section of the Gender Briefs are meant to stimulate your own ideas. Interventions that fall within the mandate of governments are accented, but cooperation with non-governmental organizations and other stakeholders is also noted, where appropriate.

## Footnotes and References:

You will note that these Gender Briefs contain brief references in footnotes, where applicable. Full references can be found at the end of Part II.

This Gender Brief examines ways to mainstream a gender perspective into macroeconomic and trade policies. Because macroeconomic policies to a large extent set the “tone”, priorities and overall direction of public policy, progress at this level will greatly assist the task of gender mainstreaming in line ministries and specific sectors.

## I. Objectives and Justification of Macroeconomic Policy

### What is the Issue? What is the Goal?

Traditionally, the goal of macroeconomic analysis has been to point out what is hindering economic growth; the goal of macroeconomic policy has been to prescribe solutions that will reverse negative trends and result in positive growth. Macroeconomists, in cooperation with governments, strive to achieve these goals by developing a conceptual framework of how markets are constituted and interact, establishing hypothetical models and testing these, and then ultimately developing and implementing policy on the basis of these conclusions.

Until very recently, social justice was not considered to be a concern for macroeconomic analysis or policy. Since “human development” has become increasingly recognized as an overarching policy goal of nations, attempts have been made to introduce a social justice dimension, including the reduction of poverty and gender inequality, into macroeconomics.

At the same time, it has been recognized that macroeconomic policy, which purports to be “gender-blind”, is not: macroeconomic policies, even if they do not address gender issues directly, nonetheless result in gender-differentiated outcomes at the meso- and micro-levels. Means of integrating gender and other social justice issues, however, require long-term investments and commitments by policymakers, and more often than not, a shift in the way macroeconomics are approached.

Social justice cannot be simply “added on” as a “bonus” to economic concerns by implementing formulaic technical exercises, as some recent examples of integration have tried to do<sup>8</sup>. Instead, the goal of macroeconomic policies needs to be transformed, whereby their soundness will be judged not by market-based criteria, but in terms of whether they ultimately succeed in promoting social justice, including gender equality.

The specific **goal** for the formulations of macroeconomic policy in general must therefore be twofold:

- first, social justice and gender equality issues must be integrated into macroeconomic policy **content**; and
- second, new macroeconomic policy **targets** must be set, whereby success will be determined by social justice criteria.

### Why Bother?

**Justice:** Economic and social rights are an integral part of many major human rights treaties<sup>9</sup>. States can only be considered to have fulfilled their internationally mandated obligations if their macroeconomic policies recognize economic and social equality, including a gender dimension, as an explicit goal.

**Efficiency:** Research reveals that greater gender equality is most often correlated with greater economic growth. Conversely, unequal social relations are an obstacle to sustainable and high rates of growth.<sup>10</sup> It thus follows that investment in gender equality and social justice issues at the macro-level will facilitate stable growth, benefiting the nation as a whole.

**Sustainability and Quality of Life:** Research shows that significant gender gaps and inequalities can persist in a country despite economic progress. This is because growth does not automatically “trickle down” equally to all segments of the population. If macroeconomic policy were to include issues of social justice and equality as an

<sup>8</sup> see Diane Elson and Nilufer Catagay (2000).

<sup>9</sup> see, for example: Universal Declaration of Human Rights, International Covenant on Economic, Social and Cultural Rights, Convention on the Elimination of All Forms of Discrimination Against Women, European Social Charter, Amsterdam Treaty.

<sup>10</sup> Elson and Catagay (2000), pg. 10.

integral dimension of its content (rather than as an “added bonus”), these inequalities could be addressed from the outset. This would result in a better quality of life for all inhabitants, rather than for a privileged few.

Moreover, macroeconomic policies that traditionally focus only on reducing budget deficits and inflation often subscribe to the myth that high growth will automatically reduce poverty and income disparities over time. However, lack of social protection leaves vulnerable groups increasingly vulnerable in times of crisis. Macroeconomic policies must include measures to guarantee some level of economic security to vulnerable groups in order to avoid catastrophic consequences during economic crises.

***The 1999 East Asian Financial Crisis :** In the aftermath this crisis, there seems to be greater agreement that the social impact of macroeconomic policies must receive increased attention, that countries must put in formal protections for vulnerable groups, that there needs to be more flexibility on the fiscal target indicators, that excessive fiscal restraint must be avoided and that public spending for basic social services for poor people must be protected or even increased during economic crises.<sup>11</sup>*

**Alliances:** Many countries have entered into development partnerships with international organizations that mandate increased attention to social justice and gender equality in macroeconomic policies.

For example, the Comprehensive Development Framework (CDF), proposed by the President of the World Bank in January 1999, makes clear that “structural, social and human aspects” must balance strictly economic development concerns, and that the human dimension must “address fundamental long-term issues of the structures, scope and substance of societal development.”<sup>12</sup> Despite poor evidence of the translation of this ideal into action thus far, this mandate should be quoted and referred to in arguments for a more gender mainstreamed approach to macroeconomic policy, especially where World Bank resources and inputs are concerned.

**Chain Reaction:** Macroeconomic policies set the tone and provide the overall framework for all other development policies in a country. Lack of attention to gender equality and social justice at the macroeconomic level sets in motion the neglect of these dimensions at the meso and micro levels.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of social justice and gender equality <i>content</i> in macroeconomic policies and policy frameworks (e.g. integration of Poverty Reduction Strategy, National Plan for Gender Equality).	National	Degree of political will to integrate social justice and gender equality into macroeconomic policy	Commitment to implementation	desk review*
Existence of social justice and gender equality <i>indicators</i> (e.g. <i>poverty level, GDI, GEM</i> <sup>13</sup> ) in macroeconomic progress reports	National	Degree to which social justice and gender equality are used to judge the soundness of macroeconomic policies	Actual attention to gender equality and social justice in policy formulation and implementation.	desk review

\* because of the qualitative nature of this indicator, specific methodology needs to be developed so that this indicator can be tracked and compared over time.

<sup>11</sup> Catagay et.al. (2000), pg. 9

<sup>12</sup> James Wolfensohn (1999) as quoted in Elson and Catagay (2000).

<sup>13</sup> GDI – Gender-based Development Index; GEM – Gender Empowerment Measure. See UNDP Human Development Report 1995.

## Possible Interventions and Entry Points:

*Given the reorientation of policy objectives that needs to take place in order to fully integrate (mainstream) social justice and gender equality issues in macroeconomic policy, individual policy makers may feel overwhelmed, or as though there is little they can do to influence this process. While complete success will require long-term commitment to a process, individual measures can be taken to support this transformation:*

- **Commission and Collect Research:** Develop a database of research, both from other countries and your own, that highlights social justice and gender impacts of macroeconomic policies from a qualitative and quantitative perspective. If no research like this exists in your country, commission it or encourage others to undertake it (development partners may be able to assist with funding). Citing this research will strengthen any arguments you make for integrating a gender perspective into macroeconomic analysis and policy.
- **Track Indicators:** Changes in economic development should be tracked and compared to changes in the socio-economic situation amongst disaggregated groups such as women and men, large families, the poor, minority groups, and combinations thereof (e.g. women-headed households). This will help you make conclusions about “for whom” macroeconomic policies are working, and can be used to formulate arguments for integrating a gender and human development perspective into macroeconomic policies.
- **Develop Indicators:** If macroeconomic policy reports do not include social justice and macroeconomic indicators (e.g. measurements of poverty, disaggregated according to gender), develop such indicators and propose their inclusion in macroeconomic reports and briefs on macroeconomic trends and developments.
- **Highlight Social and Gender Justice Concerns:** Seek out opportunities to highlight any differential impact of macroeconomic policies on women or the poor in national development plans or strategies (e.g. the Country Development Plan for EU Accession countries). Provide written comments that propose concrete language for integrating gender concerns. This will help create an official mandate that can be later referred to.
- **Gender Impact Assessment of Structural Adjustment** – Before the implementation of any structural adjustment programme (SAP), experts in the field of economics and gender should perform a so-called gender impact assessment of the likely outcomes of the SAP. This will highlight the possible negative consequences of such a programme and can be balanced against any potential positive gains to decide on the correct course of action. Similarly, if a SAP has already been implemented, a gender impact assessment of its outcomes should be undertaken for the purpose of establishing “lessons learned.”
- **Dialogue with Development Partners:** Development partners such as the UN organizations or the EU should be placing human development and social justice concerns at the top of the agenda with any meetings with high-level policymakers. In preparation for these meetings, mid-level policy-makers should dialogue with these partners, and provide data and arguments that the partners can pass on to higher levels. Specific entry points might be the development of the UNDP Country Cooperation Framework (CCF) or the Comprehensive Development Framework proposed by the World Bank.

For additional entry points, see other aspects of **Macroeconomics** below.

## II. Reproductive Work

### What is the Issue? What is the Goal?

For the purposes of economic valuation, value is synonymous with market value. This has led to a separation between **productive** work (remunerated work) and **reproductive** work (unremunerated work). Reproductive work, or activity that does not have any market value attached it *per se* – i.e. much household and community work–, remains unvalued in national accounting systems. The result is an underestimation of the total “product”

of society, and a failure to recognize and reward the contribution of those people responsible for reproductive work.

In most societies, women bear the overwhelming responsibility for reproductive work, which can include child care, care for the infirm and elderly, meal preparation, cleaning and other household tasks and community services (volunteer work). Reproductive work thus becomes a “gender issue” because much of women’s contributions do not show up in **national income accounting**, creating either the false impression that women are not as economically active (when they are), or that male and female economic activity is equal (when in fact women are doing as much as half of the productive work, plus most of the reproductive work).

Reproductive work is an important consideration for macroeconomic policy and analysis not only in terms of national income accounting, but also in terms of **structural adjustment** or other major policies that hope to stimulate growth. When reproductive work is not recognized, the burdens that are placed on the reproductive sector due to macroeconomic policy reorientation are not taken into account. This in term can lead to dramatically increased hardship at the micro level. For example, cut-backs in the area of social services or the introduction of fees for social services both mean that the burden will be shifted to the reproductive sector to care for the sick or elderly. This increases the contribution of reproductive labourers, but fails to reward or recognize this contribution. For those shouldering these responsibilities, this also restricts the options and potential for activity and earnings in the productive sector. The end result may likely be decreased overall efficiency.

A problem arises, however, when attempting to attach **value** to reproductive work, for much of its significance can not be measured in market terms.<sup>14</sup> While it may be possible to attribute market value to some by-products of reproductive work (meals made, dishes washed, diapers changed), the human value of social relationships and time spent with family, for example, has no price tag. At the same time, however, its value must be explicitly recognized.

The **goal** of policy makers should thus be twofold:

- to **recognize** the enormous significance – economic and otherwise - of unpaid reproductive work; and
- to **reflect** this in policy analysis and development.

## Why Bother?

**Justice and Quality of Life** – The “male-breadwinner bias”<sup>15</sup>, which assumes a norm of male, full-time, life-long working-age participation in the market-based labour force, ignores the contribution of those in the reproductive sector. As a result, legislation and policies concerning entitlement to income and social benefits often position reproductive sector labourers as “dependants” upon productive sector labourers. This often disadvantages women and is a violation of the right to equal entitlements based on equal contributions.

Furthermore, this can lead to inequalities between men and women at the micro-level, and in particular to an increase in poverty of female-headed households. If reproductive work were adequately valued and rewarded, the quality of life for reproductive labourers and their children would increase.

**Credibility** – Put simply, work is work. Both reproductive and productive labour requires investments of time and energy on behalf of the labourer; both perform a vital socio-economic function. Macroeconomic policies that do not take reproductive labour into consideration are inevitably flawed as a major contribution to national income accounts remains invisible and unaccounted for.

**Efficiency** – The invisibility of reproductive work may hide greater inefficiency overall.<sup>16</sup> Unless some mechanism is developed which can make reproductive work visible and quantify it to some degree (in terms of hours spent, for example), the impact of macroeconomic policy on the reproductive work burden can not be measured. Without this measurement, ultimately inefficient policy choices will be made.

<sup>14</sup> UNDP Human Development Report, 1995.

<sup>15</sup> see Elson and Catagay (2000) pg. 16

<sup>16</sup> N. Catagay. “Engendering Macroeconomics and Macroeconomic Policies.” UNDP, 1998. pg. 9

**Who Pays for Health?:** Diane Elson (1995) points out that attempts to streamline the health care system have at times introduced user fees. A gender-blind perspective suggests that this should lead to shorter hospital stays and thus savings of public funds. However, user fees mean that sick people will spend a longer time at home recovering, where carers (usually women) will look after the sick instead of participating in the paid labour market. The end result may in fact be less efficient for the economy as a whole.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of hours spent on both productive and reproductive work	National	Time-based contribution of men and women to national product	The human value of unpaid reproductive work	Time-use and labour market surveys
Male:female ratio of economic output, according to market-value estimates, for both productive and reproductive work	National	Monetized contribution of men and women to national product	The human value of unpaid reproductive work	National income accounting system plus satellite accounting system estimates (see Entry Points below)

## Possible Interventions and Entry Points

- **Time-Use and Labour Force Surveys** – In order to gain a complete picture of the contributions of men and women to human development, labour force surveys must incorporate all economic time use by men and women, including non-remunerated, reproductive labour. These surveys should also include questions on the simultaneous performance of tasks and the intensity of labour. This first step is important in terms of making reproductive labour *visible*. Government white papers or concept papers should be then prepared that outline and explain the significant contribution of reproductive labourers. Once these contributions are made visible and understood, they can be taken into account in other policy making.
- **Creation of Satellite Accounts** – In order to explicitly recognize the contribution of reproductive labour, some countries have estimated the market value of this work (were it to be treated as market transactions at the prevailing wages) and reflected it in a satellite account, attached to the national accounting system. While the human value of such work cannot be reflected in such an account, quantifying such work can help make it visible, especially if a human dimension has not yet been integrated into macroeconomic policy-making and analysis.
- **Review of Legislation and Policies Regarding Income and Entitlement to Wealth:** Any policies or laws that stipulate entitlements to income (such as laws governing property and inheritance rights, those governing access to credit based on collateral and those stipulating direct entitlement to social security benefits, tax incentives for child care and divorce settlements) must be reviewed. Non-monetized contributions in the form of reproductive work must be recognized and adequately rewarded.
- **Incentives and Investments for Sharing Reproductive Work:** Policies that encourage more equal sharing of reproductive work (paternity leave, state-sponsored child care, tax incentives for child care, family-friendly workplace policies) not only make the necessity and significance of reproductive work more visible; they also make explicit the need for men to be involved in reproductive labour as well (see also LABOUR gender brief).

### III. Budgets

#### What is the Issue? What is the Goal?

The way in which governments generate funds and allocate resources ultimately affects the welfare of individual members of the population and well as the development of the nation as a whole. **Budgets serve several central economic and social functions:** they allocate resources, provide basic social services, balance income and wealth disparities, stabilize prices and generate economic growth and employment. They reflect the priorities and values of the government, and the choices people in power make to realize their social and economic agenda.

It is thus possible to assess government priorities and commitment to social aims, including gender equality, through **scrutiny of the generation and use of public resources** – at national, district and local levels. *A socially equitable budget is a crucial prerequisite for attaining social justice and gender equality.*

However, budgeting often takes place in a very non-transparent, non-participatory manner. The majority of ordinary citizens, including women, have no voice in determining how budgets are made, and even many elected representatives have limited influence on this process. This is because budgets are often considered a highly technical subject “best left to experts” – but this ignores the immensely significant social dimension of budgets. It cannot be said that making choices about the social development of a nation is something only for “experts.”<sup>17</sup>

In regards to budgeting, the **goal** of gender mainstreaming is two-fold:

- First, **engendering participation and democratization** of the budgeting process, whereby the formulation of budgets includes voices of both women and men;
- Second, ensuring that the **content of budgets reflects gender equality and social justice goals**, allocating funds and generating income in ways that are socially and gender equitable.

Progress towards both of these goals can be accomplished through the implementation of “budget initiatives”. While many types of budget initiative exist, their common goal is to **reveal** and **reshape** the way public funds are generated and spent (see **Possible Interventions and Entry Points** for further details).

#### Why Bother?

**Justice:** Budgets use public funds. Therefore, the prioritization of public expenditures and collection of revenue must occur in a socially and gender equitable manner. Ordinary citizens have the right to know how public funds are spent and collected, as well as the right to have their needs reflected in budgetary decision-making processes.

**Accountability:** The development and implementation of sound human development policies is often hampered by closed, inaccessible processes of budget allocation. Budget exercises can introduce accountability and transparency into macroeconomics, because government “promises” to allocate funds and deliver services can be scrutinized against actual expenditures.

**Credibility:** Budgets that are “gender neutral” tend to be “gender blind”. In other words, they do not take into account their differential impact on men and women (gender audits of national budgets have shown that budgets do indeed affect men and women differently). A national budget that does not recognize a gender dimension is flawed, because it remains blind to the real needs of the population it purports to serve. Budgetary decision-making must become gender-aware in order to be credible.

**Efficiency:** A gender-aware budget is a more efficient budget, as public expenditures are more precisely targeted.

<sup>17</sup> these paragraphs have been adapted from Catagay, Keklik, Lal and Lang, (2000), pg. 12.

**Sustainability:** More transparency in budgeting processes and use of public funds means that tax payers will be more willing to increase their contributions, which means increased sustainability of government-funded services.

**Quality of Life:** All budgets have effects at the micro-level. Gender-aware and socially equitable budgets mean a better quality of life for all members of the population.

**Alliances:** External development partners are more willing to provide financial support to governments if public funds are managed in a transparent and accountable manner.

**Chain Reaction:** Budgets, as a part of macroeconomic policy, reflect the values and priorities of those who formulate them. They critically impact health, education, social services and social security, job creation and economic growth.

While financial resources cannot resolve all gender equality issues, they are an inalienable part of the solution. Global assessments have noted that the lack of adequate budgets and explicit targets for social programmes in general, as well as insufficient allocation of financial and technical resources for gender mainstreaming specifically, have been important factors hindering the implementation of globally agreed plans of action for social and gender justice.<sup>18</sup>

## Measuring Success

*Budget initiatives<sup>19</sup> generate a wealth of data that can help measure social and gender justice aspects of budgeting. Some basic, but not exhaustive, indicators include:*

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Level of public expenditure specifically targeted at enhancing gender equality	National (can also be conducted at regional and district level)	% of public funds that go specifically towards gender equality	“Mainstreamed” expenditures will not be measured here, although they may target gender equality	Budget initiative
Sex-disaggregated impact of general expenditures	National (can also be conducted at regional and district level)	Who benefits from public funds, disaggregated according to gender		Budget initiative
Number and name of groups and individuals providing direct input into budget formulation	National (can also be conducted at regional and district level)	Degree of participation in budget-formulating processes	Degree to which input is taken into account by budget committee	Minutes from budget committee meetings

### Aggregate

## Possible Interventions and Entry Points

- **Budget Initiatives<sup>20</sup>:** Gender budget initiatives are policies or actions that contain an explicit focus on national or local level public expenditures and/or revenues from a gender perspective to constitute a budget exercise. Initiatives will be one of two types:

<sup>18</sup> Catagay et. al. (2000), pg. 5

<sup>19</sup> see Possible Interventions and Entry Points below

<sup>20</sup> adapted from Catagay et. al. (2000). For more information on practical implementation of budget initiatives, see also Adelstal (1998) and Budlender et. al. (1998),

*Ex-post* – A gender-based analysis of current budgets. These budget initiatives seek to “**reveal**”;

*Ex-ante* – Mainstreaming a gender perspective into the budget formulation process. These initiatives seek to “**reshape**.”

More specifically, initiatives might differ according to the following elements:

- **Guiding principle** – Is the initiative guided by a gender equality mandate, a pro-poor mandate, both or something else?
- **Focus** - Does the initiative look at expenditures, revenues, or both?
- **Outputs** – Will the initiative produce an impact analysis, alternative budget, proposals and recommendations, other outputs?
- **Scope** – Does the initiative take on and challenge the budget, governance framework, or macroeconomic policies more broadly?
- **Process** – How participatory is the process?
- **Actors and institutions** – Is the initiative led by governmental, non-governmental actors or both jointly? Which groups are specifically involved? External partners?
- **Methods and tools** – Are tools highly technical? Participatory? Do they encourage social dialogue?

Moreover, budget initiatives may take place at any level:

**National Budgets** – Initiatives at this level are crucial in terms of democratizing macroeconomic policies and analyzing the social dimension of national priorities. National level initiatives are also often most difficult, due to the non-transparent nature of some budget formulation processes.

**Ministerial or Departmental Budgets** - Australia and South Africa, for example, have implemented gender budgets exercises whereby ministries were asked to report on their resource allocation and revenue collection (programmes and expenditures specifically targeted at gender issues, equal employment opportunity expenditures, gender impact of general expenditures, taxation according to base). *This is an important entry point for mainstreaming at the sectoral level.*

**District or Local** – In the context of decentralization, budget initiatives are particularly helpful for introducing transparency and accountability into decentralized expenditure and revenue collection processes.

Overall, budget initiatives that have already been undertaken have succeeded in accomplishing the following objectives:

- **public awareness raising** on gender equality by sparking dialogue on this issue;
- **increased capacity** and knowledge base of the citizenry on issues related to budget through participatory processes;
- demonstration of how public budgets can be made responsive to the needs of both genders by **incorporating their interests and voices** into budgetary decision-making;
- at times, **more effective revenue collection and use of funds** and **reduction in corruption** by improving transparency and accountability in public finance.

**GENDER & BUDGET TOOLS: DIANE ELSON HAS ELABORATED SIX DIFFERENT TOOLS FOR INTEGRATING GENDER ISSUES INTO AN ASSESSMENT OF PUBLIC EXPENDITURE:**

1. **Gender-disaggregated beneficiary assessment of services delivered and budget priorities:** assesses the views of men and women as potential beneficiaries of public expenditure.
2. **Gender-disaggregated public expenditure benefit and incidence analysis:** analyses the extent to which men and women, girls and boys, benefit from expenditure on publicly provided services.
3. **Gender-aware policy evaluation of public expenditure by sector:** evaluates policies that underlie budget appropriations in terms of their likely impact on men and women.

4. **Gender-aware budget (expenditure) statement:** shows the expected implications of the Expenditure Estimates, in total and by Ministry, for gender equality.
5. **Gender-disaggregated analysis of impact of budget on time-use:** makes visible the implications of national budget for household time budgets, thus revealing macroeconomic implications of unpaid work.
6. **Gender-aware medium term macroeconomic policy framework:** Uses macroeconomic modelling to produce a gender-aware medium term macroeconomic framework.

*For more detailed methodology, consult Annex 3 “Integrating Gender Issues into Public Expenditure: Six Tools” of Workshop on Mainstreaming a Gender Equality Perspective into Government Budgets, compiled by Charlotta Adelstal, SIDA, 1998.*

#### IV. Trade Liberalization

### What is the Issue? What is the Goal?

In the first place it is important to recognize that trade liberalization does not present a foregone conclusion in favour of social and economic development: in other words, trade policies may or may not support the human development of a nation; trade policies may or may not exacerbate gender inequalities.

Trade policy-making needs to be approached from a gender perspective in a number of contexts:

**Shifting the burden of social reproduction<sup>21</sup>:** Free trade policies usually mean that tariffs and licensing fees will be either reduced or eliminated, which means a decrease in government revenue is likely to follow. Governments must therefore look for ways to make up for lost revenue – usually by increasing domestic taxes or by spending less. Social policies are often first in line for cut-backs. This means that the social burden is most often shifted to women in the face of such cut-backs (to care for children, to care for the sick and elderly – either in addition to or at the expense of paid employment). This can be a major set-back for gender equality.

**Protection of the domestic labour force:** International trade agreements may challenge national legislation and policy that protects social and economic rights of the domestic labour force. When such legislation is circumvented (or even ignored) in “export processing zones”, or when governments weaken their own legislation to bring it in line with international trade agreements, men and women are affected in different ways. This is because there is often a high degree of gender segregation within the labour force, and “export processing zones” often rely heavily on cheap female labour.

**“Fair Trade,” or Social Responsibilities Of States Engaging In Trade Relations With Other Countries:** Some trade processes rely on exploitation of cheap labour from least developed countries. This labour is often done by women. Such trade practices keep women trapped in export processing zones and in marginal occupation, limiting their opportunities to enhance their skills and move on to better quality employment. Furthermore, trade liberalization may weaken workers’ bargaining power over wages and benefits.

**Benefits of Foreign Direct Investments:** Trade liberalization is also likely to bring increases in foreign direct investments (FDI) and thus benefits in terms of modernization of working practices and new technologies. However, these benefits are not guaranteed, nor are their equal distribution between men and women. Such advances and improvements may in fact increase gender inequality.

<sup>21</sup> WIDE Resources on Gender and Trade

At the same time, trade liberalization can also bring great benefits, both in terms of growth and gender equality. It must be realized that trade policies, like other macroeconomic policies, are a tool that must be used appropriately in order to yield results that benefit all individuals in a country.

The **goal** in terms of trade policy and gender mainstreaming is therefore:

- Ensuring that the **gendered impact** (a) on the workforce, and (b) on those responsible for reproductive work, is addressed in the development and implementation of trade policy.

## Why Bother?

**Justice:** Promotion of equal benefits from economic growth and technological advances is a human rights imperative, and states thus have an obligation to ensure attention to gender equality in trade policy and practice.

**Credibility:** States engaging in trade with developing countries are often the most outspoken opponents of human rights violations (which they often point to in developing countries). However, unless these same states ensure protection of gender equality in their trade practices, they seriously damage their credibility as promoters of human rights.

**Efficiency:** While trade policies can stimulate growth and may very well lead to short term gains in export-led sectors, unless these short-term benefits are harnessed to avoid long-term costs (particularly social and gender costs), growth can backfire. Because sustainable social and economic development is closely linked to gender equality, trade policies must be careful not to shift the burden of reproductive work from the state increasingly on to women, or to exacerbate inequalities within the labour force, as the ultimate costs will override the short-term gains.

**Quality of Life:** Poorly planned trade policies that do not adopt a gender perspective can seriously worsen the quality of life of those working in export-led sectors and export processing zones. This can have further negative impact in terms of efficiency (see above).

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of top level decision-makers in trade and macroeconomy sectors	national	Gender balance in terms of access to decision-making in the trade sector	The commitment to or understanding of gender implications of trade policy by either men or women in these positions.	Survey

## Possible Interventions and Entry Points

- **Monitoring the gendered impact of trade liberalization policies through the development of baseline statistical data:** Research should be commissioned or undertaken in-house to establish and monitor any links between trade policies and growing gender inequalities. This could focus on employment conditions in trade-oriented sectors, as well as on increasing social burden (time and other resources spent on reproductive labour), disaggregated by gender. This will provide the necessary information for evaluating the social justice and gender equality effects of trade policies.

- **Monitor enforcement of pro-gender equality legislation:** Policy-makers should try to ensure the incorporation of national equal opportunities and non-discrimination laws into trade policy and trade agreements; and if no such laws exist in a country, governments should ensure that multinational corporations apply internationally agreed standards (or better) in this area.<sup>22</sup>
- **Apply gender perspective to technical assistance:** Governments and multi-lateral institutions that provide technical assistance to other countries should ensure that this assistance is gender sensitive and promotes the upgrading of technology and skills for both women and men.<sup>23</sup>
- **Encourage a gender perspective in foreign direct investment (FDI):** Similarly, governments should encourage investors to invest equally in skills-building and opportunities enhancement for both men and women. While governments may not be able to regulate this, the example they set and the message they send to investors about the state's social justice commitments is an important assertion of political will.

## GOVERNANCE AND PARTICIPATION

*Governance can be defined as “the exercise of economic, political and administrative authority to manage a country’s affairs at all levels.”<sup>24</sup> It is manifest in the mechanisms, processes and institutions through which decisions are negotiated and implemented. Gender balanced participation in governance processes not only refers to the physical presence of men and women “around the decision-making table”, but also to the quality of participation, i.e. meaningful engagement which stems from a mutual respect for diverse opinions and standpoints.*

*As this Brief highlights, governance refers not only to formal public decision-making structures and processes (i.e. national and local government), but includes decision-making within the family, community and private sector as well. Mainstreaming a “gender perspective” into governance thus entails addressing the ways in which both genders participate in and are affected by various systems of governance, as well as the interaction between these various systems.*

LINK: Some of the most fundamental political instruments are public budgets, and both budgets and governance are questions of accountability. This is why budget making processes and policies should also be analyzed from a gender and governance perspective. For further information see the Gender Brief on MACROECONOMICS, particularly part III: BUDGETS.

### I. Governance and Participation at the National Level

#### What is the Issue? What is the Goal?

A gendered analysis of governance immediately highlights the issue of **participation and representation**. A presumed “commonality of interests” between men and women, as well as their needs and perspectives, has often been used to legitimize an overwhelming presence of men in formal governance structures at the national level – i.e. parliament and government (or Cabinet of Ministers).

However, a gender analysis of political processes and policies reveals that men and women do not always share the same needs and perspectives, and that it is thus crucial that women be represented as well, so that their interests – as half of the population – are adequately addressed. Thus once this “commonality of interests” is challenged, a mandate emerges for more balanced participation of men and women, to ensure that both genders participate in the decisions and actions that affect them.

At the same time, it is crucial that to understand that more balanced participation will not come about simply from a formal mandate or invitation to women. The systemic barriers that often keep women out of major public governance structures are profound, and must be addressed before any serious progress can be made.

<sup>22</sup> WIDE Resources on Gender and Trade

<sup>23</sup> WIDE Resources on Gender and Trade

<sup>24</sup> UNDP, “Women’s Political Participation and Good Governance: 21<sup>st</sup> Century Challenges,” pg. iii.

**BARRIERS TO FEMALE PARTICIPATION IN GOVERNANCE STRUCTURES\***

1. General attitudes and culture in society which construe men as the only real political actors, tend to legitimate men and their actions, while disqualifying women. In the same sense, women in politics are often more closely scrutinised and criticized than men.
2. The assumption of a commonality of interests between men and women often negates the need to represent women as a social group. While “women” are by no means a coherent, internally identical group, they do share some common needs and interests which require representation.
3. The lack of a written and citable political commitment to social and gender equality and justice (i.e. National Plan of Action or other policy document) makes it difficult to hold governance structures accountable for low female participation.
4. Women can be discouraged and intimidated by the use of masculine terminology in politics and governance, either under the flawed assumption that men are the only legitimate actors here, or that masculine terminology can also include and represent women – which it does not.
5. A lack of media representation of women’s political voices, views, demands and leadership, means that other women lack a model with which they can identify and find legitimacy for their own views.
6. The masculine culture of politics, including the “old boys network” of patronage and connections and the pervasiveness of after-hours get-togethers (e.g. on the basketball court, in the sauna) to reach agreements on political questions keeps women out of many informal yet integral aspects of decision-making.
7. The unequal division of family responsibilities, including household management and childcare, places women at a disadvantage in terms of time needed to be active in politics. Similarly, limited social services inhibit women’s access to “disposable time”.
8. Women’s lower wages and limited entitlements to social benefits, alongside prevalent social expectations that women spend their income on their families, inhibits or prevents expenditure on an uncertain political career.
9. Public and private forms of violence exercised by men against women curbs and controls women’s self-determination and risk-taking behaviour.

\* This list was compiled based upon G. Ashworth’s list in [Gendered Governance: An Agenda for Change](#), pg. 11.

As mentioned above, the objective of more balanced participation in national governing structures is less an end in itself than a means towards **improved quality of governance** – increased participation of women should help foster gender-awareness in political processes and policy practice. At the same time, we need to remember that a critical understanding of gender issues does not come naturally to professionals, whether women or men.<sup>25</sup> Therefore, real change in how a government approaches gender requires attention to three issues:

- (a) **Critical mass:** In order for a group with common interests (in this case, women) to be heard and taken into account, it has been proven that a presence of not less than 30% is necessary.

<sup>25</sup> J. Beall, pg. 4

- (b) **Capacity Building:** Because gender-based planning is not something anybody is competent at instinctively, training and capacity-building are essential – for both women and men (See *Possible Strategies and Entry Points* below).
- (c) **National Machinery:** Various institutions or bodies at the national level that support the integration of a gender perspective are necessary in order to guarantee effective planning and implementation. National action plans or policies provide the official mandate for action, and can be used to measure progress and evaluate results. (See *Possible Strategies and Entry Points* below).

The **goal** of mainstreaming a gender perspective into issues of governance and participation at the national level is therefore two-fold:

- to ensure **balanced participation** between men and women in national governance, which includes **removal of structural and systemic barriers** to women’s participation;
- to ensure that **gender issues** are **integrated** into decision-making, implementation, monitoring and evaluation of national governance initiatives.

