

GENDER MAINSTREAMING IN PRACTICE



A Toolkit

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Foreword

At the turn of the millennium, gender mainstreaming was a relatively new concept in Eastern and Southern Europe and the Commonwealth of Independent States (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 the first edition of **Gender Mainstreaming in Practice: A Handbook**.

When this handbook was first tested with practitioners in the summer of 2001, the response was tremendous. Acknowledged as a unique collection of practical guidelines and theoretical background information that provided a necessary hand-hold for taking up the challenge of gender mainstreaming in day-to-day work, the Handbook was translated fully or partially into many languages of the region, including Albanian, Latvian, Russian, Ukrainian, Turkmen, Uzbek, Slovak and Romanian, to name just a few. A modestly updated second edition was published to meet demand.

Considerable progress has been made in the area of gender equality in the countries of Central and Eastern Europe and the CIS since *Gender Mainstreaming in Practice: A Handbook* was first published. Yet, this has been matched by new circumstances and emerging challenges. This shifting terrain has demanded that our strategies for enhancing gender equality be flexible, innovative, and persistent.

It has become clear that the potential of gender mainstreaming is great and that it could be explored in new ways to do an even better job of meeting the needs of users. In addition, the demand from practitioners in both UNDP offices and our government counterpart institutions for effective tools that can facilitate gender mainstreaming has remained high. Therefore, in the summer of 2005, an experts' group meeting was convened in Bratislava. Based on the results of a survey of Handbook users and the experts' own recommendations, a major overhaul to the Handbook was initiated. This meeting marked the beginning of a two-year review and revision process made possible by the financial support of the Bureau for Development Policy, Gender Thematic Trust Fund. It is with great pleasure – and with renewed dedication to improving the lives of women and men, girls and boys in the region – that we bring you the third edition of *Gender Mainstreaming in Practice*.

The handbook has been expanded to become a Toolkit to include a larger diversity of tools, as it was acknowledged that not all sections would be relevant in all situations. The Toolkit is divided into two parts: the first of these is comprised of the methodological sections. Part two including the **Gender Briefs** has been made available to you on CD.

In an effort to make the Toolkit regionally specific and practically oriented, approximately 25 actual **case studies of experiences in gender** mainstreaming and gender initiatives from throughout the region have been collected and integrated into the *Toolkit*. A revised and expanded **Introduction** has been included that places gender mainstreaming firmly in the context of gender equality challenges and opportunities in Europe and the CIS. The section on **10 Steps for Integrating Gender Mainstreaming in Your Work** has been significantly edited and expanded to include case studies and examples relevant to the region. A new section **Gender Equality: Basic Principles** has been added as a "primer" for users with less familiarity with the key concepts and theories that ground gender equality policy. **Gender Analysis: A Brief Guide** is no longer an annex but a section in its own right. It has been substantially reworked and revised, and includes new case studies and examples. The collection of **Gender Briefs** includes new briefs on HIV/AIDS, Private Sector Development, Energy and Environment and significantly revised versions of Labour, Poverty and Macroeconomics and Trade. The brief on the Military and Defence has been revised to include a wider crises prevention and recovery perspective. All of the Briefs have been updated and revised by experts.

Finally, we found that the work of collecting case studies and examples in the region was more challenging than expected. While we collected many useful examples of gender interventions, the rare examples of fully mainstreamed projects underscored the fact that we still have a long way to go in mainstreaming gender into the projects and programmes. There is a large need to scale up the work on gender both on the regional and global levels.

As you can see from the list of acknowledgements, the production of this toolkit has demanded the work and devotion of many people during its drafting, peer review, and editing phases. We are tremendously grateful to everyone who shared their perspectives and skills through comments, feedback and advice, to make the toolkit into the diverse and rich collection of knowledge that it is.



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Introduction: Gender Mainstreaming in Southern and Eastern Europe and the CIS

Why a gender Mainstreaming toolkit?

How is gender mainstreaming relevant to the work that I am doing? Is it relevant for this region? Why should I do it? And, even if I understand its relevance, *how* am I supposed to implement it? What, concretely, do I need to do? These are questions commonly raised by practitioners engaged in public policy and development work, and these are the questions this toolkit addresses.

By means of introduction to this toolkit, the following pages provide information and guidance in four key areas:

1. About this Toolkit: What are its goals? Whom is it for? How should I use it?
2. What is Gender Mainstreaming?
3. Gender Mainstreaming in the Context of Europe and the CIS: Regional Challenges
4. Moving Forward in Gender Mainstreaming

1. About this Toolkit

The goals of this toolkit are:

- to present a comprehensive understanding of what gender mainstreaming is; and
- to provide detailed guidance on how gender mainstreaming can be put into practice.

The toolkit achieves this through guidelines, case studies, examples, suggestions, and the presentation of relevant information pertaining to the region.

Whom is the Toolkit For?

This toolkit is primarily designed for public policy and development practitioners who are not experts in gender issues, but who nonetheless are charged with the day-to-day responsibility of gender mainstreaming. These professionals might work within UNDP and other UN organizations on specific policy or development projects, or within national governments and other policy-making bodies. This toolkit is meant to guide these professionals in their work. Because most users will not be gender specialists, the language, examples, and detail of the toolkit are geared accordingly.

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

- Non-governmental organizations and advocacy groups can use it to monitor and support the actions of government and international organizations.
- Supervisors of policy makers and project staff will gain a better understanding of the ways in which gender mainstreaming will affect the work-plans of their staff, and can subsequently in-

corporate gender mainstreaming into their performance appraisal systems, while also allocating adequate budget resources.

