# DEVELOPMENT RESEARCH METHODS

## Week 7, Lesson 3: Gender-sensitive Indicators and Gender Analysis

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# Theoretical perspectives on women have changed in a number of ways

- From an undifferentiated population of women to the relationship between men and women, i.e., from '**women in development**' to '**gender perspectives**' which incorporate social relations and differentiation between women and men, and between women – not all women, nor all men, are equal;
- From the single role of women as reproducers to the **triple role of women**, i.e., with roles of reproductive, productive and community managing work;
- From **practical gender needs** to **strategic gender needs**;
- From women seen as **victims** to women seen as **actors** and **agents**;
- From a **top-down** to a **bottom-up** perspective; and
- The unit of analysis has changed from an emphasis on the **individual woman** and the **household** to **socially and ethnically distinct groups of women and men and the relations between them**.

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# What we will cover in today's lecture

1. From WID to Gender-Mainstreaming Gender Equality
2. Gender Analysis and Approaches to Gender Mainstreaming.
3. Gender-sensitive Indicators, Poverty and Power.
4. Contesting Perspectives-Mainstreaming and Women's Empowerment.

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# 1. From WID to Gender-Mainstream Gender Equality-1

- The changing approaches to 'women in development' illustrate the inter-dependence between theories and methods.
  - UN system has promoted gender issues through global summits, in gender policies, gender training materials.
  - Contribution of gender analysts and feminist researchers, example, Naila kabeer (1994, 2002), Ghita Sen (1985), Mary B. Anderson (1991, 1998) towards adoption of 'gender mainstreaming' and 'women's empowerment' in international development cooperation by multilaterals, bilateral agencies and NGOs.

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- The dominant gender analysis frameworks reflects empirical evidence from development cooperation in different societies over the years.

# 1. From WID to Gender-Mainstream Gender Equality-2

- Gender discourse has transitioned from WID to GAD.
- United Nations Fourth World Conference on Women in Beijing in 1995 adopted the Beijing Platform for Action with global agreement that gender equality is the goal, mainstreaming gender equality is the strategy.
- The mainstreaming strategy aims to situate gender equality issues at the centre of broad policy decisions, institutional structures, and resource allocations with respect to development goals and processes.

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# 1. From WID to Gender-Mainstream Gender Equality-3

The gender mainstreaming strategies: two perspectives

- ‘Mainstreaming’ strategies i.e. incorporating gender policies into conventional project and programme work

- ‘Agenda setting’ strategies aim to create the conditions under which women and men can challenge conventional patterns and structural inequalities and start to redefine gender initiatives.

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# Different Policy Approaches to Third World Women

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| Issues | Welfare | Equity | Anti-poverty | Efficiency | Empowerment |
|---|---|---|---|---|---|
| Origins | Earliest approach:<br>-Residual model of social welfare under colonial administration<br>-Modernization/ accelerated growth: economic development model | Original WID approach:<br>-Failure of modernization<br>-Influence of Boserup and First World Feminists on Percy Amendment<br>-Declaration of UN Decade for Women | Second WID approach:<br>-Toned-down equity because of criticism<br>-Linked to Redistribution with Growth and Basic Needs | Third and now predominant WID approach:<br>-Deterioration in world economy | Most recent approach:<br>-Arose out of failure of equity approach<br>-Third World women's feminist writing and grassroots organizations |
| Period most popular | 1950-1970: but still widely used | 1975-85: attempts to adopt it during and since Women's Decade | 1970s onwards: still limited popularity | Post 1980s: now most popular approach | 1975 onwards: accelerated during 1980s still limited popularly |
| Purpose | To bring women into development as better mothers | To gain equity for women in the development process | To ensure that poor women increase their productivity | To ensure development is more efficient and effective | To empower women through greater self-reliance |
| Needs of women met and roles recognized | To meet PGN* in reproductive role, relating particularly to food aid, malnutrition and family planning | To meet SGN** in terms of triple role-directly through state top-down intervention, giving political and economic autonomy by reducing inequality with men | To meet PGN in productive role, to earn an income, particularly in small-scale income generating projects | To meet PGN in context of declining social services by relying on all three roles of women and elasticity of women's time | To reach SGN in terms of triple role-indirectly through bottom up mobilization around PGN as means to confront oppression |

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*After* Moser, 1989: 1808
**Note:** MDGs point the most current approach to Gender and Development

***PGN-**Practical Gender Needs are needs identified by women and men which arise out of the customary gender division of labour.
****SGN-**Strategic Gender Needs reflect a challenge to the customary gender relations and imply changes in relationships of power and control between women and men .

# 2. Gender Analysis and Approaches to Gender Mainstreaming-1

- The purpose of gender analysis is to understand the mechanism underlying both dominant development problems and policy, programme and project interventions in terms of their implications for women and men, and for the relationship between them.