LINK: See PART I: 12 STEPS FOR GENDER MAINSTREAMING for a detailed analysis of how to mainstream gender in the policy-making process.

## Why Bother?

“... [U]ntil gender parity is reached in governance, women cannot reach full equality with men in any sphere. The absence of women’s voices in shaping the most fundamental political instruments ... has ensured the preservation of gender inequity even with regard to women’s health and security in their own homes.”<sup>26</sup>

**Justice:** In the case where one gender (most often women) is barred or deterred from holding public office because of either direct discrimination or systemic barriers, participation becomes an issue of justice. As all citizens of a society have a right to political participation, it is a state’s duty to ensure that both women and men are fully able to enjoy and exercise this right.

**Credibility and Accountability:** Gender-balanced representation is also a question of credibility and legitimacy of government structures. Because women represent at least half of the population, their presence in governance structure lends legitimacy to that structure: “When democratic processes prevail, women in public office give meaning to the representative nature of democracy and institutionalize and legitimize women’s voices in the sites of power.”<sup>27</sup> Furthermore, populations have greater trust in governments that are transparent and represent the interests of the entire population.

Recent data analyzed by the World Bank has also revealed that more women in government may lead to more honest governance: gender-differentiated attitudes towards corruption appear to be a worldwide phenomenon.<sup>28</sup>

**Efficiency:** Research carried out by the UN<sup>29</sup> on governance issues revealed that men elected to executive and legislative branches of government are largely unaware of household needs and the ways in which these relate to socio-economic development at the community, local, provincial and national levels. The absence of this perspective means that policies are not as efficient and effective as they could be (see *Why Bother?* in **MACROECONOMICS** Gender Brief for further information.)

Moreover, if talented and qualified members of the population (in this case, women) perceive insurmountable and non-objective barriers to their career goals in politics, they are likely to leave the country in search of

<sup>26</sup> UNDP, “Women’s Political Participation and Good Governance: 21<sup>st</sup> Century Challenges” pg. 2

<sup>27</sup> J. Beall, pg. 9

<sup>28</sup> World Bank Consultative Draft, pg. 37.

<sup>29</sup> see UN Research Institute on Social Development “Technical Cooperation and Women’s Lives: Integrating Gender into Development Policy” www.unrisd.org

opportunities elsewhere, such as Europe and North America. This “brain drain” detracts from the full economic and social development potential of a country.

**Chain Reaction:** It is also important to realize that women in decision-making positions serve as important role models, which will inspire other women to stand for and hold public office.<sup>30</sup>

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
1	2	3	4	5
Male:female ratio of members of parliament	National	Gender balance in legislative branch of national government	Whether women in parliament have the capacity and will to represent women's interests and needs.	Parliament
Male:female ratio within political parties, including: - party leaders - general membership	National	Gender balance within political parties. This can be an indication of how “attractive” politics are to women. Differences between parties may be a reflection of the extent to which parties promote advancement of women.	Actual attention to gender issues in the party's political platform.	Political parties
Male:female ratio of member of government (Cabinet of Ministers)	National	Gender balance in politically appointed executive branch of government.	Whether women in government have the capacity and will to represent women's interests and needs.	Government
Male: female ratio in the civil service, including: - top managerial positions - other positions	National, Ministerial. It is useful to compare differences in gender balance between the two levels.	Gender balance in civil service.	Level of capacity of both men and women to integrate gender issues.	Civil service office
Existence of an official policy mandate for gender equality, including a mandate for equal representation and participation	National	Existence of political will to treat gender equity in governance and participation as a significant policy issue	How well and to what degree the given policy is implemented	Policy review

<sup>30</sup> J. Beall, pg. 9

1	2	3	4	5
% of national government expenditure targeted at gender mainstreaming and gender equality initiatives.	National	Financial commitment to attaining policy goals on gender equality.	It is important to note that some important signs of commitment (such as public affirmation by government officials of the importance of gender) do not require large expenditures.	Local budget review

## Possible Interventions and Entry Points

- **Using research to define and refine the problem:** Given the diversity of factors that may hinder women's full participation in national governance structures, it is important to carefully identify the barriers in your particular national context. Sociological surveys on attitudes towards female politicians (of both the electorate and politicians themselves), as well as detailed analysis of the structures and processes of politics (i.e. how ministers are appointed, what informal networks of decision-making exist, how politicians are promoted within their own political parties, etc.) are invaluable resources for pinpointing the source of the problem. Once the problem is precisely identified, concrete steps may be taken to resolve it.
- **Civil service reform:** One important entry point for the integration of a gender perspective is civil service reform – currently taking place in a great number of countries around the world. Civil service codes can include explicit non-discrimination and/or affirmative action principles, while civil service training can incorporate gender issues and concerns.
- **Setting Concrete Targets for Gender-balanced participation:** As experience has shown, without concrete, time-bound goals, governments cannot be held accountable, and sustainability of progress is less likely. Governments should therefore include a time-bound target (e.g. not more than 60% of government positions and parliament seats to be held by either men or women by 2010) in an official declaration of priorities or strategy for action.
- **Short-term statutory provisions for affirmative action, or quotas:** Because of the many diverse barriers that women face in entering governance structures, set quotas may be necessary to give female participation a boost. This is also known as positive discrimination or affirmative action. However, because there is often backlash against such measures, it is vital that implementation of quotas be accompanied by public awareness campaigns to explain why it may be necessary.
- **Fostering a gender-neutral and woman-friendly governance environment:** This may include expanding child-care facilities and parental support to allow women (and men) to balance their roles as parents and politicians. The experience in Sweden suggests that such measures can be particularly instrumental in bringing more women into public office.<sup>31</sup>
- **Establishment of a “Women’s Caucus”:** Many countries around the world have established multi-party, non-partisan women's caucuses or coalitions, where female parliamentarians can meet to discuss issues of particular concern to them and to articulate positions on various issues. This “united front” has often been instrumental in bringing policy changes for the promotion of gender equality that may not have been possible without a coalitionary approach.<sup>32</sup>
- **Establishment and Strengthening of National Machinery for Gender Equality:** This may include a Ministry (or department) on gender or women's affairs, a National Institution for Gender Issues, an Office

<sup>31</sup> J. Beall, pg. 10.

<sup>32</sup> See for example Mukiibi, “Alliances for Gender and Politics: The Uganda Woman's Caucus”.

for Gender Equality attached to either the Prime Minister's or President's Office, or a special ministerial portfolio on Gender Issues. The precise type and mandate of machinery must be dictated by national needs and context.

- **Establishment of an inter-ministerial Gender Working Group:** Because gender is a cross-sectoral issue that needs to be mainstreamed into all areas of policy, an inter-ministerial working group can be instrumental in ensuring the practical implementation of policy mandates. This also helps avoid the problem of "marginalization" of gender as a "special issue" left only to the experts (or women). Working groups also facilitate information sharing and capacity building.
- **Establishment of a Consultative Committee on Gender Issues:** Because governance structures often lack necessary expertise on gender issues to make important policy and legislation decisions, a useful practice is the convening of a consultative group or committee that can advise politicians and policy makers. Members might include NGO activists and experts, although the main criteria should be the level of their gender expertise. Meetings can be held either on a regular basis with a changing agenda, or may be convened in response to specific, current policy questions. Such a committee is also an excellent way to promote more accountable and participatory governance.
- **Preparation of an Annual Report on Gender:** The preparation of such a report by the government can be an important source of statistical information and a tool for tracking progress and disseminating information to a wide audience. Such a report can either be prepared "in-house" by the national gender machinery, or can be sub-contracted to a research organization or NGO.
- **Establishment of a Gender Policy Resource Centre:** Creating a central "clearing house" for reports, bulletins, books and other information on gender policy can make gender mainstreaming more efficient and can contribute to strengthening the profile of gender issues within governance at the national level.
- **Example-setting:** Women who have already succeeded in establishing themselves in political positions can be extremely influential internationally and nationally in encouraging other women to enter politics. Opportunities should be sought, either formally or informally, for these women to speak to other women and girls – in the media, at schools or at other events.
- **Training Strategies for Increasing Women's Political Participation:** Low women's political participation at the national level is more often an issue of systemic barriers than women's lack of capacity. At the same time, because women have often not had the same opportunities as men to hold political office, women's disadvantage can be countered by providing training (to female candidates and women more generally) in areas such as<sup>33</sup>:
  - capacity-building through networking
  - negotiation skills
  - management
  - budget analysis
  - constituency-building and mass mobilization
  - gender mainstreaming in politics and policies
  - use of mass media
  - political and voter education
  - long-term strategies for engaging the younger generation

*At the same time, it should be recognized that many male politicians require training in these same areas – particularly in terms of integrating a social and gender justice perspective into politics. It is thus crucial to involve potential and current male politicians in such training as well – not only will this increase their capacity, but will create a more favourable and welcoming governance environment for women. Involving men will also encourage broader discussion and debate on issues specifically affecting men.*

<sup>33</sup> list adapted from L. Hamadeh-Banerjee, 2000, pg. 12

### GENDER AND CORRUPTION

*In the shadow of good governance stands corruption: a globally pervasive phenomenon whereby public officials use their position either for direct personal gain, or to assert influence beyond their given mandate. Corruption – which is found to a greater or lesser extent in all governments worldwide – can be devastating for the progress of a nation.*

*Corruption is a question of accountability; corruption is also a gender issue. A recent study by the World Bank<sup>34</sup> suggested that increased participation of women in government could be “particularly effective in promoting honest government”, as a strong correlation was found between high levels of women in parliament and lower levels of corruption.*

*While it may be disingenuous to suggest that women are naturally “more honest” or “less corrupt” than men, their increasing presence into government over the last several decades in many countries has undoubtedly brought more attention to accountability and social justice. At the same time, it should be noted that a critical mass (i.e. at least 30%) of women is required to instigate substantial change.*

## What is the Issue? What is the Goal?

### II. Local Governance: Decentralization, Community Planning And Service Provision

Many local government issues overlap with issues discussed in the previous section on governance at the national level. However, certain aspects and issues are specific to local government in terms of gender mainstreaming.

The issue of **decentralization** is one of these aspects. Ideally, decentralization will bring a transfer of resources and devolution of decision-making power regarding issues and areas closest to and best dealt with by local government. This means that local governments need to be particularly **responsive** to the actual needs of the community – which inherently means attention to the particular needs of both men and women at the community level.

On the one hand, this highlights the importance of **gender-balanced representation** in official local government structures. General trends around the world tend to show a higher proportion of female representation in local government councils than in national government, although in few places has gender balance actually been achieved.

On the other hand, this highlights the need for **participatory mechanisms**, i.e. the need for local governance structures to involve both men and women from the wider community in decision-making and policy-making processes, so that both women’s and men’s knowledge can inform these decisions and policies.

Management of **community services and resources** is of particular importance here:

- **Social, Health and Education Services:** Because women are often responsible for caring for children, the sick and the elderly, they often possess unique knowledge about the most efficient and effective ways of providing social and health care services. This knowledge needs to be understood and considered in the formulation of policies.

At the same time, because health and education are often considered “women’s business”, the needs and perspectives of men in the community may not be adequately considered by policy-makers. Bringing community men into this loop of participatory decision-making and understanding their needs and perspectives might also encourage more male involvement in areas of life connected to social reproduction.

- **Planning, Housing and Transportation:** These services have strong gender dimensions. The rising number of female-headed households in both so-called industrialized and developing countries,

<sup>34</sup> Dollar, Fisman and Gatto, 1999.

combined with the fact that women are generally more active in informal community management, means that women's needs and knowledge must be taken into consideration when making decisions on house design, zoning and site lay-out.<sup>35</sup>

Similarly, because women are often responsible for household management, they have specific needs and unique knowledge when it comes to waste removal, energy, water supplies and other community services.

Furthermore, men and women often have different transportation needs: while men will more often have use of a "family car", women tend to rely much more heavily on public transport. Furthermore, women often require public transportation at non-peak hours for the completion of parenting and household-related chores. Transportation planning needs to take these issues into consideration.

The **goal** is therefore two-fold:

- to ensure **balanced participation** between men and women in local governance, which includes **removal of structural and systemic barriers** to women's participation
- to ensure that a **gender issues** are **integrated** into decision-making, implementation, monitoring and evaluation of local governance initiatives.

## Why Bother?

**Justice:** Equal access to political decision-making for community service and resource management is a human rights issue. Barriers to equal participation on the basis of gender need to be removed because they are in violation of human rights obligations to promote equal opportunities for all.

**Accountability:** Accountability is a two-fold issue for local governments: Local governments are in a very direct way accountable in front of their constituencies, but are equally accountable to central government because of the resources delegated by authorities. Because accountability inherently implies transparency and responsiveness to actual needs, enhancing accountability of local governance can also promote gender equality, and vice versa. Means to do this include budget initiatives, public hearings and consultative/participatory mechanisms (See **Possible Interventions and Entry Points** below).

Furthermore, the International Association of Local Authorities (IULA), for example, has set the goal of not more than 60% of either gender to be represented in local assemblies. Local governments that are unwilling to commit themselves to this same goal should be held accountable by their constituencies: why are local governments so reluctant?

**Efficiency:** *"Women, as prime users of housing and human settlements, often have insights which can improve design and prevent failure and wastage." For example, while a grid lay-out for housing may be the simplest to design, women in informal settlements may prefer a more communal, circular pattern which allows for collective child-minding, greater sociability and security and reduced isolation.<sup>36</sup> While this knowledge stems from women's experience, such designs are also likely to encourage men to make greater responsibility for social reproduction activities.*

**Quality of Life:** Actions of local government affect the quality of life of community members in a very direct manner. If the unique knowledge of both women and men in terms of community planning is explicitly recognized, this could greatly improve the quality of life of all members living in the community, and could ease the reproductive burden of women.

**Chain Reaction:** Participatory and "gendered" local governance often means strong alliances with community-based organizations – many of which are led by women. It is important to point out that this is an important way for women to gain skills in public sector governance – community work is a common catalyst for women entering politics. Such hands-on, community experience adds value to the work of anybody serving in public office.

<sup>35</sup> J. Beall, pg. 19

<sup>36</sup> J. Beall, pg. 19-20.

### DECENTRALIZATION: IMPLEMENTATION AND ACCOUNTABILITY FOR GENDER MAINSTREAMING

In the context of increasing decentralization of power, accountability is a key concern.

Successful decentralization requires four conditions:

- Local financing and fiscal authorities must be linked to the service provision responsibilities of local government;
- The local community must be informed about the costs of services and delivery options to make meaningful decisions;
- The community must be able to express views that are binding to policy makers;
- A system of accountability must be put in place which relies on public and transparent information for the community to be able to monitor the effectiveness of local government and for policies to be responsive;
- A system of accountability must be put in place whereby national authorities can monitor the effectiveness of implementation or follow-up by local authorities on decisions or commitments made at a higher level.

Local authorities must then be in a position to respond to calls for accountability both from those above them (national authorities) and those below them (local communities).

For this reason, adequate mechanisms must be established to ensure this accountability. Local authorities must be transparent about the ways in which gender mainstreaming objectives – both when mandated at the national level or when insisted upon at the community level - are being realized.

\* adapted from S. Tadjbakhsh, Accountability for Good Decision Making: Budgets-Making Processes. UNDP, 2000.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio on regional councils / local government councils	Regional, municipal	Gender balance at local government level.	Whether women or men in local government have the capacity and will to represent women's interests and needs.	Local government association
% of local governments that have an explicit policy commitment on gender equality.	National, regional	Extent to which local governments have expressed political will to promote gender equality.	Effectiveness of such policy, the degree to which it is adhered to.	Local government association, or survey of local governments.
% of local government expenditure targeted at gender mainstreaming and gender equality initiatives	Local	Financial commitment to attaining policy goals on gender equality.	It is important to note that some important signs of commitment (such as public affirmation by government officials of the importance of gender) do not require large expenditures.	Local budget review

## Possible Interventions and Entry Points

*Many of the strategies employed for promoting gender balance in national governance structures can be transferred to local and regional levels of governance as well. Other ideas include:*

- **Delegation of responsibilities to Gender Sensitive Community-based organizations (CBOs):** Cooperation with CBOs often represents a very efficient and effective means of delivering services to the community (e.g. providing drop-in counselling services, community-based education initiatives, etc.) Moreover, such groups are often in a better position to identify needs of community members. Specific collaboration with gender-sensitive organizations can help mainstream a gender perspective into the provision of such services.

*Decentralization works best when it encounters a lively civil society... If social groups are aware, assertive and well-organized for political purposes, they are likely to keep elected representatives well informed of their problems and hard pressed for responses and for effective, honest government.<sup>37</sup>*

- **Cooperation with Local Government Association:** The National Local Government Association (or similar body) can be a very useful entry point for the provision of gender-mainstreaming training and awareness-raising on gender issues.
- **Collection and Dissemination of Best Practices:** Many local governments have implemented community-based projects that represent excellent examples of gender mainstreaming. Oftentimes these projects are sponsored by local governments in donor countries, yet the bilateral nature of these project relationships mean that best practices are not always shared with other municipalities. Research on best practices or case studies (followed by a seminar or other means of disseminating and discussing the collected information) can help raise awareness about these initiatives and generate ideas for their replication elsewhere.
- **Data collection:** As another common problem is the incompleteness of statistical data and analysis<sup>38</sup>, the introduction of systematic data collection (by the local government association or other body) on gender balance and other gender mainstreaming issues at the local government level would greatly assist monitoring and evaluating progress.
- **Implementation of Accountability-Enhancing Mechanisms:** Increased attention to accountability can promote greater gender equality. These mechanisms can include:
  - starting **budget initiatives**, where expenditures and/or revenues are analyzed from a gender perspective. Cooperation with community groups in the implementation of such initiatives can enhance community participation and the credibility of the local government. (See Gender Brief on **MACROECONOMICS and TRADE** for more details);
  - holding **public hearings** on issues that are of major concern to the community and may affect men and women differently – example, new community development projects, new child-care schemes, etc..

<sup>37</sup> J. Beall, pg.11

<sup>38</sup> UNDP, "Women's Political Participation and Good Governance: 21<sup>st</sup> Century Challenges" pg. 3

## III. Governance And The Household/Family

**What is the Issue? What is the Goal?**

Efforts to promote gender equality in governance and participation are often directed at elected public bodies. Sometimes advances for gender equality in the public sphere can bring promote enhanced gender equality within the home, but they may also bring backlash. In any case, issues of “gender governance” within the home must be addressed as an issue in its own right, and cannot be expected to simply “trickle down” from equality in other areas.

There are various spheres of governance and decision-making within the home and family:

- **Time use and reproductive work:** Even in cases where both adults in the family are employed outside the home, the largest burden of reproductive work usually falls to women. For example, in most OECD countries women’s work burden averages 7 to 28 per cent more than men’s. This is likely to be the result of a family governance environment that does not address “time” as a crucial resource. As with other resources, an egalitarian and democratic household should jointly decide about where and how time should be spent, and by whom, to the maximum benefit of all involved.

Furthermore, if time is not recognized as an important resource, it is likely that women’s contribution to reproductive work will not be valued within the household, which can unjustly decrease her decision-making power.

[LINK: See the Gender Brief of MACROECONOMICS AND TRADE POLICY, part II on Reproductive Work.](#)

- **Household Resources and Expenditure:** Research conducted in both developed and developing countries reveals that households demonstrate a strong bias in favour of men, whether young or old, in terms of food distribution. Similar male biases are found for expenditures on health, education, work tools and personal consumption.<sup>39</sup>

Furthermore, when states provide allowances, subsidies or other forms of state-sponsored support to families (e.g. “baby bonuses” or welfare payments), there is no automatic guarantee that these are being distributed equally to intended beneficiaries. This is because decision-making processes within households may not be egalitarian and may not necessarily function to the ultimate benefit of all household members.

- **Family Planning and Parenting:** In households with children, important decisions need to be made about how children are raised, their schooling, what they are allowed to do at what age, amongst other issues.
- **Sexual Relations:** Sexuality is a vital aspect of a fulfilling personal life. In many households, women may have little control over their sexual life and little power to decide when and how they would like to engage in sexual relations. In other instances, sexuality may be one of the few means of “power” women can access, and thus it becomes a site of intense contest and conflict between men and women. It must be recognized that both men and women have the right to sexual lives free of coercion and violence.

[LINK: See the Gender Brief of HEALTH, part on Violence for a discussion on violence in intimate relationships.](#)

There are countless types of families and family decision-making models – while some are particularly “patriarchal” (where men wield most decision-making power), others are in fact the opposite. In some cases, women may enjoy a large degree of decision-making power within the home (particularly in relation to child-care, parenting and home economic issues) and may perceive more balanced decision-making as a threat – particularly as they may enjoy very little power outside of the home.

While some decision-making is a question of negotiation between partners, it is also crucial to bear in mind that decision-making power is largely influenced by societal and community norms about who should control finances, family affairs, sexual relations, and so on.<sup>40</sup>

<sup>39</sup> Kate Young, “Household Resource Management” pg. 137

<sup>40</sup> Kate Young, “Household Resource Management”. pg. 143

The **goal** in terms of governance in the family/household is:

- to **promote gender balanced decision-making** in all matters related to the family and household.

## Why Bother?

**Chain Reaction and Accountability:** Although family life is often seen as “private” (i.e. something with which government should not concern itself), aspects of family life undoubtedly spill over into all other areas of life: issues of family governance affect men’s and women’s economic opportunities, their ability to engage in political life, their mental and physical health and not least, the welfare of children and elderly family members. This is a good justification for promoting an egalitarian, safe and healthy family governance environment.

Moreover, it should not go unnoticed that governments already insert themselves into many areas of family governance – they provide child allowances or other family benefits; they legislate access to family planning methods and abortion; they determine at what age and for how long children should attend school; they determine taxation policy based on familial relationships, and so on. Given this considerable degree of “interference” in family life, a truly accountable government must ensure that all interventions promote, rather than hinder, gender equality within the household.

**Efficiency:** Governance at the household level needs to be considered from a gendered perspective, as this immediately brings to light the issue of reproductive (unpaid) labour. Unless the contribution of reproductive labour is recognized as part of the macroeconomic processes of a nation, truly efficient policies that maximize the potential of the whole population can not be put in place (see Gender Brief on MACROECONOMICS and TRADE for further details).

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of time spent on: – housework – parenting/ childcare	National. Distinctions should be made between households where both parents are employed outside the home, or where both are unemployed.	Gender-balance in reproductive labour. More equal labour-sharing can be an indication of more equal decision-making.	Equal labour does not necessarily indicate more equal decision-making. More detailed sociological research must be conducted to definitively reveal this.	Time-use survey*
% of major decisions in households (with a male and female adult) that are taken jointly by both partners, in regard to: – family planning – parenting – household chores – household budget – sexual relations	National	Extent of gender balance in different types of household and family decision making	Because survey will necessarily be based on subjective opinions of men and women, this data will reveal trends and perceptions more than hard facts.	Decision-making survey*
Male:female registered ownership of: – houses/ apartments – cars – family businesses (Official joint ownership should also be recorded)	National.	Gender balance in ‘de jure’ ownership of main material assets. This is significant in light of divorce or separation.		Official records, survey.

\* Specific methodology needs to be developed so that surveys can be repeated and longitudinally compared. See Possible Interventions and Entry Points below.

## Possible Interventions and Entry Points

- **Shift from Household-based measurements to Individual-based measurements:** Because women and men have different access to resources and decision-making in households, studies that measure income, resources and other indicators should be careful to differentiate between members within households, as there is no guarantee that all members benefit equally from household resources.
- **Time-use surveys:** Commissioning special research on time-use within families can provide data that will help analyze and monitor how men and women divide reproductive work. This is often a good indication of gender balance in household and family governance, as well.
- **Decision-making surveys:** Commissioning decision-making surveys can provide more precise data on how decision-making happens within households. Special methodology needs to be developed so that surveys can be repeated and longitudinally compared. Methodology should consist of interviewing an appropriate sample of men and women (who live in households with both a male and female adult present). The main question that forms the base of such a survey is:

Are major decisions on parenting/household budgets/reproductive work taken by you, your male/female partner, or both jointly – never/ some of the time/ most of the time/ always?

- **Family and Parenting Education:** Governments (and local governments in particular) can support community-based services that offer classes and support groups for parenting and family education. Gender aspects related to decision-making within the household should be integrated into these activities. Prenatal classes offered to expectant parents can also integrate issues of joint-decision making in parenting.
- **Review of Taxation Policy:** Taxation policy should be reviewed, taking into consideration unequal resource distribution within households. For example, a shift from direct taxation to indirect taxation may harm non-earning household members, while savings from lower direct taxation rates may not be transferred from earning members to others in the household.<sup>41</sup>

## IV. Participation and Governance in the Private Sector

### What is the Issue? What is the Goal?

With increasing privatization and policies of “rolling back the state”, the private sector is becoming an increasingly important actor in national development processes. However, as the private sector continues to develop and stabilize in transition countries, little attention is paid to the different roles of men and women in these developments and how this may affect society more broadly. Again, incomplete statistical data and gender analysis on women in decision-making positions within the private sector hampers a better understanding of this issue, as well as meaningful solutions.<sup>42</sup>

**Access to Economic Resources and Opportunities:** While profit is generally the bottom line in the private sector, there are various ways to reach this end goal. However, not all of these paths equally promote and enhance gender equality, either within the sector itself, or in other spheres of life that it affects. At the same time, data from all regions of the world reveal that by far the majority of entrepreneurs, owners of businesses and top-level managers in the private sector are men. As a result, for the most part, priorities are set and decisions (for example, about employee benefits, child-care policies, part-time regimes, parental leave) are made by men.

<sup>41</sup> Kate Young, “Household Resource Management.” pg. 144.

<sup>42</sup> UNDP, “Women’s Political Participation and Good Governance: 21<sup>st</sup> Century Challenges.” pg. 3

This male-dominated system of governance can also become a “vicious circle”: because private sector policies may not favour women, women are cut out of opportunities to progress to the top decision-making positions within the private sector and are also deprived of the opportunity to shape corporate policy.

**Access to Influence through Economic Power:** Whether desirable or not, one aspect of free-market societies is the fact that those holding economic power also hold a certain degree of influence – over the development of the private sector and other government policies alike. Because governance of the private sector tends to be male-dominated, the political influence is largely centred in the hands of men. Again, this can again lead to the development of policies that do not necessarily promote women.

The policy **goal** in terms of governance in the private sector is thus:

- to encourage private sector decision-makers to **adopt a gender mainstreaming agenda**, which would include **removing barriers** to the equal participation of men and women in private sector governance.

## Why Bother?

**Justice:** An enhanced role of women in the private sector would most likely lead to their enhanced economic resources and power. This in turn would mean a greater presence of women in the “private sector lobby” of government and could bring a more enhanced gender equality and social justice perspective to this lobby.

**Credibility and Accountability:** Recent research has revealed that women in business are less likely to pay bribes to government officials, whether due to higher standards of ethical behaviour or risk aversion. This means that increasing the role of women in private sector governance may also improve the credibility and legitimacy of the private sector-government relationship.

*Efficiency: Gender mainstreaming could have distinct economic advantages for the private sector. Giving more women access to decision-making positions means that a wider pool of skills, innovation and standpoints will be brought to the table, which can result in greater efficiency and effectiveness of business.*

**Quality of Life:** If enhancing women’s role in private sector governance means that more family-friendly policies might be adopted, then this will also bring great benefits to the quality of life of both men and women, and their families.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
1	2	3	4	5
Male:female ratio top level managers in the private sector	National	Gender balance in private sector management	Female or male manager commitment to gender-friendly policies	Survey
Male:female ratio of owners of businesses (small, medium, large)	National	Gender balance in private enterprise ownership.	Precise obstacles to female or male ownership. “De facto” responsibility (i.e. enterprise may be in husband’s name, while wife takes care of day-to-day operations).	Survey
Male:female ratio, chairperson of the board of major companies	National	Gender balance in top private sector decision-making positions.	Female or male chairperson commitment to gender-friendly decision-making	Survey
Male:female ratio of members sitting on the board of major companies	National	Gender balance in private sector decision-making positions.	Female or male board member commitment to gender-friendly decision-making	Survey

1	2	3	4	5
Women's average private sector wage as a % of men's	National	Women's economic opportunities as opposed to men's.	This indicator does not take into account different non-personal expenditures that men and women may be responsible for.	Labour force survey

## Possible Interventions and Entry Points

- **Government support to “gender-friendly” private sector policies:** Governments and policy makers can encourage private sector decision makers to adopt policies that enhance and promote gender equality within the private sector. This could include affirmative action policies, child-care policies, paternal leave policies, and others. Governments can also hold state enterprises accountable to the government for their implementation or non-implementation of such policies.
- **Cooperation with Business and Employer Associations:** Governments can work together with private sector organizations to help develop industry standards and policies that promote and enhance gender equality. These organizations can also be a way to target members of the private sector for participation in seminars, workshops and other awareness-raising events that link the prosperity of the private sector with gender equality.
- **Micro-finance initiatives:** Government-sponsored micro-finance initiatives targeted at women can give them a sometimes needed “head start” in becoming entrepreneurs and decision-makers in the private sector. At the same time it should be recognized that micro-finance initiatives alone can not solve the problem, as not all women want to or will become entrepreneurs.

Labour, or work, is gendered at every level. This Gender Brief highlights some of the many ways to integrate a gender perspective into labour policies and the workplace itself.

LABOUR

### BOX: KEY INDICATORS OF THE LABOUR MARKET (KILM)

This set of country-wide indicators were developed by the ILO with the hope of monitoring new labour market trends. Although a special effort to highlight gender dimensions of each indicator was made<sup>43</sup>, many practitioners will recognize that gender-disaggregated data is not always readily available or accessible. Gender mainstreaming efforts should seek to correct this problem.

1. Labour force participation rate
2. Employment-to-population ratio
3. Status in employment
4. Employment by sector
5. Part-time workers
6. Hours of work
7. Urban informal sector employment
8. Unemployment
9. Youth unemployment
10. Long-term unemployment
11. Unemployment by educational attainment
12. Time-related underemployment
13. Inactivity rate
14. Educational attainment and illiteracy
15. Real manufacturing wage indices
16. Hourly compensation costs
17. Labour productivity and unit labour cost
18. Poverty and income distribution

<sup>43</sup> S. Elder and L. Johnson (1999) pg. 448.

## I. Economic Activity And Time Use: Productive And Reproductive Labour

### What is the Issue? What is the Goal?

LINK: See Gender Brief on MACROECONOMICS: II. Reproductive Work

Gender differences in economic activity rates are often used as an indicator of gender equality in any given society. For example, the female percentage share of the total economically active population is one of the three main indicators used by the UNDP to calculate the Gender Related Development Index (GDI).

Notably, while male labour force participation rates around the world are uniformly high, marked variations exist in female economic activity rates. Most often low female labour force rates indicate strong cultural stereotypes about gender roles, which keep women out of the labour force. For example, a 30% proportion of female economic activity might indicate a culture in which the female home-maker and the male bread-winner is the dominant gender role model.

It is worth noting, however, the potentially misleading nature of this indicator, for by no means do lower female economic activity rates mean that women are an idle, wasted resource: In these cases, women are most likely nonetheless engaged in reproductive, unpaid work that requires an equal or greater investment on their part. Efforts to increase female labour market participation rates must therefore take into account gender gaps in time use more generally, and concomitantly seek more balance in hours spent on reproductive labour by men and women.

In regards to unpaid or reproductive labour, it is worth noting that those who are responsible for unpaid reproductive labour face several barriers:

- their **time** to participate in the paid labour market is restricted;
- their **personal income** is restricted; and
- their **choices** (such as participating in politics, pursuing self-improvement or recreational activities) are restricted as a result of less time and money.

Reproductive labour is thus an important consideration for labour policy-making and analysis, as gender equality within the labour market can only be fully achieved if gender equality in the reproductive labour sector is enhanced as a parallel priority. Policies that address the contribution and necessity of unpaid work to support and sustain the productive labour market must be part of labour policy.

At the same time, gender balance in economic activity rates does not necessarily mean that women and men are treated equally within the labour market. Gender mainstreaming in the labour market *must* go beyond quantity (i.e. economic activity rates) to explore how, where, by whom and under what conditions men and women are (or are not) employed, in reproductive and productive labour. That said, equal participation of women and men in the labour market remains a policy goal towards which to strive.

*In sum, the ultimate goals here are two-fold:*

- equal participation rates of men and women within the **productive labour force**; and
- equal division of **reproductive labour** between men and women.

In order to attain these long-term goals, a medium-term **goal** must be:

- **increasing choices** of both men and women through policies that encourage more equitable division of both productive and reproductive work.