- Gender specialists and consultants will find this handbook useful as a quick and succinct reference in their own work or when training others.
- Students will gain an appreciation for how gender mainstreaming works in practice.

While this toolkit contains information, case studies, and examples that will be of interest to all users in the international development and policy-making community, it has been designed specifically for practitioners in Southern and Eastern Europe and the Commonwealth of Independent States (referred to in this toolkit as “Europe and the CIS.”)

How Do I Use this Toolkit?

This toolkit is divided into two main parts:

- **Part I – Gender Mainstreaming Methodologies**

Part I of this toolkit provides practical guidance for gender mainstreaming in any policy area or sector. The sections included in Part I are:

- 10 Steps for Mainstreaming Gender into the Policy-making Process
- Gender Analysis
- Basic Principles of Gender Equality
- Glossary of Terms and Annex of Case Studies

10 Steps for Mainstreaming Gender into the Policy-making Process: This section describes the gender mainstreaming process, as divided into 10 stages that roughly correspond to the “life cycle” of a policy or a project. Each stage is described with the help of various tools, checklists, and examples. This section also presents one case study that runs through all 10 steps in order for users to gain a clearer appreciation for how gender mainstreaming might look in practice.

Although these 10 steps are presented as a cycle, it is recommended to begin with the step that is the most appropriate entry point for the task at hand. Although it is ideal to begin gender mainstreaming in the conceptualization stages of a policy or project, significant impact can still be made by integrating it later on. The various entry points are described in Part I.

Gender Analysis: A Guide: This section goes deeper into the most important aspect of gender mainstreaming—gender analysis. This guide provides a detailed understanding of what gender analysis is and practical guidelines for how to plan and implement gender analysis activities. Included here is also specific information on gender impact assessment (GIA), which is one common form of gender analysis, as well as related screening and assessment tools to aid the process of gender analysis in policy-making and programming. This guide contains various examples and case studies, and ends with a summary and conclusions.

Gender Analysis: A Guide is a key complement to both Part I and Part II of this toolkit, and should be used in conjunction with these first two parts as a more detailed perspective on this necessary and crucial part of gender mainstreaming.

Basic Principles of Gender Equality: The principle of gender mainstreaming begins with the acknowledgement that gender equality is a key and inalienable aspect of sustainable human development and the achievement of human rights. In order to successfully implement gender mainstreaming, a solid understanding of what gender equality means is therefore necessary.

The authors of this toolkit acknowledge that gender equality is a complex concept and that gender inequality has causes and effects that are equally complex. In order to better prepare practitioners who are not necessarily specialists in gender, or gender mainstreaming, this guide explores and explains these complexities in detail. To do so, this guide provides examples of how gender inequality manifests itself in many different dimensions of our lives. It also serves as a helpful refresher and reference for those with some experience in gender issues.

Glossary and Annex of Case Studies: The glossary is for your reference to the frequently used terms in the area of gender and gender mainstreaming. In the Annex of Case Studies you can find all the cases and examples used throughout the Toolkit for your easy reference as well as illustrations of what gender mainstreaming can mean in practice.

- **Part II – Gender Briefs: A Sectoral Approach to Mainstreaming (on CD)**

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

The step-by-step approach outlined in Part I of the toolkit can 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.

2. What is Gender Mainstreaming?

Gender mainstreaming is a comprehensive strategy aimed at achieving greater gender equality. This is attained by integrating a gender perspective into existing mainstream institutions and all programmatic areas or sectors (e.g., trade, health, education, environment, transportation, etc.).

In the United Nations system, gender mainstreaming was defined and adopted in 1997. The official UN definition of 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.”¹

UNDP has a two-pronged mandate for working towards gender equality: gender mainstreaming and women’s empowerment. Women’s empowerment measures may certainly figure as specific interventions within a gender mainstreaming approach. However, while capacity for gender mainstreaming is still being strengthened, it is important to pay specific and targeted attention to women’s empowerment measures.

¹ The Report of the Economic and Social Council for 1997. United Nations, 1997.

Gender mainstreaming is not only a question of social justice but is necessary for ensuring equitable and sustainable human development. The long-term outcome of gender mainstreaming will be the achievement of greater and more sustainable human development for all.

Clearly, a gender mainstreaming approach does not make obsolete the need for specific policies, programmes, or projects on gender equality. The level of intervention (from basic “gender sensitivity” to comprehensive, targeted programmes for women or for men) will depend on the specific needs and priorities revealed by a gender-sensitive situation assessment (i.e., gender analysis).

Gender Mainstreaming within Organizational Structures and Environments

As a comprehensive strategy, gender mainstreaming must also address the environment (corporate, office, etc.) 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.

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 men and women—both as actors in the development process and as its beneficiaries. Unlike a “gender neutral” approach to development, a gender mainstreaming approach does not assume that policies and interventions will affect men and women, boys and girls, in the same way.

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. Moreover, this same experience shows that men and women and boys and girls often have different needs and priorities, and that opportunities provided by policies and projects, as well as their outcomes, often affect these groups unequally. Gender mainstreaming seeks to redress this inequality. For these reasons, **gender mainstreaming has a distinct advantage** compared to both a “gender neutral” and a WID approach:

- Gender mainstreaming uses available resources in a way that ensures the greatest benefit for all – men, women, boys and girls.
- Gender mainstreaming identifies and uses opportunities for improving gender equality in projects and policies that would not have otherwise been considered gender issues.
- Gender mainstreaming can include concrete initiatives for women in strategic areas such as legislation, choice, and participation in decision-making, but can also address the hidden biases that lead to inequitable situations for men and women in all sectors of policy making.
- In operational terms, gender mainstreaming allows policy makers and practitioners not only to focus on the outcomes of gender inequality but also to identify and address the processes that cause it.