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I. Gender Mainstreaming Elements:

a. Clear policies and priorities of goals: at national and intervention levels
b. Gender mainstreaming strategies and gender analysis methods:
   i. A reasonable level of gender analysis specific to an intervention.
   ii. One or more clear goals relating to changes in gender equality
   iii. Some means of monitoring and reporting on the changes in gender equality with identifiable link to the intervention
   iv. Dialogue between a development agency and its partners, civil society organizations, etc.

# 2. Gender Analysis and Approaches to Gender Mainstreaming-2

c. Resources and Capacity:
   i. Human resources- Internal or external to an organization, making optimal use of national/local gender expertise
   ii. Gender equality training for own and partner agency staff-general issues on gender, including new topics such as 'masculinities' and 'femininities'.
   iii. Gender analysis tools-gender analytical frameworks, checklists, handbooks, etc.

d. Stakeholder analysis and identification of actors, e.g., 'beneficiaries', partner agencies, coordination offices, consultants

e. Institutional arrangements, mechanisms for promoting gender equality- from the national to the local programme e.g., gender units, gender focal points.

f. Sex dis-aggregated data and information is paramount to assess change in gender equality.

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# II. Gender Analytical Frameworks

| Framework | Focus | Tools |
|---|---|---|
| 1. Harvard Analytical Framework | Resource allocations for women and men | • Activity profile<br>• Access and control profile to resources and benefits for women and men<br>• Influencing factors |
| 2. People-Oriented Planning | Is an adaptation of the Harvard Analytical Framework for use in refugee situations | • Refugee Population Profile and Context Analysis<br>• Activities Analysis<br>• Use of resources analysis and an adaptation of Harvard *tool 2*- Women's socio-political profile compared to men's |
| 3. Moser Framework | Three concepts:<br>Women's triple role (reproductive, productive and community work) | • Gender roles identification/triple role<br>• Gender needs assessment<br>• Dis-aggregating control of resources and decision-making |
| 4. Gender Analysis Matrix (GAM) | To determine the different impact development interventions have on women and men | • Analysis of four 'levels' of society-women, men, household, community<br>• Analysis of four kinds of impact-labour, time, resources, socio-cultural factors |
| 5. Capacities and Vulnerabilities Analysis Framework | To help in planning aid in emergencies, and to meet immediate needs | • Categories of capacities and vulnerabilities<br>• Additional dimensions of 'complex reality' |
| 6. Women's Empowerment (Longwe) Framework | Analyses equality by sectors but concentrates on separate areas of social life | • Measures Levels of Equality<br>• Women's Empowerment |
| 7. Social Relations Approach | Analysis existing gender inequalities in the distribution of resources, responsibilities and power. | • Framework for conceptualizing, studying and implementing Empowerment<br>• The Sen-inspired framework- 'ability to exercise choice'.<br>• 'Resources', 'Agency' and 'Achievements' |

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# III. Challenging Gender Stereotypes

*After* Levy, 1990

| Challenging Stereotype Assumptions Made by Planners about the Household | | |
|---|---|---|
| **Household** | **Assumptions** | **Empirical and Methodological Challenge** |
| The structure of low-income households | Nuclear | High proportion of other household structures, e.g., extended families, women-headed households |
| The organization of tasks in the household | The man is the breadwinner<br><br>The woman is a housewife | Women and men involved in different roles depending on the gender division of labour in the context<br><br>Women's multiple roles: reproductive, productive, community managing and community politics roles |
| The control of resources and decision-making in the household | Equal access to resources<br><br>Harmonious gender relations in the household<br><br>Household is therefore treated as a unit | Often there is unequal access to resources for different household members<br><br>Gender relations are conflicting<br><br>Need for dis-aggregation of the household |

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# 3. Gender-sensitive Indicators, Poverty and Power-1

- Dis-aggregating core human development indicators by sex and composing various gender-related indices. E.g., gender-related development index, GDI.

- The Human Development Report (e.g., UNDP, 2003 and annual) includes the following gender indices:
  - Gender-related development index
  - Gender empowerment measure
  - Gender inequality in education
  - Gender inequality in economic activity
  - Gender, work burden and time allocation
  - Women's political participation

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# 3. Gender-sensitive Indicators, Poverty and Power-2

- Work on a gender-informed poverty analysis is prompted by ongoing work to monitor the Millennium Development Goals (and now SDGs) and develop Poverty Reduction Strategy (PRS) Papers.

- In order to integrate gender into the poverty diagnostic stage of the PRS is a step to generate data on the four dimensions of poverty (opportunity, capabilities, security and empowerment).

- A study of gender dimensions of poverty and their measurement would help inform an ongoing non-conclusive debate on the relationship between poverty and gender inequality.

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# 3. Gender-sensitive Indicators, Poverty and Power-3

- The required studies, both at the macro and micro level are difficult to undertake as access to documentation of gender dis-aggregated contexts is rather limited.