### Why Bother?

**Justice:** Work is a value. Many people value their right to be productive in the career of their choice. While some people do and will continue to choose homemaking, child-rearing or other unpaid work as their career, cultural stereotypes or other barriers that restrict one gender's ability to choose the paid labour force as a career option is a violation of the right to self-determination and gainful employment.

**Efficiency:** Efficiency arguments can be used to highlight the link between increased gender equality and economic growth: World bank research<sup>44</sup> shows that higher levels of economic development follow from increases in gender equality – one indicator of which is level of female economic activity. Thus removing barriers to women entering the labour market is also removing barriers for increased economic growth. This argument does not focus on “making use of an idle resource” (women are not idle – they carry the burden of reproductive work), but rather on removing obstacles to full and equal economic participation, which can serve as a catalyst for enhanced development.

LINK: See Gender Brief of MACROECONOMICS for additional related arguments.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Female share of total economically active population (productive labour market)	National (also, regional or local)	Gender gap in productive employment rates.  To some extent, the existence of pervasive barriers (legislation, stereotypes) that keep women out of the labour market altogether.	Qualitative inequalities of employment  Gender balance in reproductive work.	Labour market surveys
Male:female ratio of hours spent on both productive and reproductive work	National (or regional, local)	Time-based contribution of men and women to national product	The human value of unpaid reproductive work	Time-use and labour market surveys
Male:female ratio of economic output, according to market-value estimates, for both productive and reproductive work	National (or regional, local)	Monetized contribution of men and women to national product	The human value of unpaid reproductive work	National income accounting system plus satellite accounting system estimates*

\* See Brief on MACROECONOMICS AND TRADE: II Reproductive Work

## Possible Interventions and Entry Points

- **Removal of legal barriers to female productive employment or male reproductive labour** – A review of legislation from a gender perspective (see **Part I – Step 4 “Mapping the Situation”** for a description of tools) will highlight any legislative barriers to women’s full involvement in the productive labour market (e.g. restrictions on women from entering certain professions or from performing certain tasks). Similarly, restrictions on men from full participation in reproductive labour will be revealed (e.g. denial of paternity leave to fathers).

Once identified, any such obstacles should be removed.

- **Publicly-provided childcare options** – State support for reproductive labour, such as the provision of childcare, can greatly increase women’s participation in the productive labour market. For example, research cited by the World Bank has underlined the fact that high quality and low cost childcare options in Sweden have encouraged more women to join the labour force, even where spousal income is high.<sup>45</sup> In Sweden, childcare options are largely sponsored by local governments.

<sup>44</sup> See the World Bank Gender and Development Working Paper Series at <http://www.worldbank.org/gender/prr>.

<sup>45</sup> WB Consultative draft Chapter 5 pg. 12

- **More specific research of gender and employment** – The links between gendered aspects of labour market trends and reproductive labour are often not evident to policy makers, and are rarely made explicit in policy papers. More specific research on the national manifestations and effects of this “double burden” should be commissioned, and results should be widely communicated.

LINK: See also IV. Working Conditions and Family-Friendly Policies below.

## II. Unemployment, Job-Seeking And Retraining

### What is the Issue? What is the Goal?

*Closely linked to the issue of economic activity is that of unemployment. Data shows that unemployment rates are almost always higher for women than they are for men. As two researchers elaborate, there are potentially four reasons for this<sup>46</sup>:*

- Women are more likely to leave and enter the workforce for personal reasons. Because of their higher entry and exit rates at any one time, proportionally more women will be looking for a job;
- Women are likely to have a narrower range of career options than men, resulting in greater competition within the jobs available to women
- Women in many countries lack the level and range of education and training required for employment
- Women are likely to be the first affected by the lay-offs that often accompany company restructuring.

These explanations highlight several important points: first, women’s unemployment is closely linked to reproductive labour in a way that men’s is not (or at least not to the same extent). Second, women face direct barriers to employment such as lack of jobs available and sometimes lack of skills. Finally, women are not as highly valued within the workforce, and thus face many indirect barriers such as discrimination and stereotypes.

While it is crucial to address the pervasive barriers to gender equality in the labour market noted above, at the same time it would be unwise to automatically assume that inequalities only affect women. In situations of major socio-economic upheaval and transition, policy-makers should also be on the alert for increasing levels of male unemployment, which may be the result of major cutbacks in an occupational sector dominated by men. In former socialist countries in particular, many researchers have noted that rapid social change has hit men particularly hard, and unemployment among men has in some countries risen more quickly than unemployment among women (see Box).

Unemployment among women and unemployment among men may thus stem from disparate factors, and the effects of this unemployment will impact men and women in quite different ways.

*The ultimate goal of policy-making is therefore:*

- to **minimize unemployment** amongst both men and women.

In order to achieve this long-term goal, the medium-term goals must be:

- to recognize **cultural, social and historical factors** that influence unemployment among men and women in policy making; and
- to develop **job-creation and retraining** schemes that address the disparate needs and situations of men and women.

### Why Bother?

**Accountability:** Increasingly often, election platforms of both local and national government or parliament candidates include “job creation” as a promise. Because the population is made up of both men and women of economically active age, job creation, retraining or other unemployment reduction schemes must benefit

<sup>46</sup> Elder and Johnson (1999), pg. 459

both men and women – governments and parliaments need to be held accountable for those that do not, and comparisons of male and female unemployment levels can assist in doing so.

**Efficiency, Quality of Life and Social Interdependence:** Job creation schemes that are not gender-aware run the risk of exacerbating gender gaps in unemployment levels. While dramatic unemployment and underemployment mean less productivity (and efficiency) for the nation as a whole, this also has obvious impact at the household and individual level.

**Chain Reaction:** The issue of unemployment (or underemployment) is of course closely linked to issues of sustainable livelihoods and poverty. Poverty reduction programmes thus must also be sure to address the social, cultural and historical factors that make unemployment and the lack of sustainable livelihoods a gender issue (See also **POVERTY** Gender Brief).

For men in particular, chronic unemployment due to massive restructuring in transition countries can be closely linked to pathologies such as alcoholism, depression and suicide. This can in part be attributed to the difficulty individuals and societies face in adapting to radically changing gender roles. In terms of solutions, then, it is crucial to address the significance of gender both in seeking to curb male pathologies and in reducing male unemployment levels.

#### **TRANSITION IN CENTRAL AND EASTERN EUROPE AND THE CIS – SAYING GOOD-BYE TO “MEN OF STEEL”:**

*Men have been particularly hard hit by labour market changes that have accompanied the transition to a market-based economy in Central and Eastern Europe and the CIS, as the “labouring man of steel” of Soviet industry has become increasingly obsolete. While women have undoubtedly been forced to shoulder a great deal of the socio-economic burden caused by transition, researchers note that women have often been better able to adapt, as they have been struggling with similar burdens of balancing work and home throughout the Soviet era. Men, on the other hand, have been greatly “shocked” by the transition, resulting in a “crisis of masculinity” as their traditional role as the breadwinner is threatened. The unfortunate conclusion of this shock has been in high rates of male mortality, suicide and alcoholism.<sup>47</sup>*

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female unemployment rate	National (also regional)	Gender gap in unemployment levels	Reasons for unemployment. Differences in male and female success in reentering the labour market.	Statistics bureau
Male:female ratio of long-term unemployment rate (% of job seekers who fail to find employment within 6 months)	National (regional)	Gender gap in chronic unemployment. Can indicate prevalence of discrimination in hiring practices, or failure of training schemes to equally equip men and women to reenter the labour market.	Precise reasons for job-seeking failure.	Labour force survey

<sup>47</sup> see True (2000).

## Possible Interventions and Entry Points

- **Implementation of Anti-discrimination Measures:** In order to address female unemployment, it is crucial that issues of discrimination in hiring practices and down-sizing are addressed and eliminated. This includes adopting necessary legislation, policies and mechanisms for dealing with complaints, as well as providing information to both job seekers and employers. See **IV. Equal Opportunities** below for further details.
- **Research:** It may be useful to undertake more detailed sociological research to clarify trends revealed by indicators. For example, a survey of employers' attitudes and needs will in the first place reveal what sort of skills and knowledge they are looking for in employees, which can help guide retraining schemes. Furthermore, such surveys can also reveal discriminatory attitudes or stereotypes that employers harbour, if asked whether they would prefer to hire men or women, and reasons for their choices. This can provide justification for awareness raising campaigns.
- **Targeted Retraining Schemes:** Particularly in the context of transition countries, retraining programmes may be necessary to assist job seekers in reorienting their skills and knowledge to a post-Soviet market economy. It is important to target these programmes at both genders, and ensure that they are being utilized by both.

Furthermore, care should be taken *not* to entrench occupational segregation (see III. Occupational Segregation below) through such schemes, whereby men are retrained in information and communications technology, for example, while women are trained as seamstresses. Retraining schemes can in fact be used as an entry point and corrective measure for occupational segregation.

- **Micro-Credit:** Targetted micro-credit schemes to establish small businesses has proved a popular and effective way of addressing sustainable livelihoods for women. At the same time, however, we should bear in mind that it is not realistic to assume that every unemployed women will become a small business entrepreneur. Similarly, these schemes are often very limited in scope and do not meet the full demand for them. For these reasons it is important to think of additional and alternative methods.

## III. Occupational Segregation

### What is the Issue? What is the Goal?

"Gender-based occupational segregation is one of the most important factors contributing to women's inequality in the labour market", and manifests itself in two ways<sup>48</sup>:

- **horizontal segregation** - the tendency of men and women to be employed in different occupations (e.g. teacher vs. construction worker)
- **vertical segregation** – the tendency of men and women to be employed in different positions within the same occupation or occupational group (e.g. assistant vs. manager).

*Examinations of the situations in many diverse countries show that traditionally "female" occupations are paid less and carry less prestige in society.*

*The goal of policy making should thus be:*

- **equal prevalence** of men and women both vertically and horizontally throughout the occupational spectrum.

<sup>48</sup> H. Melkas and R. Anker. Gender Equality and occupational segregation in Nordic Labour Markets. ILO. 1998.

## Why Bother?

**Efficiency:** “Occupational segregation by sex negatively affects the efficiency of the labour market as a whole.”<sup>49</sup> This is because it imposes a certain **inflexibility** upon the labour market, whereby employers are hindered from hiring the most suitable person because of preconceived ideas about which sex should be performing the job.

Additionally, the so-called “**glass ceiling**” that many women hit due to vertical segregation prevents the talents and capabilities of half of the labour pool from fully contributing to the economy.

**Sustainability:** In times of economic crisis or high unemployment, negative effects or trends might be exacerbated by the inflexibility within the labour market due to sex segregation – for example, male unemployment may become more acute because of men’s unwillingness or “unsuitability” to perform lower paying, lower prestige “women’s jobs.”

Furthermore, massive changes that take place in the labour market due to the reorientation of economies (e.g. moving away from intense industrialization, more focus on services and tourism, or the rapidly growing job market in media, communications and information technologies) can exacerbate sex segregation and its negative implications. If certain parts of the labour market are strongly sex-segregated, one gender is at risk of greater negative impact in the face of these fundamental labour market shifts.

**Quality of Life:** At an individual level, gender-based occupational segregation negatively impacts both men’s and women’s career opportunities, as their options are limited, either due to stereotypes they themselves have inherited and now espouse (e.g. “As a man, I can’t be a nurse”), or due to biases they will face from potential employers.

Furthermore, this segregation has been shown to negatively impact women’s levels of remuneration: women are not valued as highly as men in the labour force, therefore “women’s” jobs are typically remunerated at a lower level. The low value and prestige of “female jobs” also serve to perpetuate the vicious circle of segregation, as men are for obvious reasons unwilling to perform those jobs in most instances.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Female share of employment, measured for each occupation	National	Degree of horizontal sex segregation of all occupations	Vertical sex-segregation within occupations	Labour market surveys
Table of occupations, ranked by average hourly earnings, alongside table of occupations, ranked by level of female participation	National	Comparative levels of remuneration across occupations in light of which occupations are predominantly female.	Vertical wage differentials between occupations	Labour market surveys
Index of Dissimilarity (ID) <sup>50</sup> (also: compare over time)	National	Level of gender-based occupational segregation of those in the labour market	Extent to which women are in the labour market	Specific data analysis required

<sup>49</sup> H. Melkas and R. Anker, pg. 5

<sup>50</sup> A measure of statistical association which ranges from 0 (no segregation) to 1 (total segregation). Minimum proportion of men plus minimum proportion of women who would need to change occupation so that female proportion is same in all occupations. See Melkas and Anker pg. 102 for complete mathematical definition.

## Possible Interventions and Entry Points

- **Anti-discrimination policies plus enforcement mechanisms** – (see also **IV. Equal Opportunities and Sex Discrimination** below.) The introduction of anti-discrimination policies should help address the problem of horizontal sex-segregation due to employer bias when hiring either men or women for “non-traditional” jobs. Similarly, such policies help eliminate gender discrimination when promoting employees, which results in vertical sex segregation. Note that such policies are only effective if they are accompanied by accessible and efficient monitoring and enforcement mechanisms, such as an equal opportunities ombudsperson or Labour court.
- **Targeting the education system:** The seeds of job market segregation are planted during secondary, post-secondary and professional education, where boys and girls are often segregated into subject areas that will lead them to their respectively “appropriate” career choices. See the Gender Brief on Education for ideas on how to address segregation within the education system.
- **Targeted Retraining Schemes:** Training programmes and courses for job-seekers are an important entry point for redressing gender-based occupational segregation. Special efforts can be made to recruit men and women to retrain in “non-traditional” professions.
- **Child-care and other family friendly policies** – Vertical segregation is partially caused by the continued assumption of responsibility for reproductive work by women. A more even distribution between men and women of reproductive labour (child care, elderly care, house work) will help bridge this gender gap (See **V. Working Conditions and Family-friendly Policies** below for additional information).

## IV. Equal Opportunities and Discrimination

### What is the Issue? What is the Goal?

Gender based discrimination within the formal labour market is prevalent to varying degrees around the world. Such discrimination can be:

- **direct** - in the form of policies or practices that explicitly deny opportunities or privileges to a person on the basis of their sex; or
- **indirect** – practices or policies that appear “gender neutral”, but which systematically result in denying opportunities or privileges to members of one or the other gender at a disproportionate level.

Indirect discrimination often manifests itself in terms of working conditions (see **V. Working Conditions and Family-Friendly Policies** below).

Direct discrimination emerges in several employment contexts:

**Hiring practices** – Employers may discriminate against one gender or the other when hiring new employees. This may be because of prevailing sex stereotypes that assume women are “unsuitable” for certain jobs, while men are “unsuitable” for others. This is direct sex discrimination. Similarly, women may be discriminated against because they assume most of the reproductive work burden: employers may believe that they have children to care for, and will thus be less committed to their paid. Research also shows that women are particularly vulnerable to discrimination on the basis of age (i.e. they are considered too old) or appearance (i.e. they are not considered “attractive enough”). Again, these are forms of direct sex discrimination.

**Career advancement** – Employers may deny career advancement privileges to one gender (most often women) because of false assumptions made about women’s and men’s leadership or management skills, or because they assume women have too many family responsibilities. This is direct sex discrimination.

**Wages and Benefits** – Men and women may not be awarded equal pay or benefit packages for performing equal work. At times, this may manifest itself by giving different types of contracts (full-time vs. part-time or

limited contract) to one sex or the other. Any differential treatment in terms of wage or benefits on the basis of sex is direct sex discrimination.

**Harassment and Violence** – Gender-based sexual harassment in the workplace is also a form of sex discrimination. It manifests itself in a variety of ways, including inappropriate sexual behaviour, advances, comments or withholding of privileges or rights until propositions are positively responded to. This type of discrimination should be viewed in the context of power relations and deformed views on gender relations that are used to sometimes attempt to legitimize such inappropriate and illegal behaviour.

Reasons for sex discrimination vary, but they are often closely associated with gender stereotypes and preconceived notions about the role of men and women in society. Because attitudes and values are not easily changed, policies and actions need to be put into effect to guard against discrimination.

The ultimate **goal** of policy-making is thus:

- **elimination of discrimination** on the basis of gender within the labour market

Because this is a long-term endeavour, a crucial short and medium-term **goal** is:

- **enhancing** the efficacy, efficiency and accessibility of **machinery and mechanisms** for monitoring and preventing sex discrimination in the labour market

## Why Bother?

**Justice:** The most obvious reason for ensuring equal opportunities and treatment stems from the argument for justice and fairness. There are absolutely no grounds for denying an individual equal treatment or opportunities simply because of his or her sex; discrimination on this basis must be eradicated in the name of the numerous treaties, conventions and normative documents that demand gender equality, particularly within the labour market.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of legislation explicitly prohibiting gender-based discrimination in the labour force	National	Stated political will to address gender-based discrimination in the labour force	The efficacy of any such legislation	Desk review
Number of complaints (to appropriate national machinery) related to sex discrimination in the labour force (compared over time).	National	Rather than actual incidence of discrimination, this indicator is more likely to measure information levels of the public on their rights regarding sex discrimination.	Real level of discrimination	Human Rights Office, Ombudsperson or relevant machinery records
Male:female ratio of private sector management positions	National	Extent to which women face barriers in terms of career advancement	Precise nature of barriers	Labour force survey
Average male monthly earnings vs. Average female monthly earnings	National	Indication of discrimination (either direct or indirect) in terms of wages	Precise causes of wage discrimination (direct discrimination, structural barriers, occupational segregation, etc.)	Labour force survey

## Possible Interventions and Entry Points

- **Anti-discrimination legislation** – The introduction of anti-discrimination legislation which prohibits discrimination on the basis of sex should make it explicit to all employers that such discrimination is illegal and punishable by law. Although a great deal constitutional law includes a statement on the equality of the population on the basis of sex, this can be made stronger and more explicit with specific legislation addressing the labour force.
- **Effective and accessible complaints mechanisms** – In order for any legislation to be effective, it must be accompanied by effective and accessible complaints mechanisms. This means that both men and women need to have access to courts, an ombudsperson, an equal opportunities complaints board or other similar institution that can investigate and rule on their complaints in a timely fashion. Such an institution must have the mandate to make enforceable (binding) rulings, not just recommendations.
- **Disseminating information on rights and procedures** – In order for legislation and mechanisms to be effective, both women and men need to have information regarding them. Often, average citizens may not be aware of existing legislation (particularly in a time of transition, when laws are passed, amended and annulled at an outstanding pace) or of measures they can take to exercise their own rights under these laws. Information campaigns and other communication strategies are necessary to ensure public awareness. These must be sure to highlight gender aspects, and to effectively target both male and female audiences.
- **Challenging stereotypes that fuel discrimination** – The root causes of gender-based discrimination need to be addressed if any attempts to eradicate it are going to succeed. This means addressing stereotypes and attitudes that do not equally value and respect the contributions of men and women in the labour market. Education and awareness-raising campaigns, particularly on the issue of harassment, may be a helpful first step.

## V. Working Conditions And Family-Friendly Policies

### What is the Issue? What is the Goal?

The quality of one's employment is as important as whether or not one is employed. This quality can be partially determined by the conditions under which people are employed. **Wages** (discussed above in terms of **Equal Opportunities**), working hours, working environment (including childcare facilities), job security and the treatment of employees in terms of benefits or privileges comprise the main elements that dictate quality. Inherent within these conditions are employers' recognition and respect for other aspects of their employee's lives – namely reproductive work and family time. The quality of these two spheres – work life and family life – to a large extent determine one another.

**Working hours:** While on the one hand, "good quality" employment will mean that work hours are not too long (thus encroaching upon other spheres of life), too few working hours can result in "underemployment."

Evidence shows that women spend less time at their paid jobs than men. This may indicate that men spend too many hours in paid jobs, resulting in a lack of time for family-life. At the same time, available data shows that more women than men would like to, and are available to work more hours than their current jobs allow.<sup>51</sup>

Reasons for these differences vary, and may include:

- discrimination against women in the workplace
- women's predominance in part-time and casual work (see below)
- attitudes and policies within the workplace and the family sphere that place different expectations and demands on men and women.

<sup>51</sup> Elder and Johnson (1999), pg. 463.

*A study comparing male and female management styles revealed that men spared little time for non-work related activities, while female managers made time for other non-work related responsibilities.<sup>52</sup> While this gender difference is not a direct result of any policy, it likely stems from women's double burden outside of the workplace (i.e. they have no choice but to make time for other responsibilities).*

**Work Environment and Childcare:** A good work environment allows both men and women to balance productive and reproductive responsibilities. Two aspects of this environment include:

- the **atmosphere** within the work environment and its **flexibility** (in terms of both written policies and general attitudes) towards the needs of parents (to care for sick children, to attend school events, etc);
- responsibility by the work-place to provide **concrete support to families** in the form of child-care (creche) facilities, maternity and paternity leave, etc.

**Job-security and Benefits:** Transition from a local economy to a globalized, knowledge-based economy has meant profound in working conditions, including the increase of part-time and limited contractual work, in place of stable, full-time work. People also switch jobs more frequently. This results in a sharp decrease in job security. These shifts may also mean a loss of benefits associated with full-time work. For example, research shows that women across the world are far more likely to be casual employees and home-workers, and in almost all countries, a much larger proportion of women than men work part time.<sup>53</sup> These types of salaried work offer less job security and fewer benefits.

In sum, the **goal** here is two-fold:

- ensuring **equality** between men and women in terms of **quality of employment**, through policy and other interventions;
- enhancing the ability of both men and women to balance productive labour with reproductive labour through the **promotion of family-friendly work environments**.

## Why Bother?

**Efficiency:** Research done in the Nordic countries, for example, suggests that state-sponsored policies that monetize housework and child-care (thus freeing up many women to be active in the labour market), has greatly contributed to falling levels of gender-based occupational segregation.<sup>54</sup> This leads to a more efficient labour market (see above, **Occupational Segregation**).

Furthermore, workplaces that are responsive to employee needs retain a loyal and motivated staff, which positively affects efficiency. Respecting and supporting the role of both female and male employees as parents and care-givers is a step in this direction.

**Quality of Life and Social Interdependence:** “In a flexible work system the family is at the hub of productive and reproductive activity. When it is potentially strong ... it serves as a risk hedge against periods of unemployment and as a source of child developments for its offspring, of investment capital for adults’ and children’s education and training, of networking for job search and upward mobility, for personal security and growth.”<sup>55</sup> Given this extent to which quality of life and opportunities can be improved through this “family hub”, it seems crucial that labour policies support and enhance, rather than threaten, the development of strong families.

**Chain Reaction:** Less job security means less sustainable livelihoods. If one gender (often women) is far more likely to be employed in part-time, casual and contractual work, this means that one gender is also at greater

<sup>52</sup> Hegelsen, 1990, as cited in M. Claes (1999), pg. 441.

<sup>53</sup> Elder and Johnson (1999), pg. 454-456

<sup>54</sup> Melkas and Anker, pg. 97.

<sup>55</sup> Carnoy (1999), pg. 422.

risk for poverty, in the absence of job sustainability. This can then exacerbate other gender gaps associated with poverty.

Furthermore, research in EU countries reveals that gender equality in labour and income levels cannot be achieved by equal opportunity policies in the labour force alone: complementary policies on unpaid care must also be instituted.<sup>56</sup> In other words, without attention to family-friendly policies that address the necessity of care, equality within the labour market will remain elusive.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of private sector employees that have an explicit policy aimed at making work places family friendly	National	First level of commitment to family-friendly policies by private sector employers	The effectiveness of existing policies and extent to which they challenge or support existing gender roles	Survey of private sector employers
Male:female ratio of hours spent on reproductive labour, weekly, where both partners are involved in full-time paid work	National	High difference in reproductive work hours may indicate lack of family-friendly policies in the workplace, as research shows that in their absence women shoulder the majority of the burden.		Time-use surveys
Existence of state-compensated paternity leave scheme	National	State commitment to encouraging shared responsibility for child-care.	Use of the scheme; barriers to its effectiveness.	Policy/legislation review.
If it exists, % of employed fathers who take advantage of paternity leave.	National	Low percentage indicates barriers to the policy's effectiveness. May require awareness-raising among employers and general public.	Precise barriers to effectiveness.	Survey

## Possible Interventions and Entry Points

- **Education through employers' organizations:** Employers themselves are sometimes unaware of the benefits that more family-friendly working conditions can bring: attention to the needs of employees (in terms of job security, need for child care, or appropriate working hours) will enhance employee satisfaction, thus simultaneously enhancing productivity and loyalty and reducing employee turnover.
- **Policies governing working conditions in contractual, part-time and casual employment:** The shift away from full-time, stable employment seems inevitable, thus governments must be prepared to respond to it. This includes ensuring that those people involved in this type of work (often women) are not discriminated against. The development of responsive policies may entail more detailed research of labour market trends and employer behaviour.

<sup>56</sup> J. Plantenga and J. Hansen (1999), pg. 378.

*Targeting education is a vital part of any gender mainstreaming strategy. As this Brief highlights, education can be examined as an indicator of gender equality within the sector, both among students and education professionals. Equally important, however, is approaching the education sector as a potential entry point for challenging the gender stereotypes that largely contribute to sustained gender inequalities in society more broadly.*

## I. Equality In Enrolment And Completion Statistics

### What is the Issue? What is the Goal?

Globally, the standard measure of gender equality in the education sector is the number of girls enrolled in school and/or who have completed school (at all levels) in comparison to the number of boys.

In many countries in the Southern hemisphere, girls' enrolment lags behind boys', and the obvious objective here is to attain balance between boys' and girls' enrolment. In European and other countries, on the other hand, the gap in overall enrolment statistics is narrow, and in some cases, boys enrolment is even starting to fall behind that of girls at some levels. At the same time, equal *overall* enrolment rates often hide persevering inequalities in specific types of education and fields of study. For example, girls typically still lag far behind boys in information technology programmes, while there are fewer boys than girls enrolled in humanities, education, cultural programmes and in some countries, medicine and social work.

Even where completion rates are somewhat equal for boys and girls, detailed analysis is needed to identify specific gender-based problems: do more boys than girls drop out to enter the labour force? Are girls leaving school due to teenage pregnancy? Are more boys than girls from poor homes becoming truant? Successful programmes and projects that address non-completion should address specific reasons why boys and girls drop out of school.

As regards enrolment and completion rates, the **goal** should thus be two-fold:

- **equal enrolment** (45%-55%) between boys and girls in all faculties, programmes of study, and levels of education;
- **equal completion rates** between boys and girls in all faculties, programmes of study and levels of education.

### Why Bother?

**Justice:** Many international and regional human rights instruments oblige States parties to ensure gender balance in enrolment. For example, Article 10 (a) of CEDAW specifically calls on states parties to ensure equal participation between men and women in all levels and areas of education.

**Credibility and Accountability:** Programmes or projects looking to raise completion rates need to examine the different reasons why boys and girls leave school – otherwise the basis for these programmes will lack credibility, and will ultimately fail to adequately address their target audience.

**Efficiency:** Research shows that “gender inequality in education is bad for economic growth,”<sup>57</sup> as states cannot capitalize on the full productive and creative potential of its population if men or women are not receiving a good education. Furthermore, sex segregation in certain subject areas leads to sex segregation in the labour force (see below).

**Chain Reaction:** There is an undeniable link between sex segregation in school programmes and sex segregation in certain sectors of the labour market, which can lead to higher unemployment and underemployment rates for women.<sup>58</sup> For example, girls are often encouraged to study subjects whose logical career segue is less prestigious and lower paid. This is also directly linked to high risk of poverty in female-headed households, as well as the

<sup>57</sup> Dollar and Gatti, (1999).

<sup>58</sup> Elder and Johnson (1999), pg. 460.

low value placed on female-dominated sectors of the labour market. Closing gender gaps in the labour market needs to begin with redressing them within the school system.

[LINK: See LABOUR Gender Brief for further details](#)

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:Female ratio of enrolment at all levels of schooling (primary, secondary, vocational, post-secondary)	district region national	Gender balance/gaps in enrolment; differences that may exist according to region, school district	Reasons for gender gaps  Enrolment trends among boys and girls from differ socio-economic groups or ethnic groups	Enrolment statistics
Male:Female ratio of enrolment in all subjects in secondary, vocational and post-secondary education	district region national	Gender balance/gaps in different areas of studies, i.e. "pipeline" reasons for gender-based occupational segregation		Class attendance logs Departmental enrolment statistics
Male:female ratio of completion rates at all levels	district regional national	Gender balance/gaps in completion rates	Reasons for non-completion (differences between boys and girls)	School records

## Possible Interventions and Entry Points

- **Curriculum Changes** - Firstly, measures need to be taken to eliminate sex segregation, if it exists, in subjects such as homemaking, home economics, carpentry, machine shop, or other subjects that are traditionally considered to be only for boys or girls.
- **Additional Research** – Gender-based research and analysis must form the basis of policy making. For example, sociological surveys that investigate reasons for non-completion, and which highlight differences in causality between boys and girls, are instrumental for designing programmes to help address truancy and non-completion.
- **Targeted Recruitment and Encouragement** - If high levels of sex segregation in certain subjects are identified, special efforts must be made to encourage more balanced enrolment.

For example, if female enrolment in information technology programmes is lagging, guidance counsellors, teachers and school principals should all be personally encouraging more young women to take these courses. Often times, girls might not feel that this is an acceptable profession for them, or may feel pressured into studying something more "traditional." Mentoring programmes can also help, whereby young women already enrolled in such programmes tutor or offer other forms of support to entering students. Role models – successful women working in this profession – should come to speak at career fairs or other such activities.

Similar steps can be undertaken to encourage boys to study teaching or social work, or other "non-traditional" subjects for boys.

- **Campaigns and Awareness Raising** - Because sex segregation in various subject areas is theoretically a "choice" that students make, it is important to ensure that both boys and girls are aware of all their options. Information and awareness campaigns about options open to both young men and women may help broaden their choices. Such campaigns can be implemented with the help of a diverse selection of stakeholders (see note on Stakeholders below).

## II. Structural Equality Within The Teaching Profession

### What is the issue? What is the Goal?

Many countries exhibit patterns where most teachers at the primary school level are female, with the proportion of male teachers increasing as the level of schooling increases. Notably, day-care and pre-school positions in particular are heavily dominated by women. Managerial positions, such as principals, on the other hand, are often (although not always) held disproportionately by men. The result is a sector which is disproportionately dominated by women, except in those positions with higher wages and prestige.

Structural equality within the teaching profession is thus both an issue of equal opportunities and sex-based occupational segregation within the labour market. Questions raised here need to be linked to employment policies and actions within the labour market. (See *Why Bother?* below, as well as **LABOUR Gender Brief** for further details).

On the other hand, this is again an issue of stereotypes and gender roles.. A lack of male teachers at the primary school level, for example, means a lack of male role models for children at this age. This can reinforce stereotypes that claim only women are responsible for guiding, teaching and caring for children in their formative years.

The **goal** in terms of structural equality in education is therefore:

- promoting **equal participation** of both men and women at **all levels** and in **all areas** of the teaching profession.

### Why Bother?

**Justice:** A lack of females in top-level (higher paid and more prestigious) education jobs is an issue of equal opportunities and anti-discrimination, and at the very least deserves attention from this perspective. Particularly given women's extensive experience in the education sector, a lag in female employment in top level education positions reveals a potential lack of fair treatment.

**Efficiency:** Occupational segregation within the education sector results in inefficiency within the labour market, as less mobility and choice is available to both men and women, resulting in an inflexible labour market. Particularly in times of economic crisis or transition, such inflexibility can greatly exacerbate gender gaps in unemployment rates.

[LINK: See LABOUR Gender Brief for further details on Occupational Segregation.](#)

**Chain Reaction:** In many countries, teachers receive very low wages in comparison to professionals employed in the private sector. Furthermore, teachers, particularly at the primary school level, are mostly women. This combination, unfortunately, makes teaching a low prestige profession, which in turns drives quality and the value of the sector down.

### Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
1	2	3	4	5
Male:female ratio of teaching staff	District, Regional, National	Gender balance/gaps in teaching staff		Labour market survey (provided that disaggregation of jobs education sector is provided)

1	2	3	4	5
Male:female ratio in top-level education management positions (school and institution directors, principals, rectors, deans)	District, Regional, National	Gender balance/gaps in higher paying and more prestigious education professions		Labour market survey (provided that disaggregation of jobs education sector is provided)

### Possible Interventions and Entry Points:

- **Equal Opportunities and Anti-discrimination Policies:** If women are being kept out of top-management positions due to systemic gender discrimination, this needs to be addressed with anti-discrimination policies and legislation, coupled with enforcement mechanisms. Equal opportunities policies that actively promote and encourage women in management positions can also be effective (see **LABOUR Gender Brief**).
- **Wage Review in the Context of Educational Reform:** Because part of the reason for sex segregation in the education sector jobs is low remuneration, governments should consider reviewing teachers wages in the context of sectoral reform, with the aim of boosting the prestige of teaching professions.
- **Targeted Recruitment of Men:** Men should be actively encouraged to join the education sector. This can be done through campaigns stressing the importance of male role models, perhaps in cooperation with teachers' unions.