3. Gender Mainstreaming in the Context of Europe, Central Asia, and the CIS: Regional Challenges

Why Gender Mainstreaming in Europe and the CIS?

Although the post-socialist transitions have brought opportunities and benefits for some, there has also been an increase in levels of poverty, unemployment, social exclusion,² and polarization. While both men and women have experienced hardships during the transition period, women by and large have suffered greater losses socially, politically, and economically than men. It is important not to conflate gender with women, but it is also essential to note that in spite of the progress made in achieving greater gender equality, women continue to be among the poorest and most marginalized segments of the population in Europe and the CIS as well as in other parts of the world. Of the multiple layers of identity—including age, ethnicity, religion, class, disability, sexual orientation, and education—gender is one of the most important factors that determines how an individual is perceived in society, the roles they are expected to play as well as the access they have to resources, opportunities, and power to influence decision-making.

More than 15 years after the collapse of state socialism, there is now great diversity among the countries in Europe and the CIS. While several countries, such as the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, and Slovakia, are members of the European Union and have relatively strong economies and stable democracies, the situation in the Balkans and farther east in the CIS is different. The fact that twelve of the fifteen former Soviet countries and a number of those in Central and Eastern Europe are listed in UNDP's 'Medium Human Development' category³ means that they are facing some of the same challenges as those faced by other developing countries.

While these countries may not have wide gender gaps in literacy and educational attainment, nonetheless women in post-socialist countries encounter gender-based inequalities, some of which have emerged due to the policies of the transition period while others are due to the re-emergence of certain conservative ideologies and hidden biases that disadvantage women. For this reason it is important for policy makers and practitioners to embrace a gender mainstreaming approach in the design and implementation of policies in this region so as to better address the gender-based inequalities and forms of social exclusion.

Rapid Socio-Economic Transformations and Challenges

Some of the socio-economic and political policies promoted during the transition period failed to remove the disadvantages of women, such as their "double burden" whereby they are expected to earn household income in addition to caring for children and other family members; their lack of access to higher levels of government; and unequal pay and employment opportunities in the socialist systems. Instead, some of these liberalization and privatization policies, including the dismantling of social welfare systems and removal of subsidies for childcare, education, and health, actually intensified the gender asymmetry, social exclusion and inequalities. For instance, beginning in the 1990s women were forced out of the labour market in far greater numbers than men, and were pushed into lower paying jobs in the public sector or service industry.⁴ The loss of subsidies meant that accessible childcare became scarce and that access to health care and education became far more difficult.

² Social exclusion refers to the structural obstacles and institutional arrangements that deny some individuals, families and groups access to resources associated with citizenship on the basis of gender, age, ethnicity, etc.

³ UNDP (2005).

⁴ UNIFEM (2006: 9).

In addition to the negative consequences of these policies, conservative ideologies have re-emerged in various post-socialist countries leading to a redefinition of gender roles and relations. For example, violence against women (VAW), a problem that exists in societies throughout the world, has been exacerbated by growing poverty, social dislocation, and exclusion in many countries in Central and Eastern Europe and the CIS. Due to a lack of viable employment and affordable housing, women who are victims of violence often feel unable to leave an abusive relationship. While shelter programmes and hotlines have provided relief to a small number of women in the region, these approaches have often been designed in isolation as “women-only” problems that fail to consider the larger structural and institutional issues involved.⁵

Conservative ideologies not only restrict women’s opportunities, they also limit their access to resources. For instance, in Tajikistan many women, despite their formal rights to land, were excluded from land distribution as officials often turned down the applications of female-headed households. This has been especially problematic given the massive labour migration of men following independence, as a result of which a high percentage of rural women in Tajikistan have become responsible for a large share of farming.⁶

As a result of growing poverty, the post-socialist period has also seen a significant rise in temporary and permanent migration. Many women in Albania, Armenia, Azerbaijan, Georgia, Kyrgyzstan, and Tajikistan, among others, are left behind by husbands who travel abroad for work for months or years at a time. Not only are women-headed households disadvantaged, as discussed in the Tajikistan example above, but in some cases migrant men form second families and abandon their original families altogether, leaving them even more vulnerable to poverty and social exclusion.

In addition to legal migration, in recent years there has also been an increase in both the sexual trafficking of women and children and the trafficking of male and female labour migrants from the former socialist countries to Western Europe, the Gulf states, and sometimes even to the United States. Trafficking in all its forms is a relatively recent phenomenon in the post-socialist countries, which can be partly explained by the continued economic difficulties and increasing poverty in the ‘sending’ countries as well as the tougher immigration controls of the ‘receiving’ countries, thereby restricting legal migration and leading those who wish to migrate to seek out illegal channels. While men often become the victims of traffickers who charge exorbitant rates for illegal transport and work placements, those most at risk are the women and children who are trafficked for sexual purposes and who face sexual, physical, and psychological abuse in addition to economic exploitation.