- The shifting policy approaches to women in development reflect contesting perspectives of what are relevant gender-sensitive or women-specific interventions.

- When it comes to understanding power and power relations between women and men, the influential analysts are Naila Kabeer and Jo Rowlands.

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# 3. Gender-sensitive Indicators, Poverty and Power-4

- Different forms of power in order to understand empowerment (Rowlands, 1997, 1999):
  - **Power over:** controlling power, which may be responded to with compliance, resistance or manipulation
  - **Power to:** generative or productive power which creates new possibilities and actions without domination
  - **Power with:** a sense of the whole being greater than the sum of the individuals
  - **Power from within:** the spiritual strength and uniqueness. Its basis is self-acceptance and self-respect

- Three dimensions to explore empowerment:
  - Personal
  - Relational
  - Collective

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# Indicators of the Gender Dimensions of Poverty and their Measurement

After Bamberger et al. , 2001

| Dimension of Poverty | Indicators | Measurement |
|---|---|---|
| **Opportunities** | • Time budget and time poverty<br>• Employment and labour force participation<br>• Capital and assets | • Household surveys, focus groups, and direct observation<br>• Household and labour market surveys, household surveys, records of credit and finance institutions |
| **Capabilities** | • Demographic indicators(infant mortality, life expectancy, etc)<br>• Education<br>• Health and nutrition<br>• Qualitative indicators of capabilities (culture, freedom and autonomy) | • Household and health surveys, clinic records, anthropometric studies, national and sectoral statistical records<br>• Household surveys, school records<br>• Household surveys, clinic records, participant observation, focus groups<br>• Focus groups, participant observations, national quality of life survey |
| **Security** | • Economic vulnerability<br>• Exposure to violence<br>• Social capital | • Household surveys, focus groups, Participatory Rural Appraisal (PRA) techniques such as timelines, and periods of stress, diaries<br>• Focus groups, participant observations, case studies<br>• Household surveys, inter-household and transfer studies |
| **Empowerment** | • Political empowerment<br>• Control over household resources | • Voting records, key informants, participant observation<br>• Household surveys, case studies, participant observation, key informants, focus groups |

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# 4. Contesting Perspectives-Mainstreaming and Women's Empowerment-1

## I. Arguments posed by proponents of Gender Mainstreaming :

a. It is critical to effectively use the global goals and recommendations for action in development cooperation.

b. It is important to improve the focus on legally binding commitments through international conventions, in particular the CEDAW (Convention on all forms of Discrimination Against Women).

c. It is important to distinguish between general development problems and challenges specifically relating to the promotion of gender equality.

d. Areas where change is needed:

- Regularly updating gender equality policies;
- Institutional arrangements;
- Sharpen policy dialogue and sector approaches;
- Competence development;
- Updating methodologies and tools, etc.

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# 4. Contesting Perspectives-Mainstreaming and Women's Empowerment-2

## II. Arguments by proponents of Women's Empowerment:

a. A discussion on how to understand women's situation. Women's empowerment is central in this discourse.

b. The argument against gender mainstreaming is that 'Gender mainstreaming is a policy adopted from above, progress in this matter will depend entirely on committed individuals' (Sida, 2002).

c. Gender agenda is often sidelined as a result of ambiguous strategies, with particular implications for women's empowerment.

- The discourse represents different theoretical and political points of departure. Structure and agency play an important role.

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# Kabeer's conceptualization of empowerment

| Levels of Empowerment | |
|---|---|
| 'Deeper' levels | Structural relations of class/caste/gender |
| Intermediate levels | Institutional rules and resources |
| Immediate levels | Individual resources, agency and achievement |

*Source*: Mikkelsen, 2005

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# Categories of composite indicators to measure empowerment

| Indicators | Variables with greatest weight | Example |
|---|---|---|
| **1. Direct evidence of empowerment** | Devaluation of women | Reports of domestic violence; dowry paid at marriage |
| | Women's emancipation | Belief in daughter's education; freedom of movement |
| | Reported sharing of roles and decision-making | Egalitarian gender roles; egalitarian decision-making |
| | Equality in marriage | Fewer grounds reported for justified divorce by husbands |
| | Financial autonomy | Currently controls her earnings |
| **2. Sources of empowerment** | Participation in the modern sector | Index of assets owned; female education |
| | Lifetime exposure to employment | Worked before marriage; controlled earnings before marriage |
| **3. Setting indicators** | Family structure amenable to empowerment | Does not now or previously live with in-laws |
| | Marital advantage | Small age difference between spouses; chose husband |
| | Traditional marriage | Large educational difference with husband; did not chose husband |

*After* Kabeer, 2002: 35-36

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# References used for this lecture


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For a comprehensive literature on the topics covered in this lecture it is also suggested that students go through the reference list of the above cited papers.