### III. Gender Roles And Stereotypes: School Curricula And Teacher Training

#### What is the Issue? What is the Goal?

*What* is taught in the classroom and *how* can either exacerbate pervasive gender stereotypes or serve as an entry point for challenging and overturning them. However, at present, this opportunity is not sufficiently taken advantage of, and the school system may be doing more to validate gender stereotypes than challenge them.

**The Committee of the Women's Convention recently found that sex-segregated schools, curricula and textbooks encouraged gender stereotyping in many transition countries across Central and Eastern Europe.<sup>59</sup>**

In order to transform this barrier into an opportunity, several issues deserve consideration:

**Primary and Secondary School Curricula:** There are various opportunities at the primary and secondary school level where instruction on gender roles and stereotypes could be formally integrated into the curricula. Particular areas of focus for in-depth coverage of gender roles and relations should be:

- Health education and sex education – i.e. gender equality in interpersonal relations, the family and the household; gender-based violence;
- Civic studies – i.e. gender equality issues in political representation and participation; civil society and NGO efforts in supporting gender equality;
- Human rights education - i.e. issues of justice and fairness; anti-discrimination on the basis of sex and other “differences”.

<sup>59</sup> UNICEF (1999), pg. 20

At the same time, it is equally important all subjects are taught in a gender-aware manner – otherwise positive messages in specific “gender-aware” classes will be undermined by contradictory messages in other classes.

**Post-secondary Programmes:** At the post-secondary school level, it is becoming increasingly common for universities and colleges to offer gender studies programmes. These are often interdisciplinary, including subjects like literature, sociology, psychology, political science, development studies, cultural studies and philosophy. Such programmes offer students with a special interest in gender the opportunity to become gender specialists. This is important for preparing future gender experts to work in Government, NGOs and research institutions.

At the same time, gender equality issues can also be integrated into other programmes of study in more traditional faculties and departments, for public policy and public administration programmes and faculties of law.

**Teaching Materials and Textbooks:** Here, gender mainstreaming efforts should investigate questions like: Is a gender equality perspective mainstreamed into textbooks and other teaching materials? For example, are men and women, boys and girls always portrayed in stereotypical gender roles, or are children introduced to alternative, more egalitarian models of gender relations as well?

**Teacher Training:** The way in which teachers present any materials – from maths to health education to social studies – can serve to either challenge or confirm stereotypical gender roles. For example, sociological research in North America and Europe has revealed that gender biases are often propagated by teachers in the classroom. These biases take many forms, from favouring male students in maths or science classes, to reinforcing gender stereotypes in classroom exercises (role plays that have the mother staying at home and the father out working, etc).

Treatment of students is a related question. At times teachers have been shown to be more lenient with boys about completing assignments or misbehaving in class. This reinforces the message that it is acceptable for boys, but not for girls, to “act out” in aggression or frustration. This can lead to problems for both genders in future social interactions.

**Student Councils and Extra-curricular Activities:** The school environment is also an important site of socialization and interaction of young people with other young people. Models of behaviour enforced at this level will often be replicated in adulthood. After-school activities and student councils should also therefore be examined from a gender perspective. Are both boys and girls offered equal opportunities to engage in activities that are both “traditional” and “non-traditional” for their gender? Do student councils respect principles of equal participation and gender equality?

In summary, the **goals** here are several:

- to eliminate unhelpful gender stereotypes from **teaching materials** and curricula content;
- to capitalize on the opportunities offered by the education system to **challenge** gender roles and stereotypes and offer alternative, more egalitarian models;
- to identify and **eliminate biases** within the classroom that favour either boys or girls, or which reward or punish behaviour of one gender.

## Why Bother?

**Justice:** Fair and equal treatment in the classroom teaches children about the principle of equality by example. Conversely, the lack of fair treatment enforces the idea that equality may be a theoretical principle, but not applicable to everyday life.

**Accountability:** As education is for the most part funded by public resources, teachers, administrators and education policy-makers are accountable to both parents and society for providing young people with the highest quality of education possible. Parents and other members of society thus have a right to demand that issues of fair treatment and elimination of gender stereotypes are taken seriously by educators, and that necessary resources are diverted to ensure this.

**Chain Reaction:** Gender stereotypes and traditional gender roles are inherited generation to generation, but seldom questioned in terms of benefits or barriers they may present to the development of a just and prosperous society. Such stereotypes can greatly limit human potential – both in terms of boundaries that women and men place on themselves, and in terms of unjust boundaries imposed upon others by individuals and societies.

Because of these far-reaching consequences, addressing stereotypes in the school system, both early on and in a sustained manner, can help break this intergenerational cycle.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of school boards offering gender sensitivity (mainstreaming) training to teachers	National District	Commitment of educational sector to ensuring promotion of gender equality in the classroom	Quality of this training; How this training is translated into practice in the classroom	Survey of school boards
% of teachers trained in gender sensitivity	National District	Coverage of gender sensitivity training	Quality of this training; How this training is translated into practice in the classroom	Surveys or training records
Existence of gender studies programme(s) at the post-secondary level	National	Existence of option available to students at post-secondary level to specialize in gender issues	Programme quality	Survey of post-secondary institution calendars
Male:Female ratio of participants in all extra-curricular activities and clubs, disaggregated by type of activity (e.g. team athletics, arts clubs, literary clubs, etc)	school, school district, regionally, nationally	Gender balance/ gaps in extra-curricular activities		sign-up and attendance records of extra-curricular activities
Existence of a policy statement (for example, in mandatory curriculum guidelines) that gender equality be promoted in schools.	National (or district)	Political will to promote gender equality in school programme content	Actual implementation of this commitment	Educational policy review
If a policy statement exists, budget allocation to removing gender stereotypes from classrooms.	National (or district)	Financial commitment to policy intention (often, such policies are made but no funds are allocated for implementation).	Cost effectiveness of expenditures.	Budget review

## Possible Interventions and Entry Points

- **Guidelines and Methodological Materials:** Policy makers should ensure that there is a mandate for the integration of a gender perspective in primary and secondary school curricula. This should be followed up with the production of guidelines and concrete methodological materials that can assist teachers in implementation.

Furthermore, guidelines and methodological materials on gender sensitivity should also be developed for inclusion in pedagogical college (teacher training) curricula.

- **Cooperation with Local Governments and School Boards:** While national policy makers often have responsibility for the development of policies and guidelines for educational curricula, concrete implementation most likely rests at the local and school district level. Thus it is crucial that school boards and local government officials responsible for education are trained and offered support in gender mainstreaming initiatives.
- **Text-book audit:** Text-books and other teaching materials used in the classroom should be reviewed (ideally, by a gender specialist or someone with sufficient gender training) and the portrayal of non-egalitarian gender roles and stereotypes should be noted. This same audit should include recommendations and suggestions for how these examples could be amended.
- **In-service Training Seminars:** While optimally teachers should receive gender sensitivity training during their initial professional education, in-service teacher training (seminars, conferences) may be a less expensive stop-gap measure.

#### IV. Parent Involvement In Education

### What is the issue? What is the Goal?

Parents (or guardians) play a vital role in their children's education. Their involvement takes various forms: after-school support to children in completing assignments and homework, helping children and young people choose which programmes they wish to pursue, or formal involvement in parent associations or school boards. For these reasons, parents also need to be supported and offered guidance for enhancing gender equality in the education sector.

Teachers have an important role to play in mediating parent involvement in their children's education. For example, it is worth considering the messages that teachers pass on to parents and children that might unintentionally entrench gender stereotypes in family life: which parent do teacher contact when they wish to discuss a child's performance or behaviour? Which parent is invited to school conferences? Which parent is contacted when a child is sick or injured at school? The assumption is often made that only mothers are involved in the schooling and raising of children, and teachers might support this assumption by shutting fathers out of parent-teacher dialogue, whether formal or informal.

The **goal** in terms of parent involvement is thus:

- promoting **equal participation** of both female and male parents in all aspects of their children's education.

### Why Bother?

**Chain Reaction:** Parental responsibility for their children's education is an important aspect of reproductive labour. For various reasons, ranging from greater efficiency to improved quality of life and reduction of poverty, it is important to achieve more balance in the division of reproductive labour between men and women. Educators can assist by encouraging more active participation of male parents.

[LINK: See MACROECONOMY and LABOUR Gender Briefs for further information on the implications of reproductive labour.](#)

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:Female ratio of membership on school boards, parent associations	District, Regional, National	Gender balance/gap in formal parental involvement in education management	Gender gap in informal involvement	School board records
Male:Female ratio of parents attending teacher-parent conferences	School, District, Regional, National	Gender balance/gap in parental involvement in formal teacher-parent dialogue	Reasons for gender gap; Division of parental involvement at home	Teachers' records

## Possible Interventions and Entry Points

- Guidelines and Training for Teachers:** Teachers can be supplied with guidelines produced by school boards or the Ministry of Education (perhaps in cooperation with other stakeholders) that provide information on the importance of involving fathers and practical advice on how this can be done. Gender sensitivity training for teachers can also incorporate parent-teacher dialogue as one element for consideration.

### STAKEHOLDERS:

The input of "gender-aware" stakeholders in education policies and programmes can greatly assist you to mainstream gender at all stages of the project or policy cycle. In any case, remember to try to ensure gender balance within any stakeholder group involved in the policy or project.

Education Stakeholders...	.... plus Gender
<ul style="list-style-type: none"> <li>• Students</li> <li>• students groups and government</li> <li>• teachers</li> <li>• teachers unions</li> <li>• parents and parent associations</li> <li>• Ministry of Education and its departments and institutes</li> <li>• local governments</li> <li>• school boards</li> <li>• education policy researchers</li> <li>• education NGOs</li> </ul>	<ul style="list-style-type: none"> <li>• What is the gender balance in all of these groups?</li> <li>• Are there gender equality NGOs that have an interest in education (e.g. the women's information centre may have done research on education, there may be Women in Business NGOs that mentor young women in management courses, or other NGOs implementing school-based gender sensitivity training)?</li> <li>• Are there education NGOs that have a special interest in gender issues (e.g. an adult education association concerned with women learning IT skills, health education NGOs that want to integrate gender roles and relations into the school curriculum, or social education groups particularly concerned with high numbers of boys dropping out of school?)</li> <li>• Are there high-ranking officials in parliament or the Ministry of Education who are interested in pursuing a gender equality agenda within education?</li> <li>• Is gender equality an issue for student government, parents groups or other stakeholders?</li> <li>• Is there gender expertise within your department, in UNDP or elsewhere within the government that you can access?</li> </ul>

*Because biology and physiology are two of the few ways in which men and women irrefutably differ, health policies and programmes are logical entry points for the integration of a gender perspective.*

At the same time, we know that health is not simply the lack of physical infirmity, nor is it a simple question of bodily parts and functions – it is a holistic state of well-being, and is thus profoundly influenced by psychological and social factors. For this reason, an analysis of health must go beyond male and female bodies to the institutions, traditions and attitudes that play a crucial role in determining quality of care, and root causes of poor health. As many of these institutions and factors are premised upon the different roles of men and women in society, a gender perspective here is critical.

## I. Life Expectancy

### What is the Issue? What is the Goal?

Life expectancy at birth is one of the few health-related statistics that is widely available and gender disaggregated. Gender plays an important and irrefutable role in life-expectancy. Worldwide and as a group, women tend to live longer than men, and Eastern Europe maintains the highest gap between male and female life expectancy in the world.

Some important causes and factors of low male life expectancy include:

- deaths in armed conflicts and street violence;
- high mortality rates from accidents, including traffic accidents in particular;
- occupational hazards and accidents;
- high rates of suicide;
- alcoholism-related death.

*Thus while biology may play a role<sup>60</sup>, it is evident that male life expectancy can be dramatically affected by different environments in which men and women operate, by their different choices of coping mechanisms – all related to the social and economic gender roles assumed by men and women assume throughout their lifetimes.*

The reason for examining life expectancy from a gender perspective is to provide important insight into gender disparities in the health and well-being of the population. The ultimate **goal** in regards to life expectancy is:

- to **close the gap between male and female life expectancy at birth**, aiming for maximum life expectancy whereby both men and women can enjoy healthy and productive lives.

### Why Bother?

**Justice:** The ultimate human right is the right to life. It is therefore a human rights imperative to address factors that systematically deny one gender or the other the right to enjoy a full and healthy life.

**Efficiency:** Healthy national demographics require a roughly balanced male:female ratio. In transition countries, low average life span in men is largely affected by death from unnatural causes in working-age males. This has an obvious impact on the productivity of the labour force, and can thus affect the economic growth of the nation as a whole.

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<sup>60</sup> Research has shown women to be at a slight biological advantage in terms of life span (World Bank Consultation Draft, Chapter 1, pg.10)

**Quality of Life:** High death rates among working age males affects not only men, but women and families as well. For example, poverty rates among pension-aged widows tend to be very high, as they are unable to cover basic costs of rent and utilities from a single pension. Living conditions of families with children are also likely to deteriorate, particularly if the man was the main breadwinner (women's disadvantage in the labour market is also a factor here).

## Measuring Success

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Gap between male and female life expectancy at birth	National	Differences in male and female life expectancy	Causes of gender gap. Differences in life expectancy among groups of women or men (young and old, rural and urban, ethnic groups, etc). Such disaggregation should also be performed to provide more specific data.	Vital statistics

## Possible Interventions and Entry Points

Impacting mortality rates is a long-term process and effects of any policies or measures to reduce male mortality will not be evident for some time to come. Ensuring high quality mental and physical health care for men, targeting preventive care at men and reducing external risks (i.e. removing occupational hazards, reducing traffic fatalities) are directions in which policies should move to tackle this issue.

## II. Incidence of Disease and Other Health Problems

### What is the Issue? What is the Goal?

Disability-adjusted life years (DALYs) measure the number of life years an individual will lose to poor health or disability. While the ten leading causes of DALYs are very similar for boys and girls under the age of five, there are distinct differences in causes of DALYs in women and men aged 15-44.<sup>61</sup> This means that gender plays a very significant role in ill-health. If we analyse determinants of disease and infirmity, gender consistently emerges as an important factor:

- **Biological and physiological determinants:** Some diseases will affect only men or only women, such as those associated with reproductive organs and functions – for example, breast cancer or testicular cancer. Other diseases affect men or women disproportionately due to biological and physiological factors, such as cardiovascular disease and osteoporosis.<sup>62</sup>
- **Socio-cultural determinants:** Other gender disparities in incidence of disease and infirmity have their roots in social or cultural factors, which leave women or men more vulnerable. For example, high rates of alcoholism in men, determined by social factors, may lead to much higher incidence of liver disease. Changing social roles of men and women should also be noted for their impact on health: For example, drastic increases in female smoking worldwide, and particularly among young women, should be a cause for concern for health policy makers.

<sup>61</sup> World Bank Consultative Draft, page 13

<sup>62</sup> Hormonal changes after menopause double or triple women's risk of cardiovascular disease and contribute to osteoporosis, which affects about 10 percent of women worldwide. Reproductive Health Outlook, 2000

- **Economic determinants:** Economic factors and incidence of poverty can also profoundly affect incidence of disease. As women are often at greater risk of poverty than men, this has a negative effect on their health and can lead to higher incidence of illness.
- **Environmental determinants:** The gendered division of social roles and responsibilities often means that men and women live out their personal and professional lives in different environments – this can mean that they are exposed to different environmental risks. For example, women who spend a great deal of time in a kitchen that is improperly ventilated and which uses a gas or wood fire energy source can experience respiratory problems. Men, on the other hand, in general face greater exposure to carcinogens at work.<sup>63</sup>
- **Systemic determinants:** Research has shown that men use preventive health services much less frequently than women. Issues of poor access (see part IV of this Brief) can also be a barrier to early diagnosis and treatment of disease, which can lead to higher incidence of disease or infirmity - in this case, among men.
- **Multiple factors:** Very often, incidence of illness and disease will be affected by a combination of the above factors. For example, gender disparities in the incidence of HIV/AIDS can be traced to physiological, socio-cultural and economic factors.<sup>64</sup> Similarly, women lose more DALYs to sexually transmitted diseases than do men<sup>65</sup> – due to a combination of physiological and social factors.

Mental illness and depression – which represent a very serious problem to both men and women – can also stem from a variety of causes, including genetic predisposition, environmental and social factors. Because of dominant male stereotypes, men can be dissuaded from seeking professional help for problems such as depression or anxiety – instead turning to antisocial coping mechanisms such as alcoholism, or even suicide. Social and economic factors, such as violence, urbanization, and the disruption of cultural practices and traditional family roles, also contribute to the rising incidence of mental illness.<sup>66</sup>

The **goals** in regard to incidence of disease and other health problems are thus:

- **gender-disaggregation** of all **data** on incidence of disease and infirmity;
- analysis of **causal factors** from a gender perspective;
- development of **prevention and care** programmes that take gender into account, striving to **eliminate barriers** that make one gender more vulnerable than the other.

## Why Bother?

**Justice:** Each individual has a basic right to health and well-being. While some health problems are unavoidable, it is a human rights imperative of all states to take necessary means to eliminate barriers to the highest quality of health possible. As many barriers stem from gender roles or gender differences, states have an obligation to address these.

**Efficiency and Quality of Life:** Both men and women lose a considerable number of DALYs due to gender-related disease or infirmity. This loss could be controlled or eliminated if properly targeted and addressed.

Furthermore, if gender-based determinants are not considered, health promotion policies and will not be as efficient or effective as they might, were these determinants adequately addressed.

<sup>63</sup> WHO 1998, quoted in World Bank Consultative Draft, pg. 13

<sup>64</sup> Women's reproductive organs are more susceptible to the sexual transmission of HIV than are men, while socio-cultural factors often give them less control over their choice of partners and use of protection against HIV. Finally, women's engagement in commercial sex work, which can put them at increased risk of HIV transmission, is often linked to economic factors.

<sup>65</sup> Reproductive Health Outlook, 2000

<sup>66</sup> Reproductive Health Outlook, 2000.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Gap between male and female incidence of disease (per 100 000), for example: - cardio-vascular disease - oncological disease - HIV - depression etc.	National	Highlights gender gap in incidence of disease or infirmity.	Does not indicate determinants (reason) for gender gap	Medical statistics office

## Possible Interventions and Entry Points

- **Gender-disaggregated research and data presentation:** Since it is unlikely that statistics will reveal reasons for gender gaps in disease, it is important that more in-depth research is undertaken that can help pinpoint the precise determinants of a gender gap. Much research into causes of health problems already exists – this data must be gender disaggregated and a gender perspective (expertise) must be used to analyze this data.
- **Targeted screening:** Health policies should include targeted screening for men and women on the basis of what the above research reveals. One particular issue of concern is screening for common mental illnesses, such as depression and anxiety. Screening should be followed by appropriate treatment and referrals.
- **Development of targeted public health messages:** Where disease is preventable, public health messages should be appropriately targeted at both men and women, bearing in mind that they may trust different media authorities, receive their information from different media outlets and consume television and radio at different times of the day.

## III. Reproductive And Sexual Health

### What is the Issue? What is the Goal?

Reproductive health can be defined as “a state of complete physical, mental and social well-being in all matters relating to the reproductive system and to its functions and processes.”<sup>67</sup> It implies the right to make decisions about family planning and includes sexual health and relations as well. Even though reproductive and sexual health are often considered to be “women’s issues,” a true gender perspective is rarely integrated into policy and planning. Gender roles and relations are an inextricable aspect of reproductive health and sexuality, that can be analyzed and addressed in a number of contexts:

**Sexual and gender roles:** Socially accepted gender roles often give men primary authority over sex and reproductive health decisions, and can deny women the ability to refuse sex or negotiate condom use. As a result, women are often unable to adequately protect themselves against unwanted pregnancies, STDs, and their adverse health consequences.<sup>68</sup> Furthermore, pervasive male gender roles may deter men from using condoms or seeking out health services for either preventive or curative reasons. This affects not only their own health, but their partners’ health as well.

<sup>67</sup> International Conference on Population and Development 1994, Summary of the Program of Action.

<sup>68</sup> Reproductive Health Outlook, 2000.

**Maternal health and Women's health:** Safe motherhood should be a top priority in health care systems: expectant mothers require high quality care, including access to health behaviour and psychological counselling, choice regarding delivery, and essential obstetrical care for complications. At the same time, women need to be addressed first and foremost as *women*, rather than as vessels or potential vessels of the next generation. Women who can not or do not wish to have children must be offered the same quality of care and access to sexual health services, and must be allowed to freely decide on issues concerning their own fertility. Furthermore, women should be guaranteed high quality of care throughout their life cycle, and not just in their reproductive years.

**Men's health:** Men's sexual health and paternal health is often neglected in reproductive health care. Paternal health is often overlooked as a factor of infertility in couples, or in poor reproductive health as women (a reluctance on men's part to be tested for fertility or sexually transmitted infections may be related to dominant male gender identity). Men also require attention to their specific health needs, and the health of men throughout their life cycle should also be a health care priority.

**Young people:** *The majority of men and women (married and unmarried) become sexually active during adolescence<sup>69</sup>. Like adults, young people have the right to information about their reproductive and sexual health, and to high quality care and counselling, including contraception. Young people face discrimination within the health care system, including violations of their right to confidentiality and lack of access to appropriate information and services. Young people's sexual health is also largely determined by gender roles in society, which may lead to unwanted sexual intercourse, violence, unwanted pregnancy and sexually transmitted infections.*

The **goal** in terms of reproductive and sexual health is thus:

- ensuring that reproductive and sexual health is **not marginalized** as a “woman's issue”, guaranteeing full **information and services** to all **women and men**, throughout the **life cycle**;

for the **ultimate goal** of:

- achieving the **highest quality** of reproductive and sexual **health** for all men and women and guaranteeing **full implementation** of their reproductive and sexual **rights**.

## Why Bother?

**Justice:** Men and women, young and old, all have the right to the highest standard of information and services regarding their sexual and reproductive health. Omitting a gender perspective from such information and services means that these will be inadequate and sub-standard.

**Efficiency:** *Investing in proper information and preventive reproductive and sexual health care services for both men and women can avoid costs of expensive curative treatment and emergency care. Most interventions that promote reproductive and sexual health and rights are both low cost and highly cost-effective.<sup>70</sup>*

**Quality of Life:** Research shows that adolescent who receive appropriate information and services are more likely to delay sexual activity and have fewer sexual partners; they are also less likely to engage in risky sexual behaviour, have unplanned pregnancies or contract an STI.<sup>71</sup> In order to maximize this impact, it is vital to integrate a gender perspective into information and services.

Poor maternal health can also have devastating affects on children: not only in the womb, but during nursing as well.

**Safe Abortion:** If safe abortion is illegal, restricted or inaccessible unsafe abortion puts women at high risk of disability and death. Guaranteeing women the right and access to safe abortion is a question of **justice, efficiency and quality of life**.

<sup>69</sup> Family Care International, Briefing Card on Adolescent Sexual and Reproductive Health, 2000.

<sup>70</sup> Family Care International, Briefing Card on the Life Cycle Approach, 2000.

<sup>71</sup> Family Care International, Briefing Card on Adolescent Sexual and Reproductive Health, 2000.

## Measuring Success

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of a comprehensive national policy framework on reproductive and sexual health, which addresses needs of both men and women	National	Government commitment to putting reproductive and sexual health on the policy agenda and to recognition of both genders' role in this issue	The quality of such a policy and the adequacy of implementation	Policy review
Male:female ratio of: – HIV – syphilis – other STIs	National	Gender disparities in incidence of these diseases and infections. Large disparities should signal that a gender approach has not been successfully adopted in prevention programmes.		Medical statistics

## Possible Interventions and Entry Points

- **Expanding the Concept of “Maternal and Child Health”:** A policy review should be undertaken to ensure that “maternal and child health care” policies are not implemented at the expense of a broader reproductive health approach that includes fathers as well. Expanding “maternal and child health” to “reproductive health” can address paternal health as an important factor, while also encouraging men to be more active as potential fathers and care-givers.

Furthermore, such a review should check that all other aspects of women's health throughout the life cycle is adequately addressed by public health policies, so that her health is not valued only in a maternal context.

- **Elimination of legislative and policy barriers to the full enjoyment of reproductive rights:** Legal restrictions on a woman's right to free and informed choice in all matters of her reproductive and sexual life still exist in many countries. This includes restrictions on the right to choose safe abortion and restrictions on access to some contraceptive methods. Young people in particular face barriers regarding their reproductive rights. Action should be taken to guarantee full sexual and reproductive rights. These actions include:
  - policy and legislation review to discern any barriers to enjoyment of full sexual and reproductive rights;
  - elimination of any barriers to these rights, either through legislative amendments or necessary policy changes.
- **Life-skills Education Approach with Young People:** Simple provision of information does not provide young people with the necessary skills to enjoy full reproductive health – these skills include decision-making, negotiation, dealing with conflict, self assertion – all of which are closely related to the negotiation of gender roles and relationships. Any life skills education programmes should incorporate a strong gender component.
- **Service Provider Training:** Training can make providers more sensitive to gender and sexual issues. Coupled with new clinical protocols, training also can give providers the knowledge and skills they need to offer more extensive services and to address clients' sexuality in a non-judgemental way.

#### PROVIDERS WHO ARE SENSITIVE TO GENDER AND SEXUALITY ISSUES<sup>72</sup>:

- consistently treat female and male clients with respect;
- collect information about a client's sexual partners, practices, and problems to help determine their health and family planning needs;
- help clients assess their STD risks;
- determine how much control clients have over their sexual lives and, when appropriate, suggest a contraceptive method that can be used without their partner's knowledge, offer to talk to the client's partner, or teach the client how to negotiate sexual matters; and
- look for signs of STDs, evidence of physical and sexual abuse during physical exams.

Policy makers can support service provider training through cooperation with non-governmental and professional organizations and by drafting and enforcing protocols on quality of care from a gender perspective.

## What is the Issue? What is the Goal?

### IV. Health Sector Reform

Many countries in transition are currently undergoing major reform in the health care sector, often including a restructuring of both health care financing and services. Health sector reform should strive to improve equity in access to health care, as well as quality of care. This means policy makers need to address issues such as the prioritization of selected basic services, cost-recovery, restructuring human resources, decentralization and community involvement. Various gender issues deserve consideration here:

**Focus on primary care and prevention:** *Many reforms entail a shift from tertiary and specialized services towards primary care (i.e. regular consultation with a general practitioner, who will refer clients to specialists if necessary).*

*This shift will likely affect men and women differently. For example, research in many countries has shown that men rarely seek out preventive health services and tend to their health only once "something is wrong." Men thus risk falling through the gaps of a prevention-oriented system. On the other hand, women may be reluctant to have their relationship with their gynaecologist, for instance, necessarily mediated by a family doctor.*

**Human resource restructuring:** The medical profession in transition countries is often heavily female-dominated and wages are often low. This has several implications for gender mainstreaming and health sector reform:

- The shift to primary care can create a "surplus" of specialists and reforms may seek to implement more efficient doctor-patient ratios. It is important to consider how these reforms will affect employment opportunities for women, ensuring that women do not bear the economic brunt of this restructuring.
- As jobs for managers emerge in order to help administer new health care systems, it is important to ensure that gender equality is taken into account when recruiting these managers. Otherwise there is a substantial risk that health care will become managed by men, yet implemented by women - resulting in vertical occupational segregation. ([LINK: See Gender Brief on LABOUR – Occupational Segregation](#)). For similar reasons, the role of nurses in the new system should also be analyzed from a gender perspective.
- Health care reform should thus also seek ways to increase the prestige and wages of medical jobs without simply transferring the control of this profession into the hands of men.

<sup>72</sup> adapted from Reproductive Health Outlook, 2000

**Introduction of user fees and financial reform:** Many health care reforms entail the shift from fully state-financed health care to the introduction of user fees for services. This shift will affect men and women differently, as men and women on average have different levels of disposable income and use health services in different ways.

Some evidence, for example, has suggested that men spend more money on higher level services than women. This may simply be because they are able to afford these services, while women cannot. Moreover, women are largely responsible for caring for children and the elderly –which means that women may also be largely responsible for paying for these services. This may disproportionately affect their financial reserves. User fees may also mean a rise in “home care” by family members – again, this is likely to increase women’s reproductive work burden.

The **goal** of integrating a gender perspective into health care reform is thus:

- to **recognize gendered effects** of health care reform and to take these into account in the **design, implementation and monitoring** of reform policies.

## Why Bother?

**Justice:** In the context of human resource restructuring, it is important to bear in mind that equal access to career opportunities is a human rights imperative. The right to affordable health care is also critical here.

**Credibility:** One goal of health care reform is improved quality of care. If men or women do not perceive these reforms to meet their needs, the credibility of reforms can suffer.

**Efficiency:** Another main goal of reforms is increased efficiency of the health care system. However, if gendered patterns of service usage are not considered, the efficiency of the system may be undermined. The increased burden on women to care for sick family members can also reduce productivity of the labour market overall.

**Quality of Life:** Changes in the labour market, which inevitably will include loss of jobs, can have major economic consequences for those individuals working in medicine (and for their families).

## Measuring Success

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Ratio between men and women employed in the health profession at the following levels: – top level managers and administrators – other administrative personnel – primary care doctors – specialists – nurses	National	Gender balance in different areas of the health profession. Pay attention to gender gaps between high-paid and high prestige jobs vs. low-paid, low prestige jobs.	How this division is influenced (or will be influenced) by health care reform. Therefore, it is important to monitor and note changes throughout the period of reform, and, if possible, to predict changes before reforms are implemented.	Employment statistics
Average amount of money spent on health care yearly, men vs. women.	National. Should be measured before and after reforms.	Any differences between men and women in terms of increasing their expenditures on health care due to reforms		Household budgets*

\* special methodologies may need to be developed, as household budget surveys are not always sufficiently gender-disaggregated so as to differentiate between men’s and women’s available resources and their expenditures. See Possible Interventions and Entry Points directly below.

## Possible Interventions and Entry Points

- **Monitor Reforms:** Review of health sector reform by a UK-based NGO has noted that there is little concrete evidence so far as to how these reforms address and affect men and women differently. This is attributed to the lack of systematic monitoring of reforms from a gender perspective<sup>73</sup>. It is crucial to monitor the gendered impact of any reforms, in terms of both health and economic impact on men and women.
- **Gendered Analysis of Household Budgets:** One concrete research initiative is to analyze expenditures within households for health care. It is important here to note that few households operate on the principle of a “common pot” of resources equally available to all household members, and therefore the different resources available to men and women and their different priorities in terms of expenditures must be carefully investigated.

## What is the Issue? What is the Goal?

### V. Access to Health Care

The mere existence of health services does not necessarily mean that those requiring them will have access to them, and research on access issues has highlighted that gender can play a critical role.

Several aspects of access which need to be examined from a gender perspective include:

**Availability and Location of Services:** Time is a valuable resource, and can determine the accessibility of services. For example, services only offered during regular office hours pose obstacles to those unable to take time off from paid employment, or for parents who have to care for young children during the day. Additionally, the location of services may make them more or less accessible to different segments of the population. People living in rural areas in particular are faced with great barriers, in terms of both time and cost required for travel. Because of different roles men and women play at home and in the workforce, they are likely to have different needs regarding the availability and location of services.

**Quality of Care and Provider Attitudes:** *The quality of services that clients receive will also play a role in determining access – if clients do not perceive that their needs are being adequately or appropriately met, they may discontinue use of services. Gender insensitivity from medical practitioners is a very critical factor here.*

**Economic Determinants:** Poverty (which affects men and women differently) has been strongly correlated to poor health. While on the one hand, poor health may increase poverty, on the other hand, poverty also limits access to high quality and appropriate services. This may be because costs of services or medication are prohibitive to some users. Even women who are not technically “poor” generally do not have the same access to economic resources as men, which can affect their access to health care as well.

[LINK: see Gender Brief on POVERTY for further information](#)

**Social Determinants:** The social roles of men and women influence their access to services. If women are overburdened with both reproductive and productive labour, they may not have the luxury of time to access needed health services. On the other hand, men who may be shut out of the reproductive labour sphere and burdened with stereotypes of the “infallible male” may experience psychological barriers to seeking needed health care – and preventative care in particular.