Political Transformations and Participation

Although women had been crucial in the civil society movements of the late 1980s, immediately after the collapse of the socialist governments, women found themselves excluded from the new governments. The removal of the much maligned system of quotas in many of the post-socialist countries led to a drastic decline in the number of women in parliaments and ministries. In Armenia, for example, the removal of the quota system led to a significant decrease in political representation among women: In 1985, 121 of 219 members of parliament were women, while the number of female parliamentarians dropped to 8 following the 1991 National Assembly elections.⁷ The small percentage of women in parliament (approximately 3 percent) has stayed largely the same following subsequent parliamentary elections in 1995, 1999, and 2003⁸. The elimination of the quota systems

⁵ Ishkanian (2003).

⁶ Babajanian (2007).

⁷ ABA/CEELI (2002).

⁸ Democracy Today (2002).

can only partially explain this decline in female representation. Other factors, including, the strain of the double burden, gender role socialization, and the commonly shared belief that politics is “men’s work” and inherently corrupt and dirty have all contributed to the small number of women in public office and to the low levels of women’s participation in political parties.⁹

Women’s inadequate representation and small share in political power is a worldwide problem and not unique to the post-socialist states. What is striking about this region, however, is that while there has been a decline in women’s representation at the formal (national and local) government levels and in political parties, there has been an unprecedented increase in women’s participation in civil society in all of the countries in the region. This has created opportunities for women’s participation in the public sphere; but, as discussed below, this activism and participation have had limited impact on the design and implementation of policies and legislation.

Health and Social Welfare: Worrying Trends

These rapid social and economic transformations have created difficulties and anxieties for many in the region, which have led to a rise in a number of health problems—including very high levels of depression and coronary heart disease. While the traditional risk factors of bad diet, smoking, excessive alcohol use, and other diseases all play a part, studies point to additional factors, including poverty, social dislocation, and exclusion.¹⁰ Those most at risk are young and middle-aged men. In recent years, life expectancy for men has plummeted; and there is a growing gap between the life expectancy of men and women in many countries in this region. Russia is the most extreme case, where women are expected to outlive men on average by 13 years, whereas the average gap globally is around four to five years. Even in some of the new EU states, such as Estonia and Lithuania, rates of depression and coronary heart disease are quite high, and the life expectancy gap is still large as compared to other EU states.

In addition to these stress-related diseases, the former Soviet states have experienced the fastest growing rates of HIV/AIDS infection in the world. The spread of the disease is due to increased intravenous drug use (nearly 400 percent since 1989) as well as the growing number of young men and women who are involved in commercial sex work. Ukraine, Russia, Moldova, and Belarus have experienced alarming rates of growth, with some listing the figure of 1 million infected in Russia.¹¹ Due to labour migration, the disease is also spreading farther east to the states in Central Asia and the Caucasus.

These developments have serious implications for men and women alike. While men are clearly under stress and require assistance, women are also suffering from these ailments and related behaviours, such as the increased incidences of abandonment and domestic violence. Men’s alcohol abuse combined with the unequal gender division of domestic labour (even in households where men are unemployed) qualitatively worsens the poverty of women as they increasingly face the double burden of meeting the family needs in the home while earning an income outside the home. The ability of households to make ends meet is further exacerbated by men’s drinking, since spending on alcohol becomes a priority over spending on other family needs.¹²

If not properly addressed, the spread of HIV/AIDs and the large gap in life expectancy will also have serious consequences in the future. For instance, post-socialist pension reforms in countries ranging from Latvia to Kyrgyzstan, which punish early retirement and do not recognize informal work,

⁹ Kuehnast and Nechemias 2004.

¹⁰ Stone (2000).

¹¹ McAdams (2005).

¹² Tarkowska (2002).

combined with the life expectancy gap, significantly increase the risk that many women will be impoverished in their old age.

International, Regional, and National Legislation and Approaches: What Has Been Done?

In order to further incorporate gender mainstreaming into development and planning processes, it is important to consider legislation and programmes at the international, regional (e.g., EU), and national levels. Since 1991 various international agreements and programmes have been initiated to address gender equality and more gender-sensitive development. While all the states in the region have signed such documents as the UN Convention on the Elimination of All Forms of Discrimination against Women (CEDAW), progress is lagging due to the lack of enforcement of legislation. The situation is similar with the Millennium Development Goals (MDGs), which have likewise been accepted by all governments in the region. While Goal 3 of the MDGs specifically seeks to promote gender equality and to empower women, all eight goals have some gender dimension or anticipated impact on gender roles and relations.

At the regional level, accession to the EU has been an important factor for change. Given the importance of gender equality policies for the EU, before the agreements were signed all candidate countries had to meet the Copenhagen criteria from 1993, which required political reforms, economic transformation as well as legislative and social policy changes. The accession countries adjusted their legal and institutional frameworks to accelerate the transition to a market economy, strengthen human rights standards, and improve democratic, civic, and political policies and practices. While gender mainstreaming is part of EU policies, market reforms as well as neo-liberal policies (including cutbacks on social welfare spending) have meant that while certain progress has been made, there still remains much to be done.

As for the national level, there are various gender equality laws in place in the countries throughout the region. The problem is often not due to the absence of legislation, but rather to the proper enforcement and implementation of existing laws as well as the emergence of conservative ideologies that disadvantage women's access to resources (e.g., land) and opportunities. Often such ideologies and the practices they engender are tolerated, ignored, or dismissed by government officials. This allows for the perpetuation of hidden biases, which in turn hamper efforts to achieve gender equality.

Turning to national-level development programmes, the major tool for poverty reduction at present is the Poverty Reduction Strategy Papers (PRSP) process. The PRSPs, which were initiated by the World Bank and International Monetary Fund in 1999 as a new means of tackling poverty, have been implemented in over seventy countries, including the following 11 countries in the region: Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Kyrgyzstan, FYR Macedonia, Moldova, Serbia, Montenegro, Tajikistan, and Uzbekistan. Although in most societies women have fewer economic opportunities and less access to services than men, the poverty analysis in the majority of the PRSPs does not reflect the gendered dimensions of poverty and how poverty is differentially experienced by men and women. In some of the second-generation PRSPs, gender concerns are increasingly integrated, as is demonstrated in the Poverty section of this toolkit. However, much remains to be gained by mainstreaming gender fully into the PRSP process and goals. In particular, recognition needs to be given to how macroeconomic policies and national budgets can be gendered.

Turning to civil society efforts, as stated earlier, women continue to be very active in civil society organizations. Certain issues relating to gender equality and women's rights, including reproduc-

tive issues, sexual harassment, women's empowerment, leadership, and the trafficking of women, have been addressed by civil society organizations; but despite these efforts women have not been able to influence political developments and policy-making as much as would be expected given their levels of engagement. Without participation in political parties, representation in government, active involvement in the private sector, or access to financial resources, they have been unable to challenge the structural, political, and economic roots of these problems, or to address the hidden biases that perpetuate conservative ideologies, attitudes, and behaviours that are detrimental to gender equality.

What Remains to Be Done?

As stated, there must be better enforcement of gender equality legislation. This can occur through the combined efforts of civil society from below and international pressure from above, compelling national governments to improve their compliance and implementation of gender equality legislation. For instance, given the emphasis on PRSPs in a number of countries in the Europe and CIS region, it is important to mainstream gender in PRSP design, implementation, and monitoring. One example of how civil society was involved in the PRSP process in Serbia is presented in the section on Poverty. Gender budget analyses described in the section on Macroeconomics and Trade and gender-based monitoring and evaluation indicators can further assist in this process. Beyond the PRSP, it is important for policy makers and practitioners to mainstream gender into *all* development programmes, as such approaches will not only promote greater gender equality but they will also assist in poverty reduction and economic growth.

Another component to ensuring gender equality is better access for women to viable employment opportunities. Increased access to affordable childcare, wider availability of flexible work arrangements, transparent job evaluations, more equitable wages, along with better enforcement of employment and equal opportunity legislation are needed to promote greater gender equality in the economy¹³. All of these issues are addressed in the section on Labour.

While recognizing the important roles women play in civil society, it is essential to also increase women's participation in political parties and their representation in government, as brought up in the section on Democratic Governance. Quotas should not, however, be seen as a panacea to cure all ills; on the contrary, quota systems must be combined with greater application of gender analysis, women's leadership and empowerment training, and education and mentoring for young women in order to address the gender imbalances and inequalities in politics and government.

Greater international, regional, and local cooperation is needed on issues such as migration and trafficking. Prevention through information and education campaigns is important, but psychological counselling, skills training, and income-generation programmes are also needed to aid in the reintegration and rehabilitation of returnees. At the same time, the root causes of trafficking should not be forgotten. A gender mainstreaming approach in poverty reduction, local development, and human rights and justice—all areas addressed in this toolkit—are of great importance in building the foundation for people to develop their capabilities and to reduce their vulnerabilities. Given that many sexually transmitted diseases, such as HIV/AIDS, are spreading in the region due to increased intra-regional migration, poverty-driven commercial sex work, and intravenous drug users, the multi-sectoral approach to HIV/AIDS is highlighted in its own section as well. Finally, as shown in the Health section, whether discussing access to health care or better health education, prevention, and treatment, a gendered approach is important given the different ways that men and women experience illness and treatment.

¹³ UNIFEM (2006).

Conclusion

At the beginning of this introduction, several questions were posed: How is gender mainstreaming relevant to the work that I am doing? Is it relevant for this region? Why should I do it? And, even if I understand its relevance, *how* am I supposed to implement it? What, concretely, do I need to do?

It should now be clear that gender mainstreaming is very relevant to every practitioner engaging in development and public policy work: Policies and projects are not gender neutral. If the ultimate goal of policies and projects is to improve the lives and environments of the people they intend to serve, no one can afford to ignore gender mainstreaming. Without careful attention to how such policies and projects can and do affect men and women and boys and girls differently, the best possible outcome cannot be achieved. Without gender mainstreaming, resources cannot be allocated where they are most needed. Most importantly, economic hardship, poor health, the effects of environmental degradation, and other problems will extend further and last longer than they need to. Gender mainstreaming is a key tool for addressing these problems *now*, by specifically examining *who* is effected and *how*. Moreover, unlike earlier approaches to addressing gender inequalities in development policy, gender mainstreaming:

- Allows policy makers and practitioners not only to focus on the outcomes of gender inequality but also to identify and address the processes and circumstances that cause it.
- Identifies and uses opportunities for improving gender equality in projects and policies that would not have been otherwise considered gender issues.
- Sustains concerns for gender equality throughout the entire project or policy cycle, thus ensuring that mutually enforcing systems are put into place and that they are appropriately monitored and evaluated. This means that attention to gender can move beyond being a “token” sentence in a project document, and can instead bring real and sustained benefits to men and women.

Despite certain progress, gender equality remains a critical concern in Europe and the CIS. The fast pace of change and some of the unexpected consequences of open borders and the free movement of goods, people, and information means that this is no time for complacency. Gender mainstreaming needs to be a key tool for addressing these challenges.