**Age and Ability:** The intersection of age and gender can also affect access. For example, young women may experience barriers to services, particularly sexual health services (including access to contraception and safe and legal abortion) and their right to confidentiality in particular may be threatened. On the other hand, young men may not be adequately targeted for health services, and may experience difficulties finding appropriate

<sup>73</sup> H. Reeves (1998) pg. 3

services that are sensitive to their needs. Older people, too, face barriers in terms of access, particularly if age is accompanied by reduced mobility.

The **goal** in integrating a gender perspective into access to health care is thus:

- ensuring that both men and women have **full and equal access** to all aspects of health care and the health care system.

## Why Bother?

**Justice:** Equal access for both men and women is an issue of equal rights, and thus governments are obliged to ensure this.

**Accountability:** Because the health care system is at least partially financed by social taxes, policy makers are accountable for ensuring that both men and women can equally access to all health care services.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of men vs. % of women that regularly (annually) attend medical check-ups	National	Gender gaps in use of preventive services. Decreases in gaps can indicate efficacy of interventions.	Reasons for non-attendance	Surveys
Time (hrs. monthly) that men vs. women spend on medical appointments, incl. accompanying children or the elderly	National	Gender gaps in time resources expended on health care.	Reasons for increase or decrease in expended time resources	Sociological survey
Quality of care, including gender sensitivity of service providers	National	Can indicate sensitivity of service providers to gender as an access issue		"Mystery client" surveys*

\* see Possible Interventions and Entry Points for description of this methodology

## Possible Interventions and Entry Points

- **Research:** In order to better understand gender aspects of access issues, specific research needs to be carried out. This could include:
  - **sociological surveys** that discern male and female health-seeking behaviour, what barriers they face in terms of accessing health services, their opinions on the quality of care they receive, etc. In order for such data to be used as an indicator of progress (see above), specific and sound methodology must be developed so that surveys can be repeated and results compared over time.
  - **"Mystery client" surveys:** These surveys involve asking volunteers to be interviewed (or fill out a questionnaire) as they leave service delivery points about the quality of care they have just received. Alternatively, researchers can use certain health care services as clients, and evaluate quality of care themselves. Again, specific methodology that ensures statistical soundness needs to be developed.
- **Gender Sensitivity Training for Medical Professionals:** In order to ensure high quality of care, it is important to support medical professionals in enhancing their capacity to provide such care. This could include organization of in-service training seminars or the integration of gender-sensitivity training into

medical school curriculum. Cooperation with medical professional associations on standards setting is also a good entry point.

## What is the Issue? What is the Goal?

### VI. Gender-Based Violence

Gender-based violence includes but is not limited to rape, assault, threats of violence, harassment, degradation, forced social isolation, and other forms. **Sexual violence** is any unwanted sexual behaviour or act, or the targeting of a person's sexuality in an act of violence. Another wide-spread and overlapping form of gender-based violence is **domestic violence**: Research in almost forty countries reveals that from one-tenth to more than one-half of women have been beaten by a male partner.<sup>74</sup> Domestic violence also includes rape and sexual assault in partner sexual relationships. Violence is a complex, cross-cutting issue that requires multisectoral attention. At the same time, there are strong links between gender-based violence and health which demand attention to violence as a **major public health risk**.<sup>75</sup>

Gender-based violence is closely associated with traditional gender roles and definitions of manhood and masculinity.<sup>76</sup> This is true of violence that men perpetrate against women, but also of male violence against other men, which can have devastating health, social and economic consequences as well. The fact that violence (particularly domestic violence and male-male violence) is “socially accepted” in many parts of the world highlights the importance of **transforming accepted gender roles** and stereotypes in order to **prevent** such violence.

**Caring for survivors** of violence also has important gender implications. Women are often reluctant to report incidence of violence for a wide variety of reasons:

- social attitudes towards violence and towards women often make women feel **shamed or even responsible** for violence they suffer;
- women may justifiably fear **repercussions** from the perpetrator if the violence is reported;
- women are often **“revictimized”** by health care and legal systems that should support and protect them;
- women may not **trust** the health care or legal systems to help them;
- the social acceptability of violence may result in women simply accepting their pain and humiliation as a **“normal part of life”**.

Because of **pervasive masculine stereotypes**, men, too, rarely speak out about the trauma of violence they have suffered. They are expected to “take it like a man,” while fist-fights with other men are often viewed simply as a rite of passage or as men just “fooling around” – despite the fact that this violence is often unwanted, and can have grave consequences. Unfortunately, male-male violence is rarely perceived as **antisocial behaviour** or as a societal problem.

The **goals** in terms of gender-based violence and health are therefore:

- **raising awareness** about gender-based violence as a major threat to public health;
- taking **appropriate measures** to **prevent** violence and **care** for survivors from a gender perspective.

The ultimate goal should be the **eradication of gender-based violence** from society.

## Why Bother?

**Justice**: A basic human right of all people is the right to be free from cruel, degrading or harmful treatment – in a word, violence.

<sup>74</sup> Reproductive Health Outlook, 2000.

<sup>75</sup> It should, however, be noted that violence is not just an issue for the health sector – violence needs to be simultaneously addressed from the perspectives of legislation and justice, law enforcement, education, media and social services.

<sup>76</sup> Reproductive Health Outlook, 2000.

**Efficiency:** While the harm afflicted on an individual as the result of violence must remain the prime focus of prevention and treatment of violence, policy makers should remember that the effects of violence extend beyond physical and psychological harm to the survivor.

Nor does violence come cheap to governments. For example, a Canadian study in 1995 estimated that violence against women cost the country 1.5 billion Canadian dollars each year. From this perspective alone, governments cannot afford to ignore gender-based violence as a major policy issue.

**Quality of Life:** Women survivors of violence without a doubt suffer great damage to their mental and physical well-being. The World Bank has estimated that, among women of reproductive age, domestic violence and rape account for 5% to 16% of healthy years of life lost to death and disability (DALYs), depending on the region. Women who have suffered from sexual and physical violence are at increased risk for gynaecological disorders, unintended pregnancy, unsafe abortion, sexually transmitted infections, complications during pregnancy, miscarriage, low birth weight babies and pelvic inflammatory disease. Violence also leads to mental health problems, such as depression, anxiety, post-traumatic stress disorder, and suicide.<sup>77</sup> Thus violence cannot not be ignored as a major threat to public health.

**Chain Reaction:** The physical and psychological effects of violence penetrate every sphere of life – exposure to violence can lead to social isolation and antisocial behaviour, restricted economic opportunities, unwillingness to become involved in political, community or educational activities. It can have a profound effect on children who bear witness to it. Not least, its acceptance and further perpetration is a cycle that requires concerted and direct action in order to break it.

## Measuring Success

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Incidence of physical, psychological and sexual violence against men and women	National. Survey should be repeated and compared over time.	If the survey is well-designed, it can provide important detailed data on nature of violence, most likely perpetrators (family, strangers, etc), emotional and physical effects of violence, etc.		Sociological surveys*
% of men and percentage of women who report – sexual assault – physical assault	National (can be undertaken at other levels)	Willingness of survivors to report crimes. Can be an indication of trust in the legal process, sensitivity of police and justice system, level of taboo surrounding certain types of violence.	It must be stressed that reported crimes in general do NOT reflect the real level of violence.	Crime statistics
Budget expenditure devoted to: – violence prevention – care and rehabilitation for survivors of violence	National (or municipal budget level)	Financial commitment (and thus political commitment) to combating violence and dealing with its consequences.		Budget review.

\*specific methodology needs to be designed (and can be adapted from other countries) and interviewers must be well-trained in order for results to be credible.

<sup>77</sup> Reproductive Health Outlook (<http://www.rho.org>)

## Possible Interventions and Entry Points

- **In-depth Sociological Surveys:** Experience from many diverse countries around the world has revealed one common trend: in general, individuals do not readily discuss their experiences as survivors of violence, due to the mask of shame, silence, and taboo that too often accompanies this issue. For this reason, policy makers must accept that official statistics on reported crimes or general surveys do not reveal credible data on the real incidence and nature of gender-based violence.

*In order to obtain credible data, in-depth sociological research must be carried out by well-trained and sensitized professionals under appropriate circumstances (i.e. guaranteeing full anonymity, privacy and confidentiality). Results of such surveys are instrumental for designing and implementing appropriate plans for preventing violence and providing support to its survivors.*

- **Training for Medical and other Professionals:** Medical staff, as well as law enforcement and justice professionals, must be trained to deal with survivors in an appropriate manner that does not “revictimize” them. This includes allowing survivors full and informed choice in terms of reporting crimes, submitting to physical examinations and pursuing legal action.
- **Raising Awareness About Male-Male Violence:** In order for male-male violence to be prevented, awareness must be raised about its negative consequences. In many societies, male-male violence is so ingrained and accepted, that it has been come to be seen as normal to have two men cause serious physical damage to one another. The cause of such violence is undoubtedly connected to male gender roles, and this must be considered when developing prevention programmes.
- **Institutionalization of a Multi-disciplinary Approach:** This may include the setting up of an informal or formal interministerial working group to address issues of violence. Members should be drawn from justice, law-enforcement, social welfare and health, education and other relevant government departments.
- **State (or Municipal) Support to Crisis Intervention and Support Services:** While violence remains widespread, appropriate support and counselling services are needed to help men and women deal with the trauma. This is often most effective at the municipal government level. Cooperation with community-based organizations or other non-governmental organizations is an economical and effective way of delivering such services.

*Addressing and combating poverty is a multisectoral concern, which needs to be integrated into many programmes and policies. At the same time, it is important to examine poverty as an issue in its own right, particularly as regards the conceptual and methodological frameworks that guide the development and implementation of poverty alleviation initiatives.*

## POVERTY

### I. Defining and Understanding Poverty and Gender

#### What is the Issue? What is the Goal?

Poverty is gendered. In other words, men and women experience poverty differently:

- men’s and women’s poverty is often caused by different overall factors;
- the results of poverty often differ for men and women;
- men and women often adopt different strategies to cope with poverty.

The way a policy or programme defines and understands poverty will greatly influence the role that gender plays in poverty alleviation programmes. A very narrow understanding of poverty will not reveal the complex interplay of factors which create gender inequality, and thus make it difficult to address the gendered nature of poverty. Issues to consider when defining poverty include:

### Poverty of What?

Conventionally poverty was considered to be largely consumption and income poverty – that is, to be poor meant to have a lack of income and thus a lack of means to consume goods and services. This approach restricts the gender analysis of poverty, as even if men and women have similar incomes, research has shown that their experiences in terms of poverty can be vastly different, particularly considering their different responsibilities and capabilities in the context of consumption patterns.

However, in recent years the definition of poverty has been expanded and reshaped as “human poverty” – which refers to the denial of opportunities and choices, or “capabilities” for living a most basic or “tolerable” life.<sup>78</sup> This approach can thus elucidate not only the symptoms of poverty, but also its causes. It also facilitates a better appreciation of the way in which gender affects poverty, as it includes issues such as poverty of decision-making power, poverty of time, poverty of means of self-determination – all capabilities which are greatly influenced by one’s gender.

### Poverty: Outcome or Process?

Understanding poverty as a static “outcome” limits the development of appropriate interventions. Poverty must instead be understood as a “process”, and the complex interactions of a wide range of factors that lead to poverty need to be examined. While the first approach simply asks “who is poor?”, the second more vitally asks “why are they poor?”.

This is particularly important for integrating a gender analysis, as simply comparing male and female poverty outcomes tell us little about the social, economic and cultural institutions that cause men and women to experience poverty differently. This analysis is vital for developing effective alleviation strategies that transform these institutions, rather than simply providing “band-aid” solutions.

### Reciprocal links: Gender and Poverty

It is vital to consider how poverty is a “gender issue”, but we must also consider how gender equality (and women’s empowerment) is a poverty issue. In other words, any strategies to enhance gender equality must consider poverty also contributes to gender inequality.

In summary, the goal of gender mainstreaming in terms of conceptualizing and defining poverty should be:

- to ensure that a **gender perspective** be integrated into the way in which poverty is understood in a policy context
- to ensure that poverty is defined and understood as **human** rather than merely income poverty, and as a **complex process** instead of an outcome - both of which will better elucidate the complex gender dimensions of poverty.

### Why Bother?

**Efficiency:** “Gender inequalities in economic life also become a causal factor in the chronic poverty of all household members, not just of women in poor households and the intergenerational reproduction of poverty.”<sup>79</sup> In other words, gender equality is intimately connected to poverty, and not only to female poverty. Enhancing gender equality reduces poverty for men and women and their dependants, thus improving the efficiency and productive capacity of the nation as a whole.

**Quality of Life and Social Interdependence:** Addressing human poverty is about improving the quality of life, and not just the level of income, of the poor. For this reason, it is absolutely crucial that gender analysis is used when defining poverty: gender analyses shed light on issues such as power and redistribution within households, on cultural and societal barriers to autonomy, and on access to decision-

<sup>78</sup> Catagay (1998), pg. 7

<sup>79</sup> Catagay (1998), pg. 11

making processes. In this way, looking through a gender lens can make the human dimension of poverty more concrete.

**Chain Reaction:** In countries the world over, there are systematic relationships between gender inequality and the general level of human poverty.<sup>80</sup> Gender inequality and poverty should therefore be understood as a “chain reaction”, or even as a “vicious circle”. When gender inequalities are not addressed, poverty can not be fully addressed. When poverty is not put on the gender equality agenda, full attainment of gender equality cannot be achieved. Understanding poverty and gender as complexly interconnected issues will not only help alleviate poverty, but will also help achieve gender equality.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of gender analysis (i.e. specific mention of how poverty may affect men and women differently) in way that government defines poverty	National	Government's stated commitment to integrating poverty and gender	To what extent theoretical frameworks are transformed into effective solutions	Desk review of government concept and strategy papers on poverty

## Possible Interventions and Entry Points

- **Literature Review:** Neither gender equality nor poverty are simple policy issues. Luckily, a great deal of detailed studies have been carried out which analyze their interface. An important first step for policy makers involved with poverty might be to conduct an extensive literature review. While this Gender Brief should provide an introduction to poverty and gender, you may want to prepare more detailed briefs for colleagues and other decision-makers on gender and poverty as they pertain to your particular country situation. This will help establish political will and commitment to addressing gender in the context of poverty.
- **Briefing and Training:** A further step would be to conduct training or briefing seminars on the gender/poverty interface. This would not only provide additional information, but would also provide a forum for discussion and debate. The following table may be useful for addressing certain points that might arise during such a discussion:

ADDRESSING RESISTANCE TO GENDER MAINSTREAMING <sup>81</sup>	
Issues That May Arise	Points for Discussion/Response
1	2
“But the issue here is poverty, not gender equality”	Note studies on gender and poverty which show: <ul style="list-style-type: none"> <li>• a large proportion of the poor are women;</li> <li>• discrimination against women means that women face different barriers in coping with and overcoming poverty;</li> <li>• men and women have different coping strategies.</li> </ul> In this context, would a concept of poverty that did not pay close attention to gender have any validity?

<sup>80</sup> Catagay (1998), pg. 11

<sup>81</sup> adapted in part from J. Schalkwyk (2000), pg. 18

1	2
“Gender is not the only variable to be considered.”	We know that gender is an important variable, given the background information. Concepts of poverty that ignore gender would probably be incomplete and misleading.  Depending on the particular country, other factors such as race, ethnicity, religion, marital status or age may also influence capabilities and “who gets what” – these should also be included as a basis of disaggregation and analysis of poverty – but not to the exclusion of gender!
“But do we need such an explicit focus on gender when defining poverty – isn’t it already understood that men and women have different roles?”	If gender is not explicitly mentioned in concept documents or papers, what is the chance that it will be addressed in concrete programmes and activities?

## II. Measuring Poverty

### What is the Issue? What is the Goal?

How we define poverty will dictate the course of policy intervention. Similarly, the way we measure poverty will affect interventions and outcomes, as these measurements set the perimeters of our indicators, targets and goals.

One of the biggest and most basic problems here is the scarcity of data that is needed for a gender-based analysis of poverty. This includes a crippling lack of necessary economic and social data that examines the gendered nature of poverty, particularly in any way that is comparative over time. Moreover, a gendered analysis of the processes that lead to poverty and of coping and escape strategies demand not only social and economic indicators, but also qualitative data – of which we have even less.<sup>82</sup>

A gender-based analysis of poverty requires attention to the following issues when collecting the necessary data:

**Dimension of measurement** – To say that someone is “more poor” than someone else is neither precise nor particularly useful. For example, the claim is often made that women are “the poorest of the poor”<sup>83</sup>, yet this could mean a number of things. Measurements of poverty should therefore be specific and explicit about which dimension of poverty they measure:

- **incidence of poverty** – for example, more female-headed households than male-headed households fall below the government-delineated poverty line;
- **severity of poverty** – for example, the average amount by which female-headed households fall below the poverty line is greater than for male-headed households;
- **rate of increase of poverty** – for example, the number of female-headed households below the poverty line is increasing at a faster rate than for male-headed households.

*In every case, a gender perspective is required. At the same time, we should be wary of making widespread generalizations about the “feminization of poverty”, as studies show incredible diversity in the gendered nature of poverty, not only in different regions and countries, but also across social class and over the life-cycles of men and women.<sup>84</sup>*

**Households as a level of measurement** – Since the 1970’s, the household has most often been used as the unit of analysis for measuring poverty. While this has proved to be a useful and strategic starting point for understanding gender relations, the household approach neglects differences within households, and assumptions made about relationships within households greatly influence conclusions made about the nature of poverty.

<sup>82</sup> Razavi (1998).

<sup>83</sup> Platform for Action, International Conference on Population and Development (ICPD)

<sup>84</sup> Razavi (1998), pg. ii.

For example, analyses that presume households to be headed by “altruistic” males who “help guard families against crises and disasters” gendered power relations within households, where women may not benefit equally from resources and income, despite their equal or greater contributions in terms of reproductive labour. Alternatively, then, households can be understood as sites of production and redistribution.

Optimally, households should be analyzed as locations of both tension and cooperation, where the family is interpreted as a “contradictory institution through which power, affective relations, and resource distribution are played out at the micro level.”<sup>85</sup> However, the fact that individual levels of poverty cannot be determined from household surveys must nonetheless be taken into account, and alternatives should be sought.

**Methodology** - Both quantitative and qualitative methods are needed in order to provide a complete picture of how poverty is gendered. Disaggregating quantitative poverty statistics according to gender provides only a limited view of how women (or men) might be affected by poverty, as they most likely bypass crucial, but difficult-to-quantify dimensions such as stress, poor self-esteem and dependency.<sup>86</sup>

Similarly, household budget surveys, as mentioned above, generate easily quantifiable and comparable measures of poverty (income, expenditure, consumption), but still shed little light on differences in poverty between men and women within that household.<sup>87</sup> Therefore, this methodology should be fleshed out with case study material and qualitative surveys.

There are thus several **goals** to bear in mind in terms of measuring poverty:

- ensuring **gender-disaggregation** in the collection and presentation of data;
- using **complementary methodology** to reveal gendered aspects of poverty at both the household and individual levels;
- ensuring that a **gender framework** is used in the **analysis** of data.
- ensuring **other types of disaggregation** (by age, family status, ethnicity, geography, etc) in the collection and analysis of data that will elucidate differences among women and among men.

## Why Bother?

**Credibility and Accountability:** Given the widely documented evidence that shows how women and men experience and cope with poverty differently, any measurement of poverty that ignores a gender dimension ultimately lacks credibility and validity, and is most likely incomplete.

Furthermore, policy makers are accountable for funds they spend on measuring poverty – often substantial, given the sophistication of measurement and analysis required. They have a responsibility to measure and reflect the state and processes of poverty as completely and accurately as possible, which inevitably includes a gender dimension.

**Efficiency:** Women and men experience poverty in different ways. Unless these differences are measured, any initiatives designed on the basis of this data will not be maximally effective.

## Measuring Progress:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of qualitative data and indicators that measure poverty	Sectoral	If there is no qualitative data, it is likely that important gender dimensions will not be analyzed.	How well the qualitative data addresses and analyses gender	Review of data sources
Existence of poverty data disaggregation at the household level	Sectoral	Non-disaggregated household level data can not determine inequalities within households, which are likely to be gendered.		Review of data sources

<sup>85</sup> Beneria and Bisnath (1996), pg. 14.

<sup>86</sup> Beneria and Bisnath (1996), pg. 15.

<sup>87</sup> Razavi (1998), pg. 5

## Possible Interventions and Entry Points

- **Using a Multiplicity of Methods** – Policy makers should promote the use of both quantitative and qualitative methods when researching and analysing poverty, particularly from a gender perspective. A variety of methods will help to expose any bias, including gender bias, that may be inherent in any one particular method.
- **Participatory Poverty Assessment (PPA)**: This is a participatory research exercise, whereby poor people themselves suggest criteria for the analysis of poverty and themselves provide definitions of what it means to be poor. Because of the participatory nature of such an exercise, it can offer a more qualitative analysis of poverty, including gender dimensions, that are more likely to elude quantitative measurements. At the same time, such assessments can also be gender biased in terms of who can and does participate. The inclusion of both women's and men's views must be ensured.<sup>88</sup>

### III. Poverty Eradication Initiatives

#### What is the Issue? What is the Goal?

If the definition and measurement of poverty has included a gender dimension, it would seem logical that this dimension is reflected in design and implementation of poverty eradication measures. Unfortunately, this is not always the case. Crucial data which highlights the importance of gender is sometimes lost when it comes to concrete strategies and programmes. At the same time, because of the complex interplay of gender and poverty, “adding” a gender dimension to poverty eradication programmes is insufficient – a gender perspective must inform the design of any such programme from the outset.

Part of the problem is poor coordination between pro-poor and pro-gender equality initiatives. Despite the fact that innovative and progressive work may be underway in either area, the “cross-fertilization” does not always take place, leaving poverty initiatives blind to gender dimensions.

*Gender inequality does not figure prominently as a source of poverty in most poverty programmes assessed for [the UNDP Poverty Report 2000]. Yet there are stark gender differences in human poverty that urgently need to be addressed.<sup>89</sup>*

Furthermore, a review of poverty alleviation initiatives shows that when a “gender dimension” is added, it is almost always in the form of small-scale interventions targeted at women in general. These approaches have a variety of negative effects:

- they **marginalize** the issue of gender as something “separate”, instead of being an integral aspect of poverty-related problems and solutions;
- such small interventions most often can **reach only a fraction** of the target population (“poor women”);
- they are **limited in scope**, most often addressing women's practical needs without consideration of how social and economic institutions must be transformed in order to provide sustainable solutions to female poverty. They do not recognize unpaid reproductive labour as a barrier to women's full economic participation;
- the way in which gender roles and relations affect male poverty in **specific instances** (for example, amongst widowers) is not addressed.

In terms of gender equality, the **goal** in designing and implementing poverty alleviation programmes must be two-fold:

- to recognize and address the **different needs** of both women and men; and

<sup>88</sup> Catagay (1998), pg. 9

<sup>89</sup> UNDP Poverty Report 2000, pg. 94.

- to provide solutions which **challenge and transform** social, economic, political and cultural institutions that perpetuate both gender inequality and poverty.

## Why Bother?

**Accountability:** “Even when a country tries to implement economic policies to foster pro-poor growth and mount targeted poverty programmes, inept or unresponsive government institutions can nullify the impact.”<sup>90</sup> Poverty alleviation programmes which include strong accountability mechanisms and means of verification for the resources spent contribute to the promotion of good governance. The promotion of gender equality within poverty alleviation programmes must be part of what governments are held accountable for, as governments have the responsibility to eradicate human deprivation for *the entire* population.

**Sustainability:** While targeted interventions that help either men or women cope with poverty may provide some relief to hardship, sustainable and long-term solutions demand attention to the wider institutional context. Because higher incidence of poverty in female-headed households, for instance, is undeniably linked to social institutions and gender divisions in reproductive labour, poverty alleviation programmes that do not address the gender dimension will remain ultimately unsustainable.

**Quality of Life and Social Interdependence:** An understanding of gender roles and relations can help ensure that benefits of poverty alleviation strategies “trickle down” in households, thus helping prevent intergenerational reproduction of poverty. For example, as women are in some situations more likely to use a higher proportion of their earnings than men on children and household expenses, poverty eradication measures that specifically address the needs of women are more likely to have a positive effect on well-being for the entire family.<sup>91</sup>

## Measuring Progress

*\*Note that the “% of money devoted to specific interventions aimed at men or women” is unlikely to indicate how well gender has been mainstreamed into poverty programmes, as such “marginalized” activities may not be very effective in terms tackling complex gender problems (see above).*

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of indicators and means of verification included in poverty alleviation programmes that are gender-disaggregated	Sectoral	Can indicate a commitment of policy makers to measure gender impact of policies		Policy/ programme review
Participation of gender specialist(s) in policy design	Sectoral	Can indicate commitment of policy makers to include gender perspective in policy design	Extent and quality of gender-specialist impact; extent to which expertise was included in final policy	Process review
Difference in % of Female-headed households and % of Male-headed households that exhibit decrease in poverty.	National. Measure post-implementation and compare with pre-implementation data.	Whether programme or policy adequately addressed gender.		Poverty survey
Male:female ratio of beneficiaries of poverty alleviation programmes (including micro-financing, training, job creation, etc)	Project/ programme level.	Whether both women and men have been equally targeted and reached.		Programme evaluation.

<sup>90</sup> UNDP Poverty Report 2000, pg. 54

<sup>91</sup> Beneria and Bisnath (1996), pg. 14

## Possible Interventions and Entry Points

- **Inclusion of a Macroeconomic Dimension:** While targeted, micro-level interventions are vital for addressing strategic needs of both men and women, this approach is too narrow to cause any major shift in poverty trends, particularly in addressing causes of poverty. Macroeconomic policies have a profound impact on poverty, and must therefore be part of poverty alleviation solutions. Only once social justice and gender equality issues are integrated into macroeconomic policy content will sustainable outcomes for combating gender inequality and poverty (and the intersection thereof) emerge.

*LINK: See [MACROECONOMICS AND TRADE Gender Brief for further information.](#)*

- **Integrating Good Governance:** Sharing all information about the programme in a transparent manner (particularly regarding expenditures and outcomes) and holding public meetings to relay information about poverty alleviation programmes and promote social dialogue are two ways to bring issues of governance and poverty alleviation closer together. The way in which gender is addressed should always figure prominently in reports and other information on alleviation programmes – this will not only demonstrate accountability, but will also continue to raise awareness about the important links between gender and poverty.
- **Participatory Planning, Monitoring and Evaluation:** Ensuring gender balance of those involved in activities is an important first step for ensuring the integration of a gender perspective. In terms of poverty alleviation programmes, seeking the inputs of both poor men and women in designing initiatives, monitoring them and evaluating them will not only ensure that the voices of the poor are heard, but that differing needs and perceptions of men and women are considered.
- **Community and Household Mapping of Needs:** Determining community and household needs is mandatory for assessing practical and strategic needs of both men and women, and for providing data to help track progress. One helpful tool for achieving this is a mapping survey. For example, the Socio-Economic Needs Assessment of Households Survey<sup>92</sup> seeks inputs from both men and women at the household level to determine their different needs. (Remember that ex-post surveys must also be performed as a means of evaluating any projects)
- **Multiple, Complementary and Transformative Interventions:** As mentioned above, specific and small-scale interventions targeted at “women” in general often fail to produce sufficient and sustainable results. This does not mean that small-scale interventions should be eliminated, but rather that:
  - planners should be transparent and realistic about the expected outcomes and impact on the total poor population;
  - where possible, multiple and complementary targeted interventions should be planned (i.e. focussing on several different target populations of men and women with specific needs), to ensure greater impact;
  - targeted interventions should be “gender-proofed” to ensure that they do not perpetuate gender roles and relations that are partially responsible for poverty, i.e. women should not be overburdened or channelled only into “traditionally female” income-generating options, and more balance in reproductive labour must be sought.
- **Strategic/Practical Objectives Gender Audit:** (which Draft programmes should be reviewed and analyzed to determine the extent to which planned objectives are either “practical” or “strategic”. Too few strategic interventions indicates that the programme should be revised.

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<sup>92</sup> Tadjbakhsh (1995).

<b>PRACTICAL OBJECTIVES</b>	Meet basic, immediate needs of poor men and women (e.g. clean water, food, shelter)
<b>STRATEGIC OBJECTIVES</b>	Will contribute to transforming the institutions partially responsible for perpetuating both gender inequality and poverty.  This may include challenging gender stereotypes and traditional gender roles that make women particularly vulnerable to poverty (e.g. women's responsibility for reproductive labour).

*At the same time, the boundary between “practical” and “strategic” needs is often ambiguous. For example, addressing practical needs, such as improving income-generating opportunities, can often contribute to meeting strategic needs, as they may improve women's sense of self-worth, confidence, autonomy and financial independence. These are all important catalysts for changing social and economic institutional barriers to gender equality. Similarly, improving men's access to health services might lead to lower levels of depression and alcoholism – which could also help achieve the strategic gender goal of enhanced involvement of men in family life.*

## JUSTICE AND HUMAN RIGHTS

*This Gender Brief examines how a gender perspective can be integrated into justice systems and human rights monitoring and protection mechanisms. Gender mainstreaming not only strengthens the legitimacy of the state, but also enhances efficiency of governments and quality of life of the population.*

### I. National Legislation And Legal Rights

#### What is the Issue? What is the Goal?

Legislation (such as constitutional law, criminal law, civil law, labour law, regional or local ordinances) provides the basis of legal rights to gender equality. Laws in and of themselves are important as a statement of political will and a state's commitment to the principles outlined in that law. Furthermore, existence of legislation can draw attention to certain issues (such as gender equality) and serve as a catalyst for other types of changes.

A crucial fact: “Gender-neutral” (gender-blind) legislation does not result in the specific promotion of gender equality and the elimination of discrimination. For this reason, many countries have adopted legislation aimed at guaranteeing gender equality. Oftentimes, this a constitutional provision prohibiting discrimination on the basis of sex. However, while a constitutional provision can sometimes compensate for the lack of more specific legislation, practice has often showed that explicit and concrete attention to gender equality and gender-based discrimination is necessary for the true protection of legal rights to gender equality. Examples of legislation that more fully protects legal rights to gender equality include:

- general anti-discrimination law (of which gender-based discrimination is one aspect);
- specific sex discrimination bills;
- equal opportunities act, or more specifically – equal opportunities employment act;
- women's rights laws, often based upon CEDAW;
- local ordinances that implement CEDAW principles.

*These laws all have different focuses and represent a variety of approaches to gender equality law. It is important that countries adopt a model that is most appropriate to their specific needs and situation.*

Moreover, it is not uncommon to note contradictions between general constitutional provisions that “guarantee” gender equality, and other more specific laws, where specific instances of gender discrimination might emerge (for example, in regards to inheritance or property rights). Even more common are cases where certain laws indirectly

impede de facto equality (for example, laws on maternity and paternity leave or laws that restrict employment for women). This is why it is essential to apply gender analysis when drafting, passing and reviewing legislation.

Finally, special laws on specific gender issues may be necessary to attain full gender equality. For example, lack of legal provisions on marital rape and domestic violence do not afford full protection to a country's inhabitants, and is a barrier to gender equality.

The **goal** of gender mainstreaming in the context of legislation and legal rights is thus two-fold:

- to ensure that any **instances of gender discrimination** are **identified and removed** from existing legislation;
- to ensure that legislation on gender equality **offers adequate legal protection** from gender discrimination and **demonstrates strong political will** to promote equality.

## Why Bother?

**Justice:** Legal rights are obviously a question of justice. International human rights standards of gender equality (e.g. CEDAW) need to be enshrined in national legislation in order to provide better guarantees of implementation.

**Accountability and Credibility:** While a constitutional provision for gender equality may be sufficient in strict legal terms, the lack of more specific legislation may mean that governments lack political will to take gender equality seriously. Thus ensuring more specific legislative provisions on gender equality is a question of credibility and accountability of government.

**Efficiency:** Indirect discrimination, which can be the result of inadequate legal provisions, perpetuates *de facto* gender inequality – particularly in the labour market and family life. As demonstrated in other Gender Briefs (see, for example, MACROECONOMICS), *de facto* inequality is a significant barrier to the full economic and social growth of a nation.

**Quality of Life:** Legal protection directly influences men's and women's ability to fully participate in economic, social, political and cultural spheres of life.

*“Legal rights can enhance women's living conditions by legislating against gender bias in employment, discrimination in pay and incentives, and violence and harassment. Moreover, legal rights can contribute towards increasing women's capabilities by giving them property and inheritance rights, better access to credit and other productive resources, and increased political participation and representation.”<sup>93</sup>*

## Measuring Progress:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
1	2	3	4	5
Existence of constitutional provision on gender equality	National	Legal commitment to gender equality	How this provision is implemented or monitored.	Legislative review
Existence of specific anti-discrimination and/or equal opportunities legislation	National (could include local or regional level)	Indication of political will to implement CEDAW or constitutional provisions of gender equality	Effectiveness or degree of implementation	Legislative review

<sup>93</sup> GDP Learning and Information Pack, 2000.