In terms of concrete implementation, this toolkit is offered as a “one-stop shop” to guide practitioners through both the theory and practice of gender mainstreaming. Regional examples and case studies highlight both challenges and solutions to gender mainstreaming in practice. The authors hope that these concrete illustrations will provide the basis for an on-going dialogue among practitioners in the region who will continue to share their successes and learn from the experiences of one another.

Most importantly, the authors realize that gender mainstreaming is not a “one size fits all” prescription that can be applied the same way, to the same degree, in all situations. Given the diversity of the Europe and CIS region, it will be important to take into account social and cultural specificities when designing policy and programmes relating to gender. Moreover, obstacles to gender mainstreaming vary in different circumstances, and thus creative ways to implement gender mainstreaming must continue to be developed. Again, by drawing on examples from a variety of countries in the region, this toolkit will equip users with concrete ideas and inspiration for developing solutions to their own specific challenges.

Yet, while this toolkit is a valuable tool for individual practitioners, successful implementation *demands* that gender mainstreaming be an integral part of a broader development and public policy strategy. Individual practitioners will have a significant impact on the success of gender mainstreaming, but they can only go so far without the support of politicians, donor organizations, and other key decision makers. Therefore, in order to deliver the results that the men and women in our communities deserve, it is crucial to push forward the following agenda:

- Strategies for achieving the Millennium Development Goals on gender must be implemented, and specific regional and national goals must also be articulated and achieved.
- A commitment to gender equality must be not only clearly articulated in the national development plans of all countries, but real political will for achieving gender equality must be created and nurtured.
- Concurrently, sufficient resources must be allocated for achieving these goals.
- Responsibility for gender mainstreaming cannot be assigned to rank-and-file civil servants; managers and key government decision makers must be made aware of the benefits of developing realistic gender mainstreaming strategies, and they must be held accountable for ensuring that these strategies are implemented.
- Similarly, bilateral and multilateral development partners must ensure that gender mainstreaming is not relegated to gender-specific projects only, but that it becomes an integral dimension of all forms of development assistance.
- Appropriate gender mainstreaming training must be offered not only once, but as a sustained part of training programmes for all development and public policy practitioners at both operational and higher decision-making levels. This toolkit provides an excellent basis for such training and learning processes.

Gender mainstreaming is not a fad or a fancy piece of development jargon. It is a concrete way to bring real change and benefit to the lives of men and women and boys and girls throughout the region. The rights, livelihoods, well-being, and very lives of people are at stake. So the real question is: How can we afford *not* to make gender mainstreaming a reality?

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Gender Mainstreaming: Ten Steps for Mainstreaming Gender into the Policy Making Process

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Introduction

Gender mainstreaming is the integration of a gender perspective and gender analysis into all stages of design, implementation, and evaluation of projects, policies, and programmes.

This part of the toolkit 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 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 Ten 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. Deciding on a Course of Action: Designing Policy Interventions and Budgets
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 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 use resources effectively. Gender mainstreaming is a necessary process for achieving both gender equality and other policy goals in the most effective and efficient manner.

Link: See Gender Analysis

CASE STUDY: Enhancing Local Governance

In order to illustrate how gender mainstreaming might work according to these 10 steps of the policy cycle, a case study has been developed and included in the following pages. References to this case study are found in shaded boxes.

The case study included here concerns a project for enhancing the effectiveness of policy making at the local government level. It is based upon the actual experience in Central and Eastern Europe, the Balkans, and Central Asia, but it does not describe the experience of any one country in particular. Statistics and facts used in this case study are based on the reality of the region, but they do not present actual data from any one country or group of countries.

Background Information

This case study takes place in the fictitious country “the Eurocian Republic.” As part of a decentralization process, the Eurocian Republic has recently been rezoned into 82 municipalities, each with its own local government. These 82 municipalities are divided among 4 larger administrative regions: North Region, South Region, East Region, and West Region.

Now that the rezoning is completed and more responsibilities have been decentralized to the local level, it is important to ensure that the municipal governments will be able to effectively administer their local programmes and budgets. Therefore, a project to enhance the effectiveness of local governance was initiated. This project is a cooperative effort amongst the Ministry of Local Affairs of the national government, the Union of Local Governments, and two international partners. The Union of Local Governments is an organization that is funded by the Ministry of Local Affairs, but has its own independent decision-making structure. It represents the interests of local governments at the national level, and has the mandate of ensuring exchange of information between local and national government, and amongst the local municipalities themselves.

This case study is particularly instructive because it looks not only at the content of projects or policies, but also at the policy-making process itself, at the local level.

STEP 1

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

Step 1 concerns the people involved in the policy-making process. These individuals, along with their values and understanding of gender issues, will significantly affect the outcome of your policy or project.

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

1. 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. This also introduces a series of “checks and balances” against competing viewpoints. Negotiating these multiple viewpoints will result in better policy-making.

2. Is there gender balance in all institutions and bodies involved?

If strong gender imbalance exists among stakeholders or the core policy-making group (for example, less than 30 percent of one sex), you should take measures to involve more of the under-represented gender – be it men or women. Introduce quotas for participation, if necessary. Good representation of both genders is a sign of democratic, inclusive policy-making, where all viewpoints can be heard.

3. 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, civil society organizations/community groups, or development partners. Bringing this expertise aboard is mainstreaming at its most basic level.

4. What specific knowledge and skills can different stakeholders contribute?

When bringing “gender stakeholders” aboard, you should consider what sort of contributions they can make to your policy-making or project development process. For example, line ministers and other elected politicians can help build political will, while researchers, academics, and statistics offices can provide valuable quantitative data. NGOs and other community-based organizations, moreover, will be able to provide a direct link to men and women in the community and can help identify and articulate the needs and wishes of those individuals.