1	2	3	4	5
If above-mentioned legislation exists, % of population that is aware of its existence	National	Indication of level of awareness of such law. Low levels of awareness most likely signal poor efforts to implement the law		Population-based survey

## Possible Interventions and Entry Points

- **Review of all legislation from a gender perspective:** This review (most likely to be carried out by a gender expert) should include the following questions:
  1. What specific provisions do or do not exist to explicitly protect individuals from discrimination on the basis of sex?
  2. Do laws exhibit direct discrimination on the basis of sex in the legislation? (i.e. where women or men are explicitly denied equal rights or opportunities).
  3. Do any laws exhibit potential for indirect discrimination on the basis of sex? (i.e. are any legislative provisions likely to result in discrimination against either men or women, due to the social roles and responsibilities they generally fulfil in society?)

*An analysis of potential indirect discrimination should also be on the alert for specific groups of men or women that may be discriminated against, e.g. mothers, fathers, young or old men or women, certain professions that are predominantly held by men or women, etc. A review of the effectiveness of implementation mechanisms and practical results can also be included here.*

- **Capacity building of legislation stakeholders:** Strengthening capacity of key partners who draft, review and pass legislation is critical to ensure that gender equality is adequately addressed. In particular, training or awareness-raising of the following groups should be considered:
  - parliamentary committees – to ensure that gender equality is adequately reflected in legislation that they draft or send to Parliament; to be alert to legislative gaps in the area which committees oversee in terms of gender equality; to be capable of introducing appropriate legislation to fill these gaps;
  - Parliamentary legislative department – to review and “gender proof” (see below) all legislation that is sent to parliament
  - Parliamentarians – to be able to critically examine legislation put before them from a gender perspective
  - Ministry or Cabinet legal department staff – to integrate a gender perspective into legislation sent to Parliament from the executive branch
- **Introduction of “gender proofing” procedures:** In order to ensure a gender perspective in any legislation that is passed, it may be helpful to introduce systematic procedures to “gender proof” this law. This could be:
  - the inclusion of a gender expert in the parliament’s legislative department, whose job it is to review of all legislation and prepare a statement on the law’s gender implications (including recommended amendments);
  - those who submit draft law to parliament should prepare a statement on the gender implications of the law as a mandatory part of its first reading in parliament.
- **Reference to CEDAW General Recommendations:** The General Recommendations issued by the Committee of CEDAW are a useful source for amending and updating legislation. These recommendations,

while not binding, suggest ways that the convention should be interpreted at the national level, and can therefore be used to enhance existing law or to draft new legislation.

## II. The Judiciary

### What is the Issue? What is the Goal?

While the judiciary is intended to administer the rule of law in a neutral, non-biased manner, judges are concrete individuals with their own value systems and interpretations. Even more significant is the fact that jurisprudence is constantly evolving – new laws are adopted and new legal precedents are set.

In terms of human rights law, it is also important to note that many states have only recently ratified major human rights conventions, so these important documents are only now becoming part of the human rights culture in many countries. Gender equality, as outlined in the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), national constitutions or other legislation, is particularly novel. This means that while laws and conventions may exist on paper, the judiciary needs time and support to be able to fully understand and incorporate the principles of gender equality into their judgements. The judiciary is therefore an important target for gender mainstreaming activities.

Moreover, **equal representation of men and women** in the judiciary is worth examining. Cross-country trends are not always similar – in some transition countries, for example, a high proportion of judges are female (this was a low paid and low prestige job during the Soviet era, when the judiciary played a very different role). In other countries, the highest levels of the judiciary are heavily dominated by men.

The **goal** of gender mainstreaming efforts in terms of the judiciary is two-fold:

- to promote and ensure **equal representation** of men and women in the judiciary;
- to enhance the **capacity** of the judiciary so that the **principles of gender equality** can be fully and effectively **integrated** into legal judgements.

### Why Bother?

**Justice:** Equal access to employment opportunities and appointments to the judiciary is a question of justice in itself. Any barriers to the equal representation of women or men – regardless of whether they are systemic or the result of gender roles and stereotypes – need to be addressed as a justice imperative.

**Credibility:** In order to be credible, the judiciary must be capable of objective and impartial judgement, according to the rule of law. However, this impartiality regarding gender justice may be hampered by lack of information on gender inequality and the pervasiveness of traditional gender roles. In order to guarantee this credibility, gender awareness, sensitization and appropriate training for the judiciary is necessary.

Gender balance within the judiciary – particularly in its highest positions – is also a matter of credibility. Because neither men nor women can be said to be “naturally” better administrators of justice, an imbalance in gender representation must point to barriers or discrimination at some level, which detracts from the institution’s credibility.

**Efficiency:** While gender equality is a question of justice and human rights, it is also a prerequisite for full social and economic growth. A well-trained, highly capable judiciary that is able to effectively uphold legal principles of gender equality is therefore a vital factor in the nation’s development.

**Alliances:** A state governed by the rule of law is the prerequisite for admission and membership in many international alliances and organizations. A judiciary that is prepared and willing to uphold some principles of justice but not others – such as gender equality – cannot be said to be fully governed by the rule of law.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:Female ratio of members of the judiciary	National Regional	Gender balance within the judiciary. High imbalance will signal the existence of barriers or discrimination somewhere in the system.	- The extent to which either female or male members of the judiciary have adequate capacity to uphold principles of gender equality. - The nature of barriers that may exclude one gender	Survey
Male: Female ratio of members of the state's highest judicial body (e.g. Supreme Court)	National	Gender balance within this body. It is an indication of discriminatory attitudes of the highest state powers, as positions in this body are often political appointments.	- The extent to which either female or male members of the judiciary have adequate capacity to uphold principles of gender equality.	Survey
Male:female ratio of beneficiaries of any judicial training or capacity building programmes	Programme level	Whether both women and men have been equally targeted and reached.		Programme monitoring and evaluation records.

## Possible Interventions and Entry Points

- **Capacity Audit of Judiciary:** A special survey can be commissioned (or undertaken by the Ministry of Justice, for example) to assess the degree of capacity of the judiciary on gender equality issues. Judges (or lawyers, or law-school graduates) could be interviewed or asked to fill in a questionnaire that would assess their familiarity with CEDAW and with case law on gender equality, and which could indicate their willingness to have additional training. Note that specific methodology would need to be designed.
- **Integrating gender into judicial training** – Judicial training on CEDAW, gender equality provisions in the constitution and other laws pertaining to gender equality will build capacity in the judiciary. Examples of the way other states have effectively used CEDAW in interpreting national law can be particularly useful. For example, experience in other countries has shown that vague or inadequate constitutional guarantees can be enhanced by references to CEDAW.<sup>94</sup> Such training can take a variety of forms:
  - **in-service training** (courses, seminars, conferences, work-study tours, participation at national events on gender and law)
  - inclusion in **law school curriculum** (courses on gender equality, mainstreaming of gender equality issues into other courses)

<sup>94</sup> “Brining Equality Home”, ed. I. Landsberg-Lewis, UNIFEM

### III. International Human Rights Obligations – Monitoring And Reporting

#### What is the Issue? What is the Goal?

Many states have formal obligations as part of an international human rights community to promote and protect human rights related to gender equality. The Convention on the Elimination of All Forms of Discrimination against Women, or CEDAW, is often referred to as the most concrete and explicit international mandate in this regard.

However, experience around the world has shown that the mere ratification of a treaty does not mean that its principles will be adopted into national legislation or implemented “de facto”. For this reason it is crucial that effective implementation and monitoring mechanisms are established. Periodic reporting to international convention committees is one means of monitoring on fulfilment of commitments, but back-logs within these committees can mean that this mechanism plays more of a formal role than a practical one. Nonetheless, the mechanisms that countries establish for monitoring and reporting can have great added value at the national level.

At the same time, monitoring and reporting on conventions is rarely “integrated” – while reporting to the CEDAW committee will obviously look at gender equality, reports to other committees (regarding Convention on the Rights of the Child, for example) often side-step the issue of gender equality altogether. Additionally, reporting to CEDAW and other convention committees needs to move beyond a “formalistic” account of legislation to a report on “de facto” fulfilment of commitments as well.

The goal of gender mainstreaming here is therefore:

- to ensure the **systematic and full integration** of gender issues into **monitoring and reporting** mechanisms on **all** international human rights obligations.

#### Why Bother?

**Efficiency:** Implementation and monitoring of the Women’s Convention is made much more efficient if the links between its provisions and those made in other conventions are made explicit from the outset.

*Furthermore, monitoring and reporting mechanisms focus on accountability for failures within a social system (in our case, the failure to ensure gender equality). This means that the goal of “protection of rights” and the goal of “human development” are mutually reinforcing, and attention to rights actually enhances social and economic growth.<sup>95</sup>*

#### Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of convention reports that include attention to gender equality	National	Degree to which a mainstreaming approach has been adopted		Report review
Resources (human, time and financial) devoted by the government to reporting on CEDAW, in comparison to reporting on other UN conventions.	National	Priority of CEDAW reporting in comparison to other conventions.	Quality of reporting.	Audit of convention reporting process. (NOTE: if governments provide support to NGOs in creation of alternative reports, this should be included).

<sup>95</sup> UNDP Human Development Report, 2000. pg. 21

## Possible Interventions and Entry Points

- **Integration of a gender dimension into ALL convention reporting – not only CEDAW:** This may be accomplished by inviting a gender expert or members of non-governmental organizations to provide inputs or comments to all draft convention reports from a gender perspective. Means of achieving this could include:
  - establishment of multisectoral working groups on gender for the purpose of greater transparency and information-sharing in the preparation of reports;
  - establishment of databases that can be cross-referenced for issues that pertain to more than one convention – such as gender equality!
- **Review of Reservations:** *Governments should review any formal reservations they have submitted to CEDAW or other conventions, to ensure:*
  - *that these reservations are not incompatible with the object and purpose of the convention;*
  - *and*
  - *if they were entered because of insufficient national legislation or policy, that appropriate steps are being taken so that reservations can be removed.*
- **Support to the non-governmental sector and to the preparation of shadow-reports for UN committees:** Non-governmental organizations (NGOs) often prepare “shadow reports” for convention committees, as they may feel that official government reports do not adequately or accurately represent the situation. Policy-makers should not perceive this as a threat, but rather as a way of enhancing participatory governance and dialogue with NGOs. Governments can support these efforts by providing all necessary information and documentation on request, agreeing to interviews, etc.. Such cooperation will also enhance the credibility and quality of the shadow reports.

## IV. Protection And Complaints Mechanisms

### What is the Issue? What is the Goal?

Once awareness is raised about the legal right to gender equality, a problem may arise: individuals are more aware of their rights, but they may not know how to practically exercise these rights. Information must therefore be provided on possibilities for filing complaints, while the capacity of complaints mechanisms must be simultaneously strengthened to meet growing demand.

Common types of institutions that are charged with the mandate to hear complaints on gender discrimination include:

- **Ombudsperson** (either a general ombudsperson or a specific ombudsperson for gender equality);
- **National Human Rights Office;**
- **regular court system** (local, district, federal or constitutional courts).

However, certain barriers may exist regarding use of these institutions and mechanisms:

- The capacity of such institutions or mechanisms may be limited, and therefore “more serious” or “top priority” complaints may take precedence. Because of low levels of awareness about the nature and effects of gender-based violations, the seriousness of these violations may not be recognized. Gender-based violations against men may be scorned or not taken seriously by human rights workers;
- Women or men may face time or financial constraints that deter them from filing complaints. Even if services are free-of-charge (and not all are), transportation costs, costs of a child-minder, and taking time off work may act as disincentives;
- Women and men may experience significant psychological barriers to filing complaints. For example, the failure of previous cases, or the lack of precedent on gender-based cases altogether, will raise doubt about their chances of success;

- Women and men may fear repercussions from their spouses, families, communities and employers. They may not feel that the direct benefits to them are worth the risks.

The **goals** in terms of protection and complaints mechanisms are therefore:

- to ensure a strong **mandate** and adequate **capacity** of human rights protection institutions to address gender equality claims;
- to ensure **equal access** of men and women to protection and complaints mechanisms and institutions.

## Why Bother?

**Justice:** Equal access to protection and complaints mechanisms for both men and women, and for victims of all types of human rights violations must be guaranteed. Alternatively, the protection system itself can be in violation of basic human rights.

**Credibility and Accountability:** The credibility of human rights commitments made by governments is seriously compromised if effective and efficient means to ensure protection against violations are not provided. Furthermore, without such accessible mechanisms, those responsible for violations cannot be held accountable. This again damages the credibility of the state's commitment to human rights.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of complaints received by National Human Rights Institution (or ombudsperson, etc) that deal with gender discrimination*	National	Can indicate: - level of awareness about the mechanism; - level of trust in the system and its efficacy	It is unlikely to provide a true indication of the actual number of violations	Records
Average time and cost to an individual wishing to pursue a complaint by available mechanisms, disaggregated by gender	National	How accessible the system is, noting differences between men and women	Does not identify specific access barriers	Survey

\* specific criteria need to be articulated so that cases of gender discrimination can be objectively identified.

## Possible Interventions and Entry Points:

- **Promotion of Legal Literacy:** Various steps should be taken to ensure that both men and women from all parts of society are acquainted with their rights and responsibilities, and that they are aware of mechanisms intended to help protect these rights. This information should include specific details about procedures and mechanisms for filing complaints or seeking counsel. Specific interventions might include:
  - “Know your rights” popular awareness campaigns: These use television and radio media and the production of special pamphlets and brochures that focus on different aspects of human rights and gender equality;
  - Integration of human rights education in schools (for example, in civic education, social studies and political science classes).
- **Gender-sensitivity training for all staff people at human rights protection institutions:** It is generally not adequate to have just one “gender rights specialist” working in institutions such as human rights offices or ombudsperson offices. This is because people submitting complaints are likely to be “filtered” through other staff members first – the person answering the phone, the receptionist, the assistant rights

officer, etc.. It is vital that all staff people share a commitment to and understanding of gender equality, so that the entire process is made accessible to those people with complaints of gender-based violations.

## SCIENCE, RESEARCH and INFORMATION AND COMMUNICATION TECHNOLOGIES (ICT)

Sound policy relies on sound research, data and analysis.

Furthermore, the rapid development of new information and communication technologies (ICTs) is changing the way that governments, the private sector and civil society all conduct their daily business. Science, research and ICTs are often considered highly “technical” subjects (better left to the “experts”), but in fact they affect public policy (and the lives of individual men and women) in many elementary ways. This Brief considers ways to gender mainstream in these sectors.

### I. Gender as a Scientific Variable

#### What is the Issue? What is the Goal?

Powerful critiques have recently emerged that expose a variety of gender biases in research, in both the social and natural sciences.<sup>96</sup> These biases often stem from the failure to address gender as an important scientific variable. The result of such bias is not only flawed research, but ineffectual interventions designed on the basis of this research. These biases can take a number of forms:

- In the **natural sciences**, failure to include a gender perspective in research design may mean that differences between male and female research subjects are overlooked. For instance, pharmaceutical research that once proclaimed certain drugs to be safe for women is now being reconsidered, as clinical trials were only performed on men.<sup>97</sup>
- In the **social sciences**, a biased understanding of gender roles and responsibilities will also lead to bias in the design of research projects and their results.

This is important for policy makers, as it is upon this research that they base their policies and programmes. Policy makers need to be capable of evaluating the credibility and accuracy of research presented to them. Furthermore, governments, via various science and research councils, sponsor a significant amount of the research produced. Steps should be taken to ensure that gender as a scientific variable is taken into account when evaluating research proposals.

The ultimate **goal** is thus:

- ensuring the inclusion of gender as a scientific variable as a **criterion** for evaluating the soundness of research proposals and research projects.

#### Why Bother?

**Credibility:** Science that examines both the male and female perspectives is better science. Any scientific examinations or investigations that exhibit a gender bias in setting the research question, in collecting and interpreting data is ultimately flawed, and thus discreditable science.

**Accountability:** Both those conducting and commissioning government-funded research must be accountable for any public funds disbursed. Taking measures to eliminate gender bias helps ensure that the research is credible, effective, and ultimately beneficial to the *entire* population – i.e. both men and women.

<sup>96</sup> See for example *Feminism and Science* (1996, eds Evelyn Fox Keller and Helen Longino) and *Missing Links: Gender Equity in Science and Technology for Development* (1995, UN Commission on Science and Technology for Development).

<sup>97</sup> Soon-Young Yoon (1995), pg. 135.

**Efficiency and Quality of Life:** Science that takes into account a gender perspective helps avoid costly policy interventions based on incomplete (gender-biased) research. Moreover, science which recognizes and analyses the different needs and situations of men and women will undoubtedly lead to better lives for both genders, as these interventions will be better targeted and thus more effective.

## Measuring Progress

Indicator	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of state-funded research projects that present data disaggregated by gender	National	Extent to which gender as a scientific variable is taken into consideration in approving research projects		Desk Review
Ratio of men:women in National Research Council (or equivalent)	National	Gender balance in evaluation of proposals and disbursing grants	Women may not necessarily have gender-based analytical capacity	Council records
% of budget expenditure on state funded projects that were: – explicitly focused on gender analysis – included appropriate consideration of gender dimension	National	Financial commitment to improving research and information base on gender-related issues.	Quality of funded research.	Review of research and budgets.

## Possible Interventions and Entry Points

- **Using Gender Expertise:** A gender expert should be included on any boards or panels that evaluate research proposals and make decisions on grants. This expert can alert you to any potential gender biases evident in the research proposal or which may be present in research findings. This expertise will also enhance the gender mainstreaming capacity of other members of the panel.
- **Promotion of multiple research methodologies:** When a variety of methods are used to collect and analyze data, there is a better chance of exposing bias – including gender bias - inherent in any one method or research technique. For example, complementing quantitative data collected by questionnaire with qualitative data collected in semi-structured focus group interviews may reveal different aspects of one research question. Thus both designers and commissioners of research should consider a variety of research methodologies as a means for instituting “checks and balances” in the research process.
- **Involvement of multiple stakeholders:** Ensuring a gender balance and a variety of stakeholders when designing research can help expose bias at the conceptual level of the research proposed. Similarly, multiple stakeholder analysis of data will provide a variety of perspectives, which will help guard against bias in the interpretation of research findings.

## II. Statistics

### What is the Issue? What is the Goal?

Statistics are an integral part of the research process. While statistics can never provide a complete picture of any given situation, they are invaluable in terms of providing quantifiable, comparable data both between populations and over time. In terms of gender equality, statistics that are disaggregated according to gender clearly indicate any major discrepancies that exist between the status and men and women, and allow for the tracking of any changes in these differences.

However, statistics are about more than the numbers themselves. The conceptual categories used in gathering statistics will dictate what sort of picture emerges from the numbers. For example, census and national accounting methodologies on incomes for the most part exclude production that is not traded on the formal market – this often results in the exclusion of women’s production of goods for their families’ consumption or for informal trade.<sup>98</sup> As a result, women are underrepresented in the economically active population. Furthermore, certain techniques may fail to collect complete information from either men or women. For example, women are often reluctant to provide any information on domestic violence except in in-depth interviews that establish confidentiality and trust, in a setting where family members will not overhear.

Similarly, the interpretation of statistical data is susceptible to gender bias which can prevent one from drawing credible conclusions. For example, a higher incidence of preventable disease in single men over 40 could be interpreted as men’s neglect of their own health - a presumption based on the stereotype that men do not look after themselves. On the other hand, the data might reflect gender-bias in the health care system, which may primarily target preventive care at women of that age, thus failing to provide an equal amount of information to men.

Thus the **goal** of policy-makers needs to be four-fold:

- all statistics that are collected need to be **disaggregated according to gender**, amongst other categories (rural/urban, socio-economic standing), and presented in such a way;
- **conceptual frameworks** governing data collection need to be “gender-proofed” against bias in the way they are designed;
- data collection **methodology** must be tested to ensure that collection of data is gender-sensitive;
- **interpretation** of data must also be proofed against gender bias.

## Why Bother?

Arguments for gender-mainstreaming in statistical collection and analysis are similar to those used for integrating gender into research more broadly (see **I: Gender as a Scientific Variable** above): data that is not gender-disaggregated is not credible, and thus any actions or policies based upon such data is not an efficient use of resources, and may not bring benefits to the necessary target population.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
% of statistics disaggregated by gender in annual national statistical bulletins	National	Efforts by national statistical office to present statistics disaggregated according to gender	Gender disaggregation in <i>collection</i> of data	Desk review

## Possible Interventions and Entry Points

- **Gender Audit of National Statistical Office Publications** – Data provided on a regular basis by the national statistical office should be reviewed, noting the extent to which statistics are gender-disaggregated. If necessary, make a formal request for the presentation of all data to be disaggregated according to gender.
- **Inclusion of Gender Expertise** - Major statistical projects (e.g. time-use surveys, labour force surveys, living conditions surveys) should include a gender expert as part of the team. Perhaps you can assist in drafting the Terms of Reference or recruiting a suitable expert.

<sup>98</sup> Alison Evans, (1992) pp. 12-13

- **Training** – Training workshops can be organized for select individuals involved with statistics production and use for the purpose of enhancing skills for integrating a gender perspective in statistics collection and analysis.

### III. Information and Communication Technologies

#### What is the Issue? What is the Goal?

In an increasingly globalized world, many experts have highlighted the revolutionary potential of new information and communications technologies (ICTs). Some liken the communications revolution to the industrial revolution, and highlight the potential of the internet in particular. Given this significance, it seems obvious that those shut out of these new developments have much to lose.

Unfortunately, figures from around the world show alarming gender gaps in the use of the internet: for example, National Internet surveys in 1998 and 1999 revealed that women made up only 38% of internet users in the US, and only 16% of the internet users in Russia.<sup>99</sup>

However, this is more than a simple question of attaining gender balance amongst users of new ICTs. These technologies are not an end in themselves, but rather an important tool and a key that can unlock many doors, for example to parts of the labour market, to new information, to education, to the ability to connect and communicate with the entire world. Policy makers should thus ensure that this tool is made equally available to both men and women.

At the same time, it is crucial to bear in mind that ICTs are not autonomous, but rather can only function within already existing social, economic and political systems. In terms of promoting human development, then, new ICTs as a tool are only as effective as the way in which they are used, and by whom. Because research has pointed to differential impact of ICTs on certain segments of the population<sup>100</sup>, it is crucial to remember that the values and principles governing the ICT sector also need to be examined from a gender perspective.

For example, research shows that women in ICT companies are paid less, have lower status and are in much lower-level positions than men. Women are thus largely excluded from making decisions about how and in the interest of whom the industry will develop. Unfortunately, evidence also shows that ICT workplaces are not friendly to women: employment practices are not equitable and dominant values marginalize women as well, leading to much lower retention rates of women as compared to men in ICT jobs. Policy-making and other interventions must therefore be used to foster an ICT sector that is equally favourable to men and women.

In sum, the **goals** pertaining to this sub-sector are:

- provision of **equal opportunities** for men and women to acquire and use skills associated with ICT
- development of policies that ensure that social justice, including gender equality, govern the **development of the ICT sub-sector**

#### Why Bother?

**Efficiency:** As a tool, new ICTs offer many possibilities for making our lives more efficient and thus for increasing the prosperity of the nation. However, if this development does not proceed in a gender-balanced manner, existing gender gaps in terms of poverty, or accessibility to the labour market, may widen. These barriers could in turn deter progress and prosperity in the nation as a whole, as the full productive potential of the population would not be realized.

**Chain Reaction:** ICTs offer a new way of doing business. Flexible working regimes and opportunities for “telecommuting” (working from home with the aid of electronic communications) provide new possibilities for both men and women to balance reproductive work with productive work. This means extended choices

<sup>99</sup> Human Development Report, 1999. UNDP. pg. 62

<sup>100</sup> G.M. Marcelle. “Transforming Information and Communication Technologies for Gender Equality.” UNDP Gender and Development Monograph Series No. 9. UNDP, 2000.

for couples in negotiating this tricky division of tasks. The result might mean more gender equality in both reproductive work and the paid labour market (see **LABOUR** Gender Brief).

Moreover, ICTs offer new possibilities for economic regeneration in underdeveloped regions of the country – rural regions hit hard by agricultural reform, for example. Again, however, care must be taken to ensure a gendered approach to these activities, so that gender gaps in unemployment and poverty are not exacerbated.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of internet users	National	Gender gap in use of one representative ICT	Cause of gap: accessibility, skills, or interest?	Surveys
Ratio between male and female students enrolled in ICT departments at universities or vocational schools	National	Gender gap in the professional pipeline for ICT jobs	Cause of gap	Enrolment records
Male:female ratio of beneficiaries of state, municipal or donor-funded ICT capacity building projects	National	Whether men and women are being equally targeted for ICT skills capacity building	Cause of gap	Records
Ratio between men and women employed in ICT sector	Sectoral	Gender gap in ICT professions	Cause of gap; Vertical segregation between men and women in the ICT sector (i.e. managers vs. assistants, technical personnel)	Labour force survey
Difference between male and female retention rates in middle and upper management ICT jobs	Sectoral	An indication of the extent to which the ICT sector provides appropriate working conditions for women and men, and can point to gender-insensitive work environment	Specific reasons for leaving (reasons may be positive, e.g. better job as well as negative, e.g. harassment in the workplace)	Surveys of the ICT sector

## Possible Interventions and Entry Points

- **Gender Impact Assessment of ICT policies** - A review of policy governing the ICT sector should be conducted, which can identify: (1) any barriers to achieving gender equality in the ICT sector; and (2) potential entry points for enhancing gender equality. Attention should also be paid to the extent to which social justice, including gender equality concerns, are integrated into policies regulating the development of the sector as a whole. An expert with both gender and ICT expertise can be hired to undertake this assignment.
- **Increasing Access** – If data shows that there are large gender gaps in male and female internet use, or that current policies result in hidden discrimination against women or men due to cost of services, location and availability of free or discounted internet access, policies that promote more equitable access should be developed and implemented.
- **Awareness campaigns** – Part of the problem with new ICTs is the enormous psychological barrier they represent to many people, particularly amongst older generations. ICT policies should therefore be sure to include information campaigns that are aimed at demystifying these technologies for audiences who

are reluctant to embrace them. Further more, training schemes with strong “outreach” components should be implemented.

- **Promoting Education and Training Opportunities** – Education and training programmes should be offered that are geared specifically towards populations who have so far been reluctant to embrace ICTs. Such programmes should emphasize the practical application of ICT tools. This can be achieved by integrating ICTs into other types of training, so that they do not remain a “stand-alone” end in themselves. These could include: internet for business networking; website design for the promotion of NGO or community activities; e-commerce for marketing and selling locally produced goods, etc..

- **More Gender-Aware Research on the ICT Sector** - Ministries and departments should cooperate with researchers to learn more about gender dimensions of the ICT sector. This could include production of more detailed quantitative data on numbers of men and women employed in different parts and at different levels of the industry, as well as sociological surveys on men’s experience working in this sector as compared to women’s. Gender audits of employment practices and policies in the sector and their differential impact on men and women could also be undertaken. The results of this research should feed back into policies that help redress adverse gender effects.

#### IV. Careers in Science and Technology

##### What is the Issue? What is the Goal?

Data from around the world show that consistently lower numbers of women are employed in fields of science and technology (S&T), particularly in prestigious positions. Low levels of women in S&T jobs are obviously linked to the education and training they receive before entering the labour market. However, cultural stereotypes regarding “female” and “male” professions or suitable spheres of activity can also fuel discrimination against women trying to enter scientific or technological professions. Furthermore, contributions and capabilities of women may be rendered “invisible” because of male bias in this sector.

*By the early 1990’s, only 9 women had won the Nobel Peace Prize in science subjects, compared to over 300 men. Similarly, in 1993, the American National Academy of Sciences had 1750 living members, only 70 of whom were female. Data in developing countries points to an even higher degree of exclusion of women.<sup>101</sup>*

The **goal** here is thus two-fold:

- promoting **gender balance** within scientific and technological careers through policy making and other interventions;
- **valuing contributions** from both men and women in this field equally.

##### Why Bother?

**Justice:** One important but often overlooked argument for bringing more women into the S&T professions is the fact that science is often *about* women. The most obvious example here are new reproductive technologies, including contraception and assisted pregnancy technologies. It is only ethical that women be involved in and

<sup>101</sup> E. Rathgeber. “Schooling for What?” Missing Links.

share control over the development and use of technologies that profoundly affect their lives. If women are to be the objects of scientific study, they should be the subjects performing this study as well.

**Credibility:** More women in S&T jobs means better science. This is because a *multiplicity of perspectives* (in this case, the perspective of both men and women) can serve as a system of “checks and balances” against subjective opinions and values, which inevitably play a role in all scientific investigations.

**Efficiency:** Opening up science and technology career opportunities to women can help redress occupational segregation within this sector, thus leading to a more efficient labour market (see Gender Brief on **LABOUR: Occupational Segregation.**)

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Ratio between men and women employed in S&T professions (e.g. engineering)	National	The gender gap in S&T employment levels	discrepancies in the level, status and pay of men and women in these jobs	Labour force survey
Ratio between male and female students enrolled in S&T departments at universities or vocational schools	National	Gender gap in the professional pipeline for S&T jobs	Cause of gap	Enrolment records

## Possible Interventions and Entry Points

- **Intervention through the Education System** - Efforts should be made to promote gender balance in the “pipeline” leading to S&T jobs. This involves actively encouraging girls to pursue S&T studies, eradicating sex-based stereotypes in the classroom and training teachers to be more sensitive to such issues. See Gender Brief on **EDUCATION** for more details.
- **Awareness-Raising Campaigns** – The achievements of women in the field of science and technology should be recognized, for example through specific campaigns or honours/awards. These can be organized in cooperation with women and science NGOs, the Academy of Sciences or other civil society groups.

## MASS MEDIA

*This gender brief examines how gender mainstreaming is relevant to production, dissemination and use of print, radio and television mass media.*

*While media cannot be held responsible for the actions, attitudes or behaviour of individuals, media is irrefutably powerful in shaping public opinion, bringing new issues or perspectives to light, and defining the terms of public debate. While policy makers within a democracy do not (or should not) control the media, they can take actions to promote gender mainstreaming within media outlets. This should include attention to representations of gender roles and stereotypes, as well as access and structural issues within media outlets and companies, such as participation of men and women, censorship and licensing.*

[LINK: See Gender Brief on SCIENCE, RESEARCH AND TECHNOLOGY for an analysis of gender mainstreaming and internet-based media \(new information technologies\).](#)

## I. Reflection of Gender Roles and Stereotypes

### What is the Issue? What is the Goal?

Media play a crucial role in **reflecting gender roles and stereotypes**: this is perhaps the most important reason for gender mainstreaming in this sector. The perpetuation of negative or stereotyped images of women and men, particularly in the media, “does not provide an accurate or realistic picture of women’s and men’s multiple roles in and contribution to a changing world,” and that the elimination of societal stereotypes is “paramount for the establishment of gender equality.”<sup>102</sup> This is because gender stereotypes can restrict social, political and economic opportunities for both men and women. This issue concerns both the *producers* of media content, as well as its *users* of media.

#### PRODUCERS OF MEDIA CONTENT:

Producers of the media can control how men and women are portrayed in the media – these portrayals can either enforce negative gender stereotypes or challenge them. For example, prominent female and male politicians are often portrayed in very different ways: Aggressive political tactics on the part of men can be described as “decisive” and “displaying strong leadership qualities,” while such behaviour in women is often portrayed as unbecoming. Furthermore, media tend to focus heavily on the physical appearance of female politicians and their “emotional” side.

While censorship is clearly a violation of the right to freedom of expression (see part II of this Brief - Media Control, Participation and Access, below), **content regulation** remains a matter of **editorial policy**. Editors have a great amount of power and influence in determining what “slant” or perspective will be adopted when covering stories. They also determine the prominence of issues within their media outlet. These questions are often guided by either informal or official editorial policy. Unfortunately, a commitment to furthering gender equality and eliminating negative gender stereotypes is rarely a part of such policy, and experience shows that without an explicit commitment to gender equality issues, they are readily undermined. Use of **non-sexist language** is another issue that can be regulated by editorial policy.

At the same time, the **ethics of journalists** themselves can affect the perpetuation of negative gender stereotypes. For example, the way in which journalists report on issues like domestic violence and sexual assault can perpetuate myths, for instance that a woman is responsible for sexual violence perpetrated against her. This is an issue that needs to be addressed not only within the journalist profession, but also in journalism training (i.e. colleges and universities).

**Regulation of advertising** raises similar issues. Editorial boards often have policies that restrict some types of advertising (including classified ads) that their media will run. Governments, as well, can impose advertising restrictions – for example, some governments have restricted where and how ads for cigarettes or alcohol can be featured, in the name of public health. Similar approaches could be adopted for promoting gender equality.

At the same time, **advertising companies** themselves wield considerable power in enforcing gender stereotypes or challenging them. Unfortunately, at present advertisers seem to enforce more stereotypes than they break down. For example, ads for household products will feature women, while ads for business or financial services will feature men.

#### USERS OF MEDIA:

While media outlets make most decisions about how genders are portrayed, this issue also needs to be addressed by people who use the media to disseminate information or opinions. Governments in particular should therefore become aware of the way they themselves promote or enforce gender stereotypes through the **information that they channel through or feed to the media**. This concerns public service announcements, informational campaigns, political campaigning, and general reflection of government policies and action in media releases and press conferences. For example, highlighting the important role of women politicians in areas of finance, economics and multilateral diplomatic negotiations can help challenge existing stereotypes.

Government-appointed panels that serve as **media watchdogs** (to ensure that media regulations and standards are being implemented), can also play an important role in identifying and monitoring gender stereotypes and discrimination in the media, as well as the use of non-sexist language.

<sup>102</sup> Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions, “Towards a Community Framework Strategy on Gender Equality, 2001-2005” (2000/0143 (CNS))

The goal in relation to gender roles and stereotypes within the media is thus:

- to promote the **integration of a gender perspective** into the **production** and **use** of media, for the ultimate goal of:
- **eliminating gender stereotypes** as a **barrier** to the **full participation** of men and women in all aspects of economic, political, social and cultural life.

## Why Bother?

**Justice:** The elimination of negative gender stereotypes is in and of itself a human rights obligation: Article 5 of CEDAW calls on States parties to take appropriate measures to eliminate prejudices and practices based on stereotyped roles of men and women.

**Credibility:** If media outlets do not actively promote gender equality (i.e. do not adopt this as a policy), it can be said that they are in fact promoting gender discrimination. Those media outlets that are transparent about their policies on this issue are more credible.

**Efficiency:** Gender equality is a cornerstone for the full social and economic development of a nation, and media can be a very efficient tool in strengthening gender equality, and thus for promoting social and economic development.

**Alliances:** For those states seeking membership in the European Union, it is important to note that that one of the five strategic objectives of the Commission for promoting gender equality is to promote change of gender roles and stereotypes, and media is specifically mentioned as one area of focus.<sup>103</sup>

**Chain Reaction:** Because media brings issues to the attention of the public and often sets perimeters of public debate, media can be a useful tool in actually solving various gender-related problems in a wide number of sectors and policy areas. It is therefore crucial to ensure a gender perspective in the way media is deployed.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
1	2	3	4	5
Number of articles in major newspapers explicitly addressing gender equality issues*	National or local. Measure on an annual, monthly or weekly basis and compare over time. Increase indicates success.	Editorial and journalistic attention to gender issues (newspapers).	Quality of reflection of gender issues.	Content analysis of major newspapers**
Number of articles in major newspapers (or magazines, or television news programmes) that promote blatant gender stereotypes*	National or local. Measure annually and compare over time. Decrease indicates success.	Success of editorial policy on gender issues. Long-term longitudinal comparison may indicate shift in public opinion on gender stereotypes.		Content analysis of major newspapers (or magazines, TV news programmes)**

<sup>103</sup> Communication from the Commission to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions, "Towards a Community Framework Strategy on Gender Equality, 2001-2005" (2000/0143 (CNS))

1	2	3	4	5
Number of editorial boards of media outlets that include issues of gender equality in editorial policy.	National. Compare numbers over time. Increase indicates success.	Political will and commitment on behalf of editorial boards to promote gender equality. May indicate success of Gov't/NGO campaigns for media to develop such policy.	Extent and effectiveness of implementation of such policy.	Survey of media outlets.
Number of editorial boards of media outlets that include statement on gender equality in regards to advertising standards	National. Compare over time. Increase indicates success.	Political will and commitment on behalf of editorial boards to promote gender equality. May indicate success of Gov't/NGO campaigns for media to develop such policy.	Extent and effectiveness of implementation of such policy.	Survey.

\*specific methodology for collecting such information through content analysis would need to be developed. See “Possible Interventions and Entry Points” below.

\*\*could be done in cooperation with University, NGO, or media expert. See “Possible Interventions and Entry Points” below.

### Possible Interventions and Entry Points

- **Integration of gender issues into media policy:** Policy makers should encourage media outlets to include statements on gender equality into editorial policy, ethics codes and advertising policies. Policy makers could, for example, provide a sample policy to all media outlets and invite them to adapt and adopt it. A sample policy should include clauses on non-promotion of gender stereotypes and use of non-sexist language.
- **Inclusion of gender specialist in media regulatory bodies or “watchdog” panels:** A gender specialist on such a panel could make an important contribution to monitoring gender stereotypes in the media. Furthermore, such a specialist can help to build gender-sensitivity capacity within such bodies. Alternatively, monitoring of gender stereotypes and discrimination within media should be explicitly included in the Terms of Reference of such panels or bodies.
- **Content Analysis:** Content analysis can systematically analyze how gender is portrayed within media. Separate analyses can be done for print news media, radio, television, magazines, etc.. Governments can cooperate with journalism faculties at colleges or universities, or with NGOs, who can then actually perform this analysis. Alternatively, media experts can be hired.  
*Such analysis would provide important data for tracking progress (see indicators above). However, generation of reliable and comparable data requires development of specific methodology that provides clear criteria for identifying what a “gender issue” or a “gender stereotype” is (this could be open to subjective interpretation).*

Content analyses of advertising can also be conducted, although methodology would have to be very sophisticated, as it may be difficult to readily distinguish between irony/satire as an advertising tool on the one hand, and unconscious promotion of stereotypes on the other.

- **Review and Analysis of Government Use of Media:** A study can be commissioned to analyze attention to gender equality issues and the promotion/challenge of gender stereotypes in government public service

announcements, information campaigns, political campaigns, media releases, etc.. Results of such a study should form the basis for training government media relations staff (see Training directly below).

- **Gender Issues Training and Awareness Raising:** Training can be conducted at various levels and with various audiences with the goal of improving the reflection of gender issues and stereotypes within the media. Examples of such training include:
  - **Awareness-raising for Editorial level staff:** Issues covered could include how to recognize negative gender stereotypes and their effects. Training on the development and implementation of gender-sensitive editorial and advertising policy would also be helpful. For example, some publications print a column on “safety tips” beside personal ads/dating ads. A similar warning and concrete advice could be placed near ads advertising work and study abroad as a prophylactic measure against trafficking in women.
  - **Training for Government spokespeople and press secretaries:** People within government who provide information to the press should be trained to recognize gender stereotypes and to offer concrete examples to the press that challenge negative stereotypes.
  - **Capacity building for Advertisers:** Advertising companies could be encouraged to “innovatively” challenge gender stereotypes in a way that is to their own (and their client’s) advantage. This too would involve awareness raising or training on recognizing what a “gender stereotype” is, and what its negative effects may be.
- **Media Training for Gender institutions:** At the same time, national machineries for gender equality, gender focal points within government and other “gender institutions” should receive training in how to effectively use the media to challenge gender stereotypes. Similar training could be provided to key NGOs.

## II. Media Control, Participation And Access

“It is easy to anticipate that in the next century, the right to communicate will be as important as the right to education has been in this century.”  
 - Sally Burch, *AWID Forum Panel on Gender Communication for the Third Millennium*, 1996.

**Participation of both men and women within media professions** is an important issue of access and control within media. While women are often well-represented within journalist circles, men often dominate high-level editorial positions, particularly of mainstream news media outlets. While it is by no means certain that women will be more committed to highlighting gender issues than men, giving both genders equal access to editorial power will at the very least promote a wider spectrum of editorial standpoints, thus enhancing the plurality of media content. At the same time, barriers that keep women out of top positions need to be addressed as a matter of labour market discrimination (see Gender Brief on LABOUR for more details).

**Media licensing** (i.e. the issuing of licenses and broadcasting channels to media outlets) can also be examined from a gender perspective. Procurement of such licenses is sometimes dependent upon the applicant’s finances, and because women in general are at an economic disadvantage to men in most societies, they may experience barriers in procurement of licenses.

**Censorship of the media** can also be examined from a gender perspective. The undue exertion of influence and control over the media by political forces is a serious barrier to free expression and to the reflection of diverse opinions. In effect, this censorship represents a “shut-down” of civil society, in its widest interpretation.

Strong links can be noted between the existence of political censorship and the existence of extensive barriers to gender equality. While these links require deeper analysis in their specific contexts, the connection between an impulse to assert control over free expression in the media and to assert control over gender roles and behaviour is unlikely to be coincidental.

It follows that efforts to withdraw censorship and efforts to strengthen gender equality can complement one another.

The **goals** in terms of media access, control and participation are therefore:

- to ensure that men and women have **equal access to decision-making positions** in media;
- to **lift censorship** of a free and independent media, as this is likely to be related to the barriers to full promotion of gender equality.

## Why Bother?

**Justice:** Because equal opportunities in employment is a human rights imperative, ensuring that men and women can enjoy equal access to producing media is a question of human rights and justice.

**Credibility:** A true democracy is closely linked to independent and pluralistic media, and a truly pluralistic media represents a variety of standpoints – including both women's and men's. A media environment that does not give access to all standpoints in society is not credible.

**Quality of Life:** If significant gender imbalance exists between the number of men and women who work as journalists, and those who are in high-level editorial positions, this obviously propagates unequal economic opportunities, as salaries (and prestige) at the two levels greatly differ.

## Measuring Progress:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio in top editorial positions of major print, radio and television media	National Regional Local	Gender balance of participation in media content decision-making positions	Level of commitment to reflection of gender issues by either men or women	Survey of media outlets
Male:female ratio of journalists in major print, radio and television media.	National Regional Local Useful to compare with gender balance in editorial positions.	Gender balance in journalistic profession.	Level of commitment to reflection of gender issues by either men or women	Survey of media outlets

## Possible Interventions and Entry Points

- **Lifting of censorship:** Review government media legislation and policy and remove any barriers to an independent and pluralistic media, if applicable.
- **Review of media licensing procedures:** A review and analysis of the way in which media licenses are granted, and to whom, will reveal any gender discrepancies in this area. Should major gender imbalance be revealed, steps should be taken to address these, such as the drafting and adoption of gender-sensitive licensing policy.
- **Introduction of Equal Opportunities policy within media outlets:** Policy makers can encourage media outlets to adopt concrete policies on non-discrimination and equal opportunities in their recruitment

and promotion policies. A sample policy can be drafted, which can then be distributed to media outlets for them to adapt and adopt.

## ENVIRONMENT AND SUSTAINABLE DEVELOPMENT

*This Brief looks at the relationship between sustainable development, the environment and gender. In general, gender mainstreaming needs to approach this issue from two reciprocal standpoints: On the one hand, gender relations and the extent of gender equality can affect the environment. Conversely, the state of the environment can have disparate effects on men and women.*

### *Linking Gender and the Environment*

*Like gender, environment is a “cross-cutting” issue. This means that environmental impact, like gender impact, should be assessed in the development of all public policy. Aspects of policy making that are important from a gender perspective are also important from an environmental perspective, for example:*

- *participatory decision-making and stakeholder involvement*
- *a revaluation of the criteria by which “good” policy is judged*

## I. Sustainable Global Environment and Approaches To Development

### What is the Issue? What is the Goal?

Some experts have argued that links between sustainable development and gender pertain primarily in traditional agrarian contexts and at the local level, while major (global) environmental threats have little connection with gender relations and equality.<sup>104</sup> However, this argument may partially stem from a lack of research and data on the links between gender equality and sustainable development at the global level.

For example, two of the main global environmental threats that face us today are the depletion of the ozone layer and climate change. Both of these threats stem largely from consumption and production patterns related to industrialization and the dominant processes of economic globalization.<sup>105</sup> Change requires re-examining the ways in which trade, industry, development and other economic policies are pursued. In this sense, global environmental threats are a question of macroeconomic policies and governance.

Other Gender Briefs in this series (see MACROECONOMICS AND TRADE and GOVERNANCE AND PARTICIPATION) have demonstrated that enhancing attention to gender equality in these areas will bring greater accountability and focus on social justice. While more research is required to determine the precise nature of this link, it can be argued that greater gender equality in decision-making positions and the adoption of social justice criteria for macroeconomic policy will also enhance attention to sustainable development, including a sustainable global environment.

Furthermore, other major environmental threats, such as loss of biodiversity, can nonetheless be addressed at the local level. Because men and women often engage in different types of farming and land use, men and women hold different knowledge that can contribute to biodiversity. Research has also shown that different roles for men and women (e.g. cash crop farming vs. food preparation) means that they may have different preferences on plant and crop qualities, for instance.<sup>106</sup>

The **goal** regarding sustainable environment and development policy is therefore:

- closer **investigation** of the **links** between policy that promotes sustainable environmental development and policy that promotes gender equality; and

<sup>104</sup> See Martine and Villarreal, 1997

<sup>105</sup> Martine and Villarreal.

<sup>106</sup> B. Woroniuk and J. Schalkwyk.

- using these links as the basis for **promoting** a more **sustainable development agenda**, in both human and environmental terms.

**Progress** towards the above goals can also be aided by:

- **promoting equal participation** of men and women in the highest environmental, macroeconomic and development policy-making positions.

## Why Bother?

**Justice:** Equal participation of men and women in environmental decision-making is a question of equal rights and responsibilities: given the major impact that global environmental degradation will have on all people's lives and future generations, both women and men must share the right and responsibility of defining environmental priorities and developing environmentally sustainable development solutions.

**Credibility and Accountability:** While it would be questionable to assert that women are naturally more inclined than men to make decisions in favour of protecting the environment<sup>107</sup>, a stronger presence of women in political decision-making is likely to bring more accountability and a broader perspective into decision-making processes. This can at least open up space within these processes for a more transparent and critical debate on sustainable environments to emerge.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of top political positions for environmental decision-making (e.g. in Ministry of Environment, Environmental councils or similar)	National	Gender balance in decision-making positions	Commitment to or understanding of gender equality and environmental issues by either men or women in these positions	Survey
Male:female ratio of activists in environmental NGOs	National	A high proportion of men may mean that a gender dimension is excluded from the environmental lobby agenda.		Survey

## Possible Interventions and Entry Points

- **Researching the links:** As noted above, there is a lack of research that investigates the links between gender equality (particularly in governance and decision-making) and environmentally sustainable macroeconomic and development policies. Such research needs to be undertaken at both the global (comparative) and national levels.
- **Institutional analysis ("Who are the decision makers? What is their perspective?"):** A survey of decision-makers and their opinions can help trace links between a gender and sustainable development. A sociological survey (interviews) should be commissioned that specifically looks for and analyzes links between a pro-gender equality and pro-sustainability agenda.

<sup>107</sup> Some people suggest that women are naturally "closer to nature" (because of child-bearing and other "reproductive work" functions) and are therefore more likely to protect natural environments. However, as Martine and Villarreal (1997) point out, this is more likely an issue of "perception, rather than fact." Simply because societies associate women with "nature" does not mean they will behave in a sustainable way. "Biological determinist" approach also enforces the false "natural" division where men are responsible for production, while women are responsible for reproduction.

- **Establishment of “Gender and Environment” working group:** An interministerial working group or commission could be established to “proof” all policy documents from a gender and environmental impact perspective. Policies in the areas of trade, economic development, income generation and health in particular may be targeted, as all of these policy areas have distinct gender and environment dimensions. This does not mean that the task of mainstreaming would fall to this group alone – all people at all levels should be responsible for mainstreaming. The role of this group would be to ensure that this has been done, and to assess the adequacy of these efforts.

## II. Gendered Roles In Environmental Protection

### What is the Issue? What is the Goal?

Because men and women are likely to have different roles in the family, community and work force, they are likely to have different personal priorities when it comes to environmental protection at the local and community level. Men and women are also likely to have different interactions with the environment, which present each gender with different opportunities to protect it. Moreover, it is likely that men and women adopt different strategies and are the sources of different types of knowledge regarding environmental protection.

Some examples of these differences include<sup>108</sup>:

- For women with double and triple roles as breadwinner, homemaker and community manager, time pressures may force them to adopt unsound environmental practices at the household level, e.g. in **disposing of waste and recycling**. Access to other “time saving” appliances may be viewed as a top priority for women, even though these may not make efficient use of natural resources.
- Traditional attitudes around masculinity may make men reluctant to adopt environmentally sound practices, for example, in terms of **motor vehicle use** (a car may be a status symbol in a man’s professional life).
- Because women often rely more on **public transportation** than men, they possess vital knowledge in terms of convenience of schedules and routes, which should be called upon when planning for public transportation.
- Women’s domestic responsibilities (e.g. procuring **fuel and water**) may mean that they adopt unsound environmental practices when these resources are scarce.
- Because women often play the role of “carer” or “healer” in the community, they may possess knowledge of environmentally sustainable practices, such as benefits derived from **medicinal plants** and other non-timber **forestry products**.

*It is important to note that while neither men nor women have a “natural predisposition” for environmental protection, patterns regarding their roles in society may mean that strategies for promoting environmental protection at the local and community level need to target men and women differently.*

The goal of gender mainstreaming in terms of environmental protection is therefore:

- when developing environmental policy, to call on and consider the **different positions and knowledge** of men and women in regard to the environment;
- to **disseminate information** about **environmental protection** to audiences in a way that recognizes **men’s and women’s different roles and priorities** in relation to the environment.

### Why Bother?

**Efficiency and Sustainability:** Better targeted policies (i.e. those that specifically take into consideration the needs, priorities and perspectives of different groups of men and women) are more effective policies – which means more efficient use of resources needed to implement these policies.

<sup>108</sup> these examples have been in part adapted from Annex I of the OECD/DAC document “Reaching the Goals in the 21<sup>st</sup> Century: Gender Equality and the Environment.”, prepared by Sida.

Additionally, if policies are not targeted appropriately, they will not be effective, and the environment will not be adequately protected. This will ultimately harm environmental sustainability.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of top-level environmental decision makers	National	Gender balance in decision-making positions	Awareness of or commitment to gender equality issues by either men or women	Survey
Male:female levels of awareness of environmental problems, measured pre- and post- interventions (i.e. information campaigns, etc)*	National, regional, local (depends on intervention).	Differences in level of change between men and women indicate how well campaign targeted men and women		Sociological survey

\* specific methodology will need to developed to ensure that such measurements can be repeated and compared over time.

## Possible Interventions and Entry Points

First, it is crucial to gather and analyze information that can help identify how and where to target environmental protection messages. Potential activities include:

- **Household surveys:** Sociological surveys at the household level can help policy makers identify different roles men and women play in the management of household resources that affect the environment. For example, the survey should include questions on waste disposal (who is responsible for waste disposal? What sorts of materials are reused and recycled?), family vehicle use, water use and conservation, energy and fuel use, etc..
- **Community and Workplace surveys:** Similarly, surveys on environmental practices and priorities in the community and workplace can help identify different practices, viewpoints and needs of men and women.
- **Natural Resources Management Policy Review:** A comprehensive gender analysis should be undertaken which reviews policy and practice in areas of energy, solid waste disposal, water or other environment-related issues. The goal of such a review would be to identify ways in which such policy might impact men and women, given their different roles in the community. For example, if recycling points are located in remote areas only accessible by car, women, who may be responsible for waste disposal in the home, but who have little available time and no access to a vehicle, may have little motivation to recycle.

Once the different knowledge and situation of men and women is identified, potential strategies that might promote environmental protection include:

- **Targeted information campaigns:** Any good information campaign has a well-identified and targeted audience. Campaigns and other environmental awareness-raising measures should be sure to target men and women according to their priorities and needs.
- **Provision of gender-sensitive alternatives:** If roles or responsibilities of men or women force them to adopt environmentally unsound practices, policies that promote alternatives should be sought.

### III. The Gendered Impact Of Environmental Degradation And Environmental Clean-Up

#### What is the Issue? What is the Goal?

*Women and men are often differently affected by local and regional environmental degradation because the tasks and work patterns of women and men (in both the workforce and the household) are likely to differ. For instance, men often suffer more from exposure to environmental hazards related to their employment (e.g. driving to work, working mining or other potentially hazardous industries – even participation in armed conflict), while women often suffer more from environmental hazards in the home environment (e.g. exposure to gas or wood-fire stove smoke).*

Degradation can also lead to the implementation of environmental protection policies that can drastically affect livelihoods, and the effects are often different for men and women. For example, certain sectors of the work force have undergone radical change in order to protect fragile, abused or depleted natural environments. These sectors include:

- forestry
- mining
- fisheries
- agriculture

*Many of these sectors are heavily dominated by male labourers, and apart from the obvious economic crisis such change can bring, the psychological crisis wrought by loss of livelihood is not insignificant. This crisis can also influence the way that men view environmental protection overall, and may make them less responsive to environmental protection or clean-up policies in other spheres of their lives.*

The **goals** of gender mainstreaming here are thus:

- to ensure that men and women are afforded **equal protection** from environmental hazards;
- in the context of environmental clean-up, to consider the **diverse needs of** and **effects on** men and women.

#### Why Bother?

**Justice and Credibility:** Women and men have the right to equal protection from environmental pollution and degradation. Policy-makers need to ensure this equal protection not least as a human rights imperative. Furthermore, if governments only “partially protect” their population or remain indifferent to the needs of either men or women, their credibility is damaged.

**Quality of Life and Efficiency:** The health and economic consequences of pollution and environmental hazards on human beings has been well documented. These consequences also have strong links with chronic poverty. Apart from the major barrier this poses to quality of life of men, women and their families, this also has broader implications for the nation’s economic growth.

Furthermore, a strong case can be made for the fact that it is often cheaper to prevent pollution and environmental degradation than it is to clean it up afterwards. A gender mainstreaming approach can help to more precisely and accurately identify environmental hazards that affect men and women.

**Chain reaction:** Adopting a participatory approach to assessing environmental degradation (which includes making an effort to understand the needs and concerns of both men and women in terms of environmental clean-up programmes) will build trust and credibility, which in turn may elicit more commitment to environmental protection from the population in general.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio of DALYs* lost from environmental pollution and degradation	National	Can identify differential impact of degradation on men and women. Decrease in DALYs for one gender but not the other can indicate the lack of a gender perspective in policy.		Survey
Male:female mortality rate from exposure to environmental hazards	National	Can identify differential impact of degradation on men and women. Decrease in mortality for one gender but not the other can indicate the lack of a gender perspective in policy.		Medical statistics
Male:female ratio of jobs lost due to environmental degradation	National	Differential impact of environmental degradation on men's and women's livelihoods		Survey

\*DALYs – measurement of life years lost due to illness and disability

## Possible Interventions and Entry Points

- Research: Studies that assess environmental degradation often fail to note disparities of the effects of environmental degradation on men and women. Commissioning such research and analysis will help to clarify the extent and nature of these disparities.
- **Gender Impact Assessments of Environmental Policies and Emergency Environmental Actions:** Before environmental protection and clean-up policies and programmes are implemented, a gender impact assessment should be undertaken to identify how such actions will differently affect men and women.

This is by no means asking environmental damage to be ignored because solutions may have a gender impact – quite the opposite. The objective is rather to research and analyze the impact of environmental protection actions, so that appropriate policies can be put in place that would minimize the negative effects to both men's and women's short-term livelihoods and welfare, while protecting the long-term sustainability of the environment.

## DEFENSE, CONFLICT AND PEACE-BUILDING

This Gender Brief examines gender mainstreaming in the context of defense, conflict and peace-building. In many ways, adopting a gender approach here is about recognizing the value and positive benefits of adding a female perspective in what is often a male-dominated sector. At the same time, this sector is a particularly good example of the urgency for addressing male identity and men's gender needs in policy interventions.

*"Peace is a prerequisite to achieve the goal of gender equality and women's empowerment and some would argue that gender equality is necessary for true peace (broadly defined)."*<sup>109</sup>

<sup>109</sup> CIDA, 1999

## I. Military and Defense Institutions

**What is the Issue? What is the Goal?**

Military and defense institutions, forces and structures are most often male-dominated. This has much to do with stereotypes about the roles of men and women in society: it is commonly held that it is “man’s place” to defend the country – and to protect its women and children. For example, many countries have compulsory service for men, but not for women.

*Various arguments are often put forward as to why women should not serve in the armed forces, most of which are based on the claim that women are physically inferior to men and ineffective in a battle situation. However, evidence shows that equal training and treatment of women can lead to equally effective female military personnel.*

Furthermore, the changing nature of “warfare” means that the roles which need to be filled within military institutions are changing, too – sheer brawn is not sufficient. At the same time, to assume that every man will automatically make a “good soldier” is also flawed. This assumption depends on male stereotypes that may not hold up in reality. Thus gender should not be a deciding factor in determining roles for men and women in military institutions.

Approached from another point of view, the situation of men serving in military institutions also needs to be examined from a gender mainstreaming perspective. In many transition countries these men have extremely low levels of education and may have very poor health (physical and mental). Thus ensuring equal social opportunities and protection of men within the military should also be a focus of policy-makers.

In summary, the **goals** of gender mainstreaming in terms of military and defense institutions should be:

- **elimination of discrimination** on the sole basis of gender within defense and military institutions;
- **integration of a gender perspective** into research, policy and practice of defense and military institutions.

**Why Bother?**

**Justice and Credibility:** A state that includes a commitment to non-discrimination in its constitution (or by being party to CEDAW or other human rights conventions) damages its credibility if it does not demonstrate this principle in practice. Discrimination within military institutions is not exempt from this commitment. Equal opportunities for men and women, including to pursue a military career, is a human rights imperative.

*“The legitimacy of existing governance structures and processes must be questioned when the interests and voices of over half the population are not reflected in the decisions made. This crisis of legitimacy is evident in the gendered nature of conflict; women rarely decide on or engage in wars but always suffer their consequences.”<sup>110</sup>*

**Efficiency:** Gender diversity within military institutions may increase their efficiency. For example, it has been noted that some women are much more skilled than men at working with sophisticated military electronics. The point is not necessarily that “women are better at electronics”, but that with both men and women in these institutions, the labour and skills pool is wider and more diverse - which ultimately enhances efficiency.

Furthermore, recognition of the changing role of defense and military institutions, as well as the changing role of men and women within society allows for the adoption of policy and practice within these institutions that is based on efficiency and ability, rather than on the subjective basis of gender.

<sup>110</sup> G. Ashworth, pg. 5

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male:female ratio in leadership positions in military and defense institutions	National	Gender balance in military and defense governance	To what extent a gender perspective is integrated in policy and practice	Survey
Reported incidence of sexual harassment and assault within military and defense institutions	National	Can indicate effectiveness of anti-discrimination policies within these institutions (higher reporting = more effective policies and more trust in the system)	This is unlikely to measure actual incidence of harassment and assault.	Records
Actual incidence of sexual harassment and assault within military and defense institutions	National	Actual incidence of sexual harassment and assault.		In-depth sociological surveys

## Possible Interventions and Entry Points

- **Promotion of Equal Opportunities within Military and Defense Institutions:** Governments and policy makers can institute affirmative action policies and non-discrimination policies aimed at increasing the number of women employed in these institutions. At the same time, such efforts must be accompanied by policies on sexual harassment, which must be actively enforced. Awareness-raising and training of top staff and officials will be necessary to make such policies effective.
- **Increasing awareness on the way in which women are affected by conflict and war:** (see Part II of this Brief for more information on the roles of men and women in conflict situations). Increasing awareness and generating debate on men's and women's diverse roles can lead to a better understanding of these roles, and how both men and women can make meaningful contributions to military and defense institutions. Furthermore, this should lead to greater tolerance and hopefully a reduction in the incidence of harassment within these institutions. One means of doing this is by increasing the use of women as key trainers and teachers in military academies.
- **Integrating a gender perspective into research:** Military and defense institutions also carry out a variety of research on defense and military issues (through the National Defense/Military Academy, for instance). Research on defense issues should be sure to integrate a gender perspective, examining the ways in which war and conflict can affect men and women differently and the roles that women and men can play in military and defense institutions.

## II. Gender Roles In Violent Conflict And War

### What is the Issue? What is the Goal?

Enhancing a gender perspective in governance structures overall can in some cases help avert conflict. However, certain conflict may be inevitable – in these cases, the integration of a gender perspective can have great impact in ensuring that conflicts are navigated and resolved in ways that do minimal damage to men and women, and thus society more broadly. However, in order to adopt a gender perspective, a better understanding of the roles that men and women play during times of violent conflict is necessary.

Stereotypes about men's and women's roles influence what sort of attention we afford them in conflict situations. This means that many of the diverse roles that women and men actually assume in these situations may be overlooked.

For example, although war is often considered to be the domain of men, **women** have always been involved by violent conflicts in any of a number of ways:

- women as soldiers
- women as mothers and wives of soldiers
- women as part of civilian communities targeted during conflict
- women as victims of rape and other war crimes
- women as breadwinners and heads of households
- women as carers for children, the elderly and the wounded
- women as social and political organizers
- women as aggressors

Similarly, **men's roles** are very diverse:

- men as soldiers
- men as victims of abuse and violence
- men as husbands, fathers and breadwinners separated from their families
- men as conscientious objectors to war
- men as social and political organizers
- men as (psychologically and/or physically) wounded
- young men as child soldiers

It is therefore crucial to consider how men and **concepts of masculinity** are affected by conflict and war. Many men do not choose to participate in battle, but are forced into doing so either by law or other means of force. Weakness, emotion and sensitivity are often frowned upon and punished in such contexts, thus enforcing male stereotypes and often causing grave psychological damage to men.

Furthermore, while conflict and war serve both to further entrench gender roles and stereotypes, they also (paradoxically) allow **non-traditional gender roles** to emerge from social upheaval. While war is by definition a crisis situation, the affect of conflict on gender roles within society should be expressly addressed in post-conflict interventions (see Part III of this Brief).

*Gender-based violence: Special mention needs to be made of gender-based violence in violent conflict. Because women are often perceived as “keepers of the culture”, they are extremely vulnerable to sexual violence during violent conflict– rape and forced pregnancy are thus employed as weapons of war and genocide. It is absolutely crucial that:*

- military institutions recognize that the formal or informal sanction of rape and sexual assault is a war crime; those who order, condone or engage in such practices must be punished for their crime;
- women must be offered adequate protection during conflict from such crimes. They require services and rehabilitation should they be subjected to such crimes.

At the same time, men, too, can be victims of sexual assault and rape during war and conflict. They should be afforded protection and rehabilitation services, and perpetrators should be punished for these crimes.

The **goal** in terms of men's and women's roles in conflict is thus:

- to **recognize** the extremely diverse roles that men and women play in violent conflict, and **incorporate** this recognition into any policy or public interventions.

## Why Bother?

**Justice:** Systematic rape is now formally recognized by international human rights bodies as a war crime. Recognizing both women and men as victims of rape and other forms of sexual assault in the name of “warfare” is an issue of justice.

**Quality of Life:** It is no secret that quality of life in general is severely compromised during violent conflict and war for both men and women. However, failing to recognize the diverse roles that men and

women play in these conflicts can lead to serious neglect of their needs – thus worsening their quality of life further still.

**Chain Reaction:** Recognizing the diverse roles that both men and women play during violent conflict and war leads to better recognition of their needs, strengths and potential contributions to building and sustaining peace in both pre- and post-conflict situations. This can have incredible impact – including aversion of conflict altogether.

## Measuring Progress

The very nature of conflict and war means that little attention can be paid to actually measuring aspects of this conflict, while in progress. However, certain interventions, such as relief and aid, can be monitored:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of female-specific services such as reproductive health services, in camps and shelters	n/a	Attention to needs of women during conflict		Survey of aid and assistance provision

## Possible Interventions and Entry Points

Unfortunately, the very nature of conflict and war often means that regular policies and programmes cease to function normally. However, recognition of men's and women's diverse roles during violent conflict is important at various entry points:

- **Emergency aid to refugees and IDPs:** As the result of conflict, large numbers of people are often left without access to basic supplies, such as food and water. Additionally, many people are forced to leave their homes, either seeking refuge in other countries (asylum seekers and refugees) or somewhere in their own (internally displaced people - IDPs). Asylum seekers and IDPs have great need for immediate relief and aid as well (concerns of IDPs and refugees go beyond the needs of immediate relief and aid, but are too numerous and complex to be dealt with in the scope of this brief.)