GENDER MAINSTREAMING TOOL: Gender Sensitive Stakeholder Matrix

This matrix provides a checklist of potential gender-sensitive stakeholders, and suggests ways in which they may positively contribute to the gender mainstreaming process.

Stakeholder Group	S, PD	W/M	A	D, GA	PW	F, PS
Gender Focal Points in other ministries and governmental departments	.			.		.
Development partners with a gender equality mandate
Governmental or independent economists with gender expertise	.			.		
Male and female representatives of private sector interests	
Women's or gender NGOs or community-based organizations
NGOs or community-based organizations (CBOs) that represent men's gender interests
Relevant sectoral or "special interest" organizations that have an interest in or experience with 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 or other relevant departments	.			.		
Politicians who support gender issues			.		.	.
Statisticians or other data collectors with experience in gender statistics				.		

Legend: S, PD = Policy strategization and concrete policy development, W/M = Connection to the real needs and experiences of men and women in the target policy group, A = Advocacy and building support among the broader public, D, GA = Data inputs and provision of gender analysis, PW = Support in strengthening political will, F, PS = Assistance in securing financial and other practical support

CASE STUDY: Who are the Decision Makers?

During the early stages of the Eurocian Republic's local government initiative, a task force was charged with developing the project. This task force included members from the Ministry of Local Affairs (2 representatives), the Union of Local Governments (3 representatives), and the international partners (2 representatives).

Initially, the gender balance on the task force was approximately equal (4 men and 3 women). However, nobody on the task force had any in-depth knowledge of how gender issues might be relevant in municipal good governance. Therefore, they invited one non-governmental representative from the Coalition of Gender Equality NGOs and one academic representative - a sociologist with expertise in gender and rural affairs - to become members of the task force. Additionally, one of the international partners invited his organization's Gender Focal Point to join him at task force meetings as an observer. These new members were able to assist the task force in all aspects of gender mainstreaming—from understanding the gender dimensions of the issues at hand, to identifying key partners who could strengthen the gender perspective during the implementation stage.

Moreover, the taskforce identified the following key points in the earliest stages of project development:

- Of the 82 municipalities, only 9 had a female mayor and only 17 had a female deputy mayor.
- Social, health, and education services in all municipalities were primarily provided by women.
- The Coalition of Gender Equality NGOs had partner organizations in 45 local municipalities.

The task force decided to keep these important facts regarding gender balance and participation of gender stakeholders in mind as they planned their course of action.

STEP 2

Mainstreaming a Gender Agenda: What Is the Issue?

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

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

For example, the subject of your policy-making initiative might be increasing the supply of potable water to rural communities. As you move through the gender mainstreaming process, this subject will need to be examined from a gender perspective in order to discern where, why, and how specific gender mainstreaming initiatives need to be applied. At this early stage, however, you are only approximating the extent to which gender is likely to be relevant to your issue (further analysis will happen later in the process). The following question will help you to provisionally establish the “gender issues” of your subject:

Does this issue affect men and women in different ways?

Experience has shown that in almost all cases, the issue does 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 further investigated (see Steps 4 and 5). Gender analysis is a vital part of clarifying the precise gender dimension of the issue (see the Gender Analysis chapter). The Gender Briefs in Part II can also help you identify the “gender issues” of various development problems

In Step 2, you are beginning this process by identifying likely or potential “gender issues.” In terms of the example given above, at this point you might identify the fact that the placement of potable water sources greatly influences the daily time allocations of various family members, as women are often most responsible for water collection. Thus, it is highly likely that the issue of potable water provision does indeed affect men and women in different ways.

While at this stage you will not yet be identifying specific gender issues that require policy solutions, Step 2 should introduce an appreciation of gender-related aspects of seemingly “gender-neutral” issues.

CASE STUDY: What is the Issue?

Thanks to the input from their gender experts, the local governance task force identified the following general ways in which their policy issue (i.e., enhancing effectiveness of local government) might affect men and women differently:

- **Low female participation and low representation of women’s experience in governance:** The vast majority of mayors and deputy mayors (i.e., key decision makers) in the Eurocian Republic were men. It was therefore likely that the viewpoint of women and women’s needs were not fully taken into consideration when making key policy decisions. Furthermore, this meant that women would be far less likely to directly benefit from any activities aimed at enhancing the capacity of mayors and deputy mayors.
- **Lack of awareness by policy makers of gender impact on social policy:** To the best of the task force’s knowledge, local governments had received no training in gender equality issues.

According to a small NGO study (see Step 4) local government officials were largely unaware of how gender was an important factor in the provision of municipal services. There seemed to be little awareness of how poverty, access to education and health services, and energy and environmental issues might differently affect men and women in their municipalities.

- **Lack of systems and mechanisms to ensure equal distribution of resources:** The task force believed that local government expenditures should benefit the entire community and provide specific assistance to those with the greatest need. At the same time, limited research showed that certain groups of men and certain groups of women were more vulnerable to poverty and other hardships. This meant that methods needed to be developed to ensure that policy making was addressing the needs of these men and women in particular.

The taskforce decided to keep these potential gender issues in mind when planning their intervention, in order to ensure that men and women would benefit equally from it – both as direct beneficiaries from specific project activities, but also as indirect beneficiaries (i.e., the men and women of the local populations that the municipalities serve).