*In the distribution of aid and the provision of relief services, a gender perspective is absolutely crucial. One question in this regard is targeting of recipients – should these be families or individuals? When aid is distributed, certain assumptions may be made about the nature of family relationships and distribution systems within social networks. Ensuring distribution to women and children may thus demand that aid distribution focus on needs of individual men, women and children within households. For example, reproductive and sexual health services need to be integrated into emergency relief and aid efforts. Gender sensitivity training for relief and aid workers, as well as networking with women's organizations are two entry points for ensuring a gender-based approach to the provision of emergency relief and aid.*

### III. Conflict Resolution, Peacebuilding and Post-Conflict Situations

#### What is the Issue? What is the Goal?

*“Women (as well as men) have a fundamental stake in building peaceful communities. Their contributions to peacebuilding should be encouraged and supported (given women’s economic and political marginalization, they are not always well-placed to play an effective role).”<sup>111</sup>*

During the period of conflict resolution and peace negotiations, and following the cessation of active conflict, governments and societies must undertake the task of negotiating the terms of peace and rebuilding their society. There are a number of gender dimensions that must be considered here:

**Negotiating Peace:** Experience has shown that women have in many instances exhibited great courage in intervening in conflicts as peacemakers, and have often been very effective at doing so. Different reasons have been suggested for women’s adeptness as peacemaking: some suggest that females have a predisposition to peace in their nature, while others note that it may be women’s very lack of exposure to traditional politics (where “egos” run high) that makes them more amenable to consensus building. Whatever the reasons, women’s contributions to peacebuilding and conflict resolution must be acknowledged and encouraged.

*“Even where revolutions have been fought in the name of social justice, women have rarely benefited from post-conflict reconstruction.”<sup>112</sup>*

**Return to the Old, or Heralding the New?:** Because of the social upheaval caused by conflict, it is often - paradoxically - a catalyst for the emergence and exercise of non-traditional gender roles. For example, the two World Wars in the first half of the twentieth century saw women enter the formal labour force in unprecedented numbers. In other parts of the world, women have been powerful voices and agents in freedom fighting movements. However, in most cases attempts are made to reverse newly established instances of enhanced equality and return to the “normal order of things” once the battle has been fought and won.

It is therefore critical that in negotiating peace and “starting over,” explicit attention is paid to gender equality, so that both women and men can equally benefit from peace.

**Reintegration of ex-combatants:** If women have been involved in battle, it is likely that they may have experienced a greater degree of equality with men, and returning to communities where traditional gender roles dominate may be difficult.<sup>113</sup> At the same time, this “upset” of the status quo can be focused on in when addressing gender stereotypes and roles, and pointed to as an example of the flexibility of gender roles.

A related issue here is the question of recipient communities, who must integrate returning combatants. Again, conflict may arise if during the war, women had assumed “non-traditional” roles of breadwinner or household-head, yet are expected to relinquish these roles once men return from the battlefield. At the same time, men will also experience crisis due to this upheaval of social order, and their needs must be addressed adequately as well.

The goals here are thus:

- promoting and ensuring a “**gendered peace**” in peace-building processes, and
- **recognizing the gender needs** of the communities which will host ex-combatants, and of the ex-combatants themselves;

<sup>111</sup> CIDA, 1999.

<sup>112</sup> G. Ashworth, pg. 5

<sup>113</sup> GIDP, 2000

## Why Bother?

**Credibility:** A peace that does not recognize the needs and rights of both men and women is not a “gendered peace” – it is neither truly democratic, nor credible. Those responsible for negotiating peace and running a transitional government must be accountable to all members of society, recognizing the great sacrifices that both men and women have made in the name of peace.

**Quality of Life:** Attention to the needs of both men and women in post-conflict rehabilitation will ensure that all members of society can rebuild their lives in the most effective and efficient manner.

**Chain Reaction:** The terms that are agreed upon in peace negotiations will largely set the perimeters of the nation-(re)building that is to follow. It is thus crucial that gender needs and the rights of both men and women are taken into consideration.

## Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Ratio of men:women “around the table” at formal peace talks and negotiations	National	Gender balance in governance structures building peace	How well gender needs will be addressed in establishing the “new order”	Survey
Male:female ratio in bodies charged with implementing peace	National	Gender balance in governance structures building peace	How well gender needs will be addressed in establishing the “new order”	Survey
% of donor funding going to women-led civil society peace initiatives	National	Attention to the positive influence women can bring to the peace-building processes		Audit of donor support
Male:female ratio of both implementers and beneficiaries of peace education projects	National	Whether women and men are being equally targeted for facilitating and benefitting from peace education programmes	Attention to gender dimension within these programmes	Monitoring and evaluation records of these programmes

## Possible Interventions and Entry Points

- **Recognition of rape as a war crime:** Part of ensuring a “gendered peace” means that those responsible for the perpetration of gender-based war crimes are brought to justice. The use of such methods as weapons of war must be recognized as unlawful and perpetrators must be brought to trial and punished.
- **Promotion of women as peace-builders:** Those responsible for negotiating peace should be sure to draw on women’s specific knowledge and experience and include them in such negotiations. Furthermore, the situation of women should be addressed in all peace negotiations and gender equality must form the basis of any “new order” that is established. This means written commitments to gender equality should be included in any agreements or new constitutions that are drafted.
- **Integration of a gender perspective into peace-building education and tolerance programmes:** Any donor-funded or national programmes to build peace and tolerance should explicitly include components on the gendered dimensions of peace. Gender experts and activists should be called on to contribute to the formulation and implementation of such initiatives. Moreover, working with youth is particularly important. Any work with youth should explicitly encourage gender equality.

## GLOSSARY of Key Terms and Concepts for Gender Mainstreaming

In many situations, a full understanding of gender mainstreaming is impeded by the fact that the concepts and terms used in connection with this approach are unfamiliar to policy makers and the general public.

Moreover, many of these terms do not translate easily into local languages! Many practitioners have therefore found it helpful to adapt these terms using translations more appropriate to their own language. Discussions and training sessions aimed specifically at familiarizing others (policy makers, journalists, academics, etc) with these terms have proven to be very helpful exercises. Remember: it is not the term itself that is most important, but the idea behind it. Debates around issues of language can be an excellent way of creating in-depth understanding of the ideas behind the words.

Some key terms include but are not limited to:

**Gender and Sex.** Usually, sex is understood to refer to the biological difference between male and female bodies. Gender, on the other hand, refers to the sociologically- and culturally-based distinction between men and women. One's gender is therefore most often comprised of those roles and attributes that are not purely „natural“ or biologically determined, but are rather dictated by norms and traditions. Because gender is not biologically given, the attributes of both male and female gender can (and do) change over time and across cultures.

**Gender Balance** – Gender balance refers to the ration of women to men in any given situation. Gender balance is achieved when there are approximately equal numbers of men and women present or participating. This is sometimes also referred to as **gender parity**.

**Gender Disparities:** These are differences between men and women in respect to their status, situation, rights, responsibilities, or other attributes. Also known as inequality of outcome, disparities are not always the result of gender discrimination (e.g. women's ability to bear children), but in most cases, seemingly “natural” disparities are often the result of direct or indirect discrimination.

**Gender Equality:** Equality exists when both men and women are attributed equal social value, equal rights and equal responsibilities, and have equal access to the means (resources, opportunities) to exercise these.

**Gender Expertise/Expert** – Gender mainstreaming requires „gender expertise“ or the participation of a „gender expert.“ This means that the expert will be trained in gender analysis and/or have significant experience in analyzing the situation of men and women and the way in which they are differently affected by policies and actions.

**Gender Issues** – „Gender issues“ become evident when any policy or situation is examined through a „gender lens“ or using a „gender perspective.

**Gender Perspective or Gender Lens** – Using a „gender perspective“ means approaching or examining an issue, paying particular attention to the potentially different ways that men and women are or might be impacted. This is also called using or looking through a „gender lens.“ In a sense, it is exactly that: a filter or a lens that specifically highlights real or potential differences between men and women.

**„Gender Questions“** – „Gender questions“ are the starting point of any gender analysis. They seek to uncover the assumptions inherent in any statement or situation, and look below the surface to reveal hidden (potential or existing) differences between men and women. „Gender questions“ can only be asked once gender stereotypes and assumptions about gender roles have been acknowledged and overturned.

**Gender Relations:** The social relationships and power distribution between men and women in both the private (personal) and public spheres.

**Gender Roles** – These are the roles assigned to men and women respectively according to cultural norms and traditions. Most often, gender roles are not based on biological or physical imperatives, but rather result from stereotypes and presumptions about what men and women can and should do. Gender roles become problematic when a society assigns greater value to the roles of one gender – usually men's.

**Gender Stereotypes** – Gender stereotypes arise from (often outdated) presumptions about the roles, abilities and attributes of men and women. While in some specific situations, such stereotypes can be found to have a basis in reality, stereotypes become problematic when they are then assumed to apply to all men or all women. This can lead to both material and psychological barriers that prevent women and men from making choices and fully enjoying their rights.

**Gender Analysis:** Also referred to as **gender-sensitive, gender-based or gender-aware analysis**, this is analysis that (a) makes visible any disparities between genders into account and (b) analyzes these disparities according to established sociological (or other) theories about gender relations.

**Gender Impact Analysis:** This is a specific type of gender analysis that is used to evaluate existing or proposed public policy or legislation. It analyses the existing and/or potential effects on both men and women (and various groups of men and women) that the policy has or will have.

**Gendered Effects** – These refer to the effects of any policy, action or situation that can be seen to have a different impact on men and women. The „gendered effects“ of any policy, action or situation are what gender analysis and a gender perspective seek to uncover and make visible.

**De Facto and De Jure Gender Equality** – *De jure* equality (sometimes called formal equality or “paper governance”) refers to equality under the law. *De facto* equality refers to equality in practice.

**Direct and Indirect Discrimination:** Direct discrimination is a deliberate act (and its result) that favours one sex over the other. Indirect discrimination results from social, economic, political, cultural or other practices that create a situation of inequality. Both need to be addressed.

**Disaggregation by Sex (or Gender):** This refers to data or statistics that are divided to show the respective results for women and men separately. Given that this division applies to the biologically differentiated bodies of men and women, it is probably more correct to say „sex-disaggregated“. However, using the term „disaggregated by gender“ or „gender-disaggregated“ should be taken to mean the same thing.

**Reproductive Labour:** This refers most often to work in the domestic sphere or other caring work (often done by women) that is performed without pay or the expectation of pay, and is not calculated as part of the gross domestic product. It involves the maintenance of social and family structures upon which productive labour depends. It is also referred to as social reproduction.

**Social Justice** – Social justice is a goal of sustainable human development. It refers to the situation of fairness and equality of treatment of all peoples. It is specifically „social,“ since it refers not only to equality before the law, but of just treatment in practice. According to social justice, people and their well-being take priority over other (economic) concerns. Gender equality is a critical and indivisible component of social justice. Social justice cannot exist if men or women are being discriminated against.

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**GENDER ANALYSIS:  
A BRIEF GUIDE**

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Updated 2005



## INTRODUCTION

Any type of planning – be it project, programme or policy planning – requires not only information, but also analysis of this information, as its starting point.\*

To plan gender interventions, you need gender analysis. Without gender analysis, you can not be certain that your interventions are really contributing to the promotion of gender equality and socially just human development.

Because there is no set “recipe” for attaining gender equality, it is crucial to have a full understanding of the gender issues in any given situation – and these situations differ. Therefore, any intervention should be preceded by asking questions such as the following:

- *Will your planned policy intervention challenge current barriers to gender equality? Or will it reinforce these barriers?*
- *Is a programme targeted at woman going to empower them? Or simply marginalize them more?*
- *Will mandating the involvement of men in a “women’s issue” silence female voices? Or facilitate important dialogue between both genders?*

Without gender analysis, it is impossible to answer these and similar questions. Gender analysis is therefore the necessary starting point of gender mainstreaming.

This **brief guide** has two purposes:

- To introduce you to basic concepts and approaches for doing gender analysis;**
- To help you plan for, commission, and evaluate gender analysis research.**

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\* These guidelines are also applicable to corporate and operations policies – such as human resource policies, training programmes and staff evaluation policies, for example.

## A. BASIC CONCEPTS AND APPROACHES FOR DOING GENDER ANALYSIS

### What is Gender Analysis?

Gender analysis is defined in different ways in different contexts. At its most basic level, it means analysis of a situation or policy that pays specific attention to existing and potential differences between men and women. The goal of gender analysis is to make these often-overlooked differences visible.

Remember, „analysis“ can occur on many different levels. It can be a brainstorm that you do at your desk when planning a project, or it can be an in-depth research project that you contract out to professionals.

**Gender analysis** is sometimes also referred to as:

**Gender-sensitive analysis:** This term reminds us that gender-related differences are not always obvious. We need particular *sensitivity* in order to make these real and potential differences visible to policy makers.

**Gender-based analysis:** This term stresses that we are specifically looking for differences that are *based on gender*.

**Gender-aware analysis:** This term reminds us that although gender differences often exist, traditional research and analysis does not always make us *aware* of these differences. We require a specific gender perspective in order to create this awareness.

Each of these terms emphasizes a different aspect of gender analysis, but they are often used interchangeably. Remember, the name is not the most important thing – our focus should be on the general principle that all of these concepts refer to.

A specific type of gender analysis is called **gender impact analysis**. This has all the components of any gender analysis, but focuses on how existing or intended projects or policies will or do impact men and women differently. It is therefore one specific type of **public policy research**.

### When Do You Need to Apply Gender Analysis?

Gender analysis is necessary at many stages, and should help you to answer the following (and similar) questions:

#### *Writing or Evaluating a project/policy document*

- Will the proposed project/policy contribute to existing inequalities between men and women?
- Does the proposed project/policy break down or challenge existing inequalities between men and women?
- What options should be considered to strengthen a gender perspective?

#### *Monitoring a project/policy*

- Are both men and women equally involved in the process of implementation?
- Is progress towards gender equality objectives clearly stated in the project design?
- Have any gender issues arisen, that were not identified at the project/policy design stage? How can they be addressed?

#### *Evaluating a project/policy*

- To what extent have the gender equality objectives met?
- Have there been any unexpected or unintentional gendered effects of the project/policy?

## Baseline Theories about Gender

Gender analysis differs from traditional research or analysis because it is *specifically informed by baseline theories about gender roles, relations and equality*. In other words, gender analysis draws on demonstrated sociological research findings about the roots of inequalities between men and women and how these differences might be overcome.

While there are many different theories that help explain existing and potential inequalities between men and women, some basic theories that inform gender analysis include the following:

- Because gender is largely a **cultural and social construct**, gender roles and relations can and do change over time.
- The **gendered division of labour** is the starting point for many gender imbalances and inequalities in society.
- **Access to resources** is distinct from **control over resources**, and control over resources in virtually all societies is unevenly distributed between men and women.
- **Resources** include material resources, but also time, knowledge and information
- *De jure* gender equality does not necessarily translate into *de facto* gender equality.
- **Culture, attitudes and stereotypes** profoundly influence access to and control over resources, and thus the realization of de facto gender equality.

Gender analysis takes baseline theories such as these as its starting point.

### HOW FAMILIAR DO I NEED TO BE WITH BASELINE GENDER THEORIES?

A **gender analyst** must be capable of applying these theories to data and information and providing rigorous analysis, which uses these theories as a starting point.

Someone **commissioning gender analysis** must be familiar with these theories, so that they can competently evaluate both research proposals and the final analysis.

For full implementation of a gender mainstreaming approach, **all project/policy planners** must be capable of applying baseline gender theories to basic development decisions. Otherwise true sustainable development will remain allusive.

## Asking “Gender Questions”

Basic gender analysis of any kind begins by asking “gender questions.” In other words, it begins by making informed guesses about possible gender differences. Gender analysis then follows up on these questions by testing them using sound research methodology.

Traditional analysis often overlooks gender differences and gender-based impact because these differences are sometimes hidden below the surface. (Or, we are so used to them that we no longer notice them). A gender question therefore must look below the surface. Gender questions ask, for example:

- What are the potential gender inequalities hidden below the surface?
- What might be the complex reasons for gender disparities?
- What might be the complex effects of gender disparities?

Asking gender questions is the first important step for gender-based analysis.

### CASE STUDY: Asking Gender Questions in Relation to Changes to Hospital User Fees

Hospitals are going to start charging a small user fee for services. Traditional analysis assumes that this will improve the efficiency of services and everyone will benefit – men and women equally. But what gender impacts might be hidden below the surface?

We need to ask the following gender questions:

- Who uses hospital services more – men or women?
- Do women and men have the same level of disposable income to pay for these services?
- Who will be responsible for paying fees for children and elderly – particularly in single-parent families?
- Will fees mean that hospital stays will likely become shorter? Does this mean that sick people will now have to recuperate at home? Who will be responsible for their care?
- How will this impact women's economic, social and other lost opportunities? How will this impact children?

## Three Principles of Basic Gender Analysis

### 1. The „WHAT-WHY?“ Principle of Gender Analysis

The first criterion of basic gender analysis is the „what-why?“ principle. Analysts should point out *what* the difference between women and men is, but more importantly – *why* the difference exists. It is important to go *beyond* simply describing the situation with statistical data.

**EXAMPLE:** Simply noting that women represent only 38% of the economically active population does not highlight the important reasons *why* this disparity exists. Is it due to: cultural prohibitions? direct discrimination within the labour force? limited opportunities caused by low levels of education, poverty, poor health, unpaid work responsibilities? Cross-check with other data in order to support your claims.

If causes are unknown, further research needs to be undertaken. However, your conclusions might suggest a hypothesis, based on the baseline gender theories that inform your research. You might conclude, for example: “Although no research has been done on the causes of these disparities, low female participation is likely due to both direct discrimination within the labour force structure, as well as pervasive cultural norms which do not encourage women in the remunerated workforce. Further research needs to be undertaken to identify the precise causes of this phenomenon.” By doing this, you can educate policy makers about the likely “chain-reaction” effects of gender discrimination and inequality.

### 2. The „SO WHAT?“ Principle of Gender Analysis

The second criterion of basic gender analysis is the „so what?“ principle. Describing or noting gender disparities should be accompanied by an analysis of their impact on human development. Otherwise, policy

makers might not see why the difference is relevant. In other words, they might say: „Yes, there is a difference, but so what?“ Gender analysis needs to make this relevance clear!

**EXAMPLE:** If your research reveals that women are discriminated against in terms of which professions they can pursue, what impact will this have not only on women whose choices are limited but on the development of the nation as a whole? What might this mean in terms of flexibility of the job market, ability to increase economic outputs, and continued innovation within those professions? Keeping women and men segregated in the job market can seriously impede the nation’s overall economic development.

### 3. The „WHAT-HOW EFFECTIVE?“

The third criterion of basic gender analysis is the „what-how effective?“ principle. Research into the situation of women and men often mentions policies, laws, organizations, institutions or other initiatives intended to enhance gender equality or address inequalities. However, while it is informative to mention *what* these document and systems are, it is more instructive to note *how* and *how well* they function in practice.

**EXAMPLE:** Noting that the Constitution prohibits discrimination on the basis of sex, or that CEDAW has been ratified are important examples of *de jure* equality, but *de facto* equality also needs to be addressed: how are these legal provisions enforced in practice? Why does evidence of discrimination persist if it is “against the law”?

## GENDER IMPACT ANALYSIS IN PUBLIC POLICY: Basic Approaches

Gender impact analysis is one type of gender analysis that is used specifically in analyzing public policy. It can be used:

- To evaluate the potential effects of proposed changes to policy or law
- To evaluate the real effects of an existing policy or law

Gender impact analysis considers the effects of policies on the individual, rather than the household or community.

**Reliable gender impact analysis requires sound socio-scientific methodology.**

### SUGGESTED CRITERIA FOR DOING GENDER IMPACT ANALYSIS

Policies can impact men and women in different ways and at different levels. Potential obstacles to gender equality are also varied, including social, economic, cultural, legal and other obstacles. Gender impact analysis should strive to produce a comprehensive picture of these many factors. Gender impact analysts should therefore consider the following:

**Participation:** Are numbers of men and women equal e.g. in terms of the policy’s target group, participants of training, beneficiaries of subsidies, etc.?

**Resources:** Do men and women have equal access to resources in order to benefit from the policy? (Remember, resources include time, money, information, etc.)

**Norms and values:** How will gender stereotypes and gendered cultural and social norms and values affect men and women differently in the implementation of this policy? Will stereotypes and values be an obstacle for men or women in fully enjoying the benefits of the existing or proposed policy?

**Rights:** Do men and women have equal rights to benefit from the policy? Will the policy affect men's or women's rights directly or indirectly?

### Steps for Doing Gender Impact Analysis\*

While the scope and depth of gender analysis varies from situation to situation, the following steps should be considered in order to arrive at a comprehensive analysis of any proposed policy or legislation:

1. Identify the **position** of men and women prior to policy development with respect to participation, resources, norms and values and rights (i.e. the four criteria mentioned above.)
2. Assess the **trends** in men's and women's position independent of the policies proposed. In other words, if the policy is **not** implemented, what will the situation of men and women be, respectively?
3. Determine the **priority** to be attached to adopting policies which actively promote equality (as opposed to policies which are simply gender neutral), according to an assessment of the current degree of inequality and the impact of the inequality on men and women's lives. In other words, how crucial is the proposed policy, given the current levels of gender inequalities?
4. Assess the **potential impact** of policy with respect to participation, resources, norms and values and rights. You should pay attention not only to easily quantified impacts (for example, on numbers employed), but also to less easily measurable impacts (for example, on quality of jobs, job security or promotion prospects). Long term costs and benefits need to be taken into account as well as the immediate and short-term costs and benefits.
5. Assess the **impact** of the policy on **particular groups of women and men**. For example: What will the impact be on ethnic minority groups, parents or non-parents, various age groups, educational groups, employed or unemployed, regional groups or urban/rural groups etc.
6. Assess the **indirect impacts** of both the current state of gender inequalities and the proposed policies, paying particular attention to the indirect impact on **children**.
7. For policies which, in the initial gender impact assessment, are assessed either to have a negative impact on gender equality or to be broadly gender neutral, identify ways in which the policy could be **redesigned** or **re-specified** to promote gender equality.

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\* These steps have been modified based on those used by Lena Gonas (2002) in "Top Down – But How Far? Expert report on Gender Impact Assessment & the Employment Strategy." This report can be found at: [http://www.umist.ac.uk/management/ewerc/egge/egge\\_publications/GIA\\_sweden.pdf](http://www.umist.ac.uk/management/ewerc/egge/egge_publications/GIA_sweden.pdf). She uses the steps suggested in Sweden's Report on Gender Mainstreaming.

### 3 EXAMPLES OF WHAT GENDER IMPACT ANALYSIS CAN REVEAL:

#### 1) Did women benefit from an existing policy?

A gender impact analysis of new employment programmes in the Country X revealed that only 8% of funding for these programmes go to lone parents, of whom 95% are female. Yet 57% of funds go to young people, of whom only 27% are female. Therefore, while some vulnerable women (single mothers) are benefiting, others (young, unemployed women) are not. The policy should therefore be revised to address this target group.

#### 2) Will women benefit from a proposed policy?

A gender impact analysis of proposed changes to employment insurance in Country Y revealed that:

- Benefits for low-income, lone-parent families headed by women will actually increase by about 11%
- A Family Income Supplement will provide, on average, an additional \$30 per week to the benefit payment of 350,000 low-income families; about two-thirds of those receiving the supplement will be women
- Multiple job holders totalling 653,000 individuals will be fully covered by the system for the first time, of which 321,000 (49%) are women.

This policy would therefore promote greater gender equality (by increasing the economic resources of vulnerable women) if implemented.

#### 3) Will a policy have a mixed impact on men and women?

A gender impact analysis of the Working Families Tax Credit in Country Z showed a contradictory gender impact: on the one hand, the credit raises the income of single-parent families, the majority of whom are headed by women. On the other hand, the credit is detrimental to women who are the second wage earner in two-parent households.

## B. PLANNING, COMMISSIONING AND EVALUATING GENDER ANALYSIS RESEARCH

### Levels of Gender Analysis

Gender analysis can be performed at different levels for different purposes. Gender analysis can be a quick and cheap exercise, or a time and resource intensive endeavour. As a policy or project planner, you have to decide what degree of analysis is appropriate in the given situation. This will depend on economies of scale – balancing required resources against the need for in-depth results.

WHAT?	WHO?	HOW?	WHY?
1	2	3	4
Routine Desk Study	Project/policy planner + some baseline knowledge	Application of “gender questions” to existing data/knowledge	<ul style="list-style-type: none"> <li>• Provides an indication of data</li> <li>• Outlines probable cause and effect</li> <li>• “Flags” gender issues to watch out for (states a hypothesis)</li> <li>• Raises awareness of the issues for those conducting and reviewing the exercise</li> </ul>

1	2	3	4
Participatory Focus Group Exercise	Focus group and facilitator	Coming up with gender questions as a group and providing answers to them, based on existing knowledge of the group	<ul style="list-style-type: none"> <li>• Fosters participatory approach to planning</li> <li>• Provides a valid sample of data and cause and effect (can strengthen a hypothesis)</li> </ul>
In-depth Research Project	Researcher + population	Collection of new data to provide detailed analysis to “gender questions” established in the research Terms of Reference	<ul style="list-style-type: none"> <li>• Provides statistically sound data</li> <li>• Can reveal gender issues that were not previously identified</li> <li>• Can prove or disprove a gender issue hypothesis</li> </ul>

Depending on the scope and level of analysis you chose, the analysis will be either commissioned:

- **in-house (by you, or in-house gender expert); or**
- **outsourced (to individual experts, civil society groups, think tanks or commercial research firms)**

### Scope of Gender Analysis – Outputs

The scope of the gender analysis will vary from situation to situation. In all cases, the following three basic elements of gender analysis must be determined from the outset:

<b>I</b>	<b>Research question (hypothesis)</b>	<b>What do I want to know (or prove)?</b>
<b>II</b>	<b>Theoretical framework</b>	<b>What are the analyst’s baseline theoretical assumptions about gender relations and equality?</b>
<b>III</b>	<b>Methodology</b>	<b>How will the research question be answered?</b>

*Once you determine these three elements, it is crucial to determine:* What is the desired output of the research?

- **Situational Analysis:** If you have absolutely no data on a given subject, a situational analysis may be required. However, bear in mind that situational analyses often do not offer concrete policy recommendations.
- **Provision of Policy Options:** If your goal is the development of concrete policies, policy researchers and analysts should provide you with a “policy brief” that contains several policy options and highlights the advantages and disadvantages of each. These considerations should include questions of efficiency (cost-benefit analysis), efficacy (coverage, scope, sustainability), and extent to which gender issues are addressed: are needs of both men and women met? Are frameworks of gender roles and relations transformed?

*It is important that you specify what scope of analysis you expect from the research – otherwise you are bound to be disappointed!*

What Can GENDER ANALYSIS Give Me?	
<ul style="list-style-type: none"> <li>• <b>Description of Current Situation</b></li> </ul>	<ul style="list-style-type: none"> <li>- Gender analysis can describe the existing situation of individuals, families or other groups according to gender. Moreover, it can describe the context (macro situation) in which these people operate. This can include cultural, historical and geographical context; legal and policy contexts.</li> <li>- It can describe the activities of these people and the resources which they have access to and control over (the micro situation)</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Analysis of Current Situation</b></li> </ul>	<ul style="list-style-type: none"> <li>- Gender analysis can analyze the links between the macro and micro situations</li> <li>- It can show cause and effect of gender inequalities.</li> <li>- It can ask and explain: Why is the situation the way it is?</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Suggestions of Options</b></li> </ul>	<ul style="list-style-type: none"> <li>- Gender analysis can suggest measures (general or specific) for changing the situation based on the research findings.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Evaluation of Options</b></li> </ul>	<ul style="list-style-type: none"> <li>- Gender analysis can provide a cost/benefit analysis (not only in monetary terms) of proposed measures.</li> <li>- <i>It can ask and explain: What will happen/change if certain options are adopted?</i></li> <li>- It can present of “score card” or balance-sheet of various options in terms of their gender-equality and other benefits.</li> </ul>

## Commissioning Research

It is likely that you will not be doing the research yourself, but hiring/ commissioning someone else to do it for you. For this you need to be able to do the following:

- Prepare a Terms of Reference (TOR) for the research
- Invite researchers to submit their research proposals
- Evaluate research proposals
- Monitor the progress of the research and evaluate the research results.

While the researcher is *responsible* for the quality of the research, the project/policy planner is *accountable*. You must be clear about what you want and need, and available to discuss and reach consensus with the researcher on any unforeseen obstacles that might arise in fulfilling the terms of reference.

### A. TERMS OF REFERENCE

These should specify:

- Background of the assignment
- Objective of the research
- Specific research questions to be answered
- Necessary qualifications of the researcher

The following items can either be specified in the TOR, or agreed upon with the selected researcher(s):

- Timeframe
- Remuneration and reimbursement of expenses
- Methodology
- Presentation of results
- Copyright of / access to databases and analysis

**HELP WANTED: QUALIFICATIONS NECESSARY FOR GENDER ANALYSIS**

Whether your analysis is simple or in-depth, in-house or outsourced, the following capacity is needed for successful gender analysis:

- substantive expertise concerning the sectoral or policy issue (e.g. health issues, environmental issues, education issues, etc)
- gender expertise (i.e. professional and/or academic training in gender theory as pertains to public policy)
- specific technical expertise as demanded by the research question (i.e. economic modelling, cost-benefit analysis, etc.)

The appropriate balance of these three elements is crucial in order to produce useful and viable policy options. This may mean that you need to engage a team of researchers to ensure that all three bases are covered.

**B. EVALUATING GENDER ANALYSIS PROPOSALS**

Gender Analysis proposals should contain the following information. As a commissioner of this research, you should ask questions to your researcher/analyst about any of the following that are unclear:

- **Qualifications and background of researcher/analyst:** What is the educational background of the researcher? Have they done similar research before? Can copies of previous research reports be provided for your viewing? How rigorous is their understanding of gender analysis frameworks and baseline gender theories?
- **Research Question (Hypothesis):** What should the basic data collection uncover? What should an analysis of the data highlight? Will the data be extrapolated to provide concrete options for action and analysis of these options?
- **Theoretical framework and Axes of Analysis:** What baseline assumptions does the researcher espouse about gender relations and gender equality? It is important to ask this, because a researcher's own *biases and assumptions* about the differences between men and women and their roles in society can potentially influence (and distort) their research findings.
- **Methodology:** How will the data be collected and analysed? Questions you might ask include:
  - Will data be qualitative, quantitative, or both?
  - How will the research sample be selected?
  - What computer or statistical programmes will be used to analyse data?
  - If there are to be interviews, who will conduct them? How will they be structured?
  - If there is a survey, will it be piloted first? Can you review the questionnaire?
- **Data to be gathered:** What type of data will be generated by the research? Will you have access to (copyright over) the databases themselves?
- **Proposed presentation of results:** What sort of research report can you expect? Questions you might ask include:
  - What sort of narrative will accompany data tables?
  - How will data tables be disaggregated? (by gender, age, rural/urban, ethnicity, etc?)
  - If policy options are sought, how will relative costs/benefits of different options be presented?
  - If the research report is very long, will there be an executive summary (policy brief), that highlights the main findings and recommendations?

## Mainstreaming Gender into All Policy Research

You may not always have the resources to undertake extensive gender impact analysis for all proposed or existing policies. In order to be cost-efficient, you should consider ways of integrating (mainstreaming) a gender perspective into *all* policy research that is commissioned by the government.

### CHECKLIST FOR EVALUATING GENERAL RESEARCH PROPOSALS FROM A GENDER PERSPECTIVE:

- **Researchers:** Who will be involved in the gathering and analysis of data? Is gender balance and a gender perspective (expertise) ensured?
- **Subjects:** Will the situation of both genders be researched? Will data be disaggregated by gender?
- **Methodology:** What methodology will be used? Is it sensitive to both men's and women's particular needs? (e.g. confidentiality, sensitivity to some issues)
- **Analytical Axes and Theoretical Framework:** Does the research include gender as a important variable in determining social processes? Are other important axes for analysis considered (ethnicity, socio-economic status, geographical location, etc.)? What are the baseline assumptions about gender roles and relations (sexual division of labour, reproductive work, etc) that will inform the analysis?
- **Research Question and Analysis Spectrum:** Is a gender perspective deliberately highlighted in the research question(s)? Is the scope of analysis specified, so that you know what to expect from the results?
- **Credibility:** Have steps been taken to ensure that the research will be valid and credible in the eyes of all stakeholders – both women and men (i.e. consultations and opportunities for providing inputs and comments)?