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 of the policy issue. It is also equally important to make this gender dimension explicit in your policy goal. To do so, you need to identify gender-related goals that are corrective (those goals that correct the gender-blindness of policies and projects) and transformative (those goals that integrate a broader commitment to enhancing gender equality through the policy or project). Note, as well, that some goals are both corrective and transformative.

Corrective Goals:

- **Does the goal address the needs and concerns of both women and men?**

Many project or policy goals are “gender blind”—i.e., they do not account for the fact that men and women often have different needs and concerns. Corrective goals thus deliberately seek to address the needs and concerns of both genders. If men or women are disadvantaged in the given situation, then the policy goal should seek to redress this imbalance.

For example, if women are being infected by HIV at a faster rate than men, any project or policy on HIV prevention that does not seek to address the needs and concerns of women as different from the needs and concerns of men would be ineffective.

These goals are thus “corrective” in that they correct gender-blindness by drawing specific attention to the needs and concerns of female target beneficiaries and of male target beneficiaries.

Transformative Goals:

- **Does the goal include a broader commitment to changing the institutions, attitudes, or other factors that hamper 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. Again, if, for example, women are not being adequately reached by HIV-prevention policies, it could be that existing cultural norms or institutional structures are in fact preventing women from being able to act on prevention strategies. If so, the goal should be broadened to address these elements as well. In other words, in this example, the goal would be not only to target women more directly, but also to change the context in which men and women can care for their own sexual health.

These goals are thus “transformative” in that they are about transforming the institutions and structures (social, political, economic, cultural, etc.) of the policy context, 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 Gender Analysis booklet) and are ready to develop concrete policy interventions.

CASE STUDY: What is the Goal?

Before considering the gender dimensions of the project, the local governance task force had decided that the overall broad goal of their initiative would be:

- to enhance local governance to ensure targeted, more effective and efficient policy making that responds to the concrete needs and situations of men, women, boys, and girls in local communities.

in order to ensure this overall goal was gender-sensitive, it was reworded in the following way:

- to enhance local governance to ensure targeted, more effective and efficient policy-making that responds to the concrete needs and situations of local populations.

Given the gender dimensions identified in Step 2, the task force further identified the following as potential gender-related goals for any local governance initiatives they might develop:

Corrective Goals:

- To increase the knowledge of municipal policy-makers on the ways in which socio-economic issues differently affect men and women, and boys and girls, in their communities.
- To establish systematic means for determining the gender impact of municipal policies and resource allocation.
- To ensure equal participation of men and women in all aspects of project planning, implementation and monitoring.

Transformative Goals:

- To increase the representation of women at the highest levels of local government.

The taskforce noted, however, that although the “corrective goals” were meant to ensure that men and women benefited equally from the initiative, they felt that all of these goals were indeed transformative since they dealt with the structural and institutional aspects of the public policy system. In other words, fulfilling the corrective goals would have far-reaching implications for the systemic nature of the gender-based power structure in their communities as well.

Moreover, the task force also noted that the transformative goal of increasing the representation of women at high levels of local governance might likely fall outside the direct scope of their current initiative, although an increase in such female representation might be an indirect effect of the project.

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 of your policy or project interventions, ensured these are gender sensitive, and considered other potential gender-specific goals your policy or project might adopt.

In Step 4, “Mapping the Situation”, you must start thinking about refining your potential policy interventions. In order to do this, it is important to have an inventory of information that will affect your proposed policy or project. This information specifically asks about the gender-related dimensions in this project or policy issue:

- What information do you have about how this issue affects men and women differently?
- What information do you not have?
- What projects or policy interventions related to this issue have already happened?
- What projects or policies are currently in place that relate to this issue?
- What other interventions related to this issue are planned?

Answering the above questions will help you focus on “filling in the gaps” by commissioning or undertaking necessary research and planning complementary initiatives. It will also help to avoid duplication.

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: 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 do an inventory of what information you have or do not have, as well as prior on-going and planned interventions. You do not require any additional financial resources to perform this exercise.

Time required: The 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 to several 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 CSO activities

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

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.

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?*)

Link: Gender Analysis, in the section 'Asking Gender Questions'

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 ¹			
Sectoral or Policy Issues →	Issue 1	Issue 2	Issue 3, etc.
Gender Questions →	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?	What are the "gender questions" of Issue 2? etc.	What are the "gender questions" of Issue 3? etc.
What Do You Know? ↓			
Indicators (quantitative and qualitative)	Are there any indicators that are regularly monitored that answer the gender question? What are they? Who keeps track of them?		
Research Reports available	Do you have any research reports that answer the gender question? Do any of your colleagues?		
Govt. Legislation	Is there any government legislation that addresses Issue 1? Is the gender dimension explicitly addressed here?		
Govt. Policies and Programmes	What policies and programmes address issue 1? Do they also take the gender dimension into account?		
CSO Projects	Do you know of any CSO projects that deal with issue 1? Do they include the gender dimension?		
Donors' Activities	What donor activities address issue 1? Are the gender issues addressed?		

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.

¹ Adapted from S. Tadjbakhsh, Presentation to UNDP Latvia, April 2000.

CASE STUDY: Mapping the Situation for Enhancing Local Governance

After taking note of the gender dimensions and gender equality potential of their project, the Enhancing Local Governance task force had to collect information that could systematically describe the current situation in respect to these gender and local government-related issues.

The following page, therefore, shows a map of the information collected by the task force. This information was used in order to understand where a future initiative would make the most impact, while also complementing current efforts by CSOs and other groups in this area.

NOTE: The information in some boxes has been summarized for the purposes of this brief illustration. When undertaking this exercise, please use as much space as needed to fully list all known data and information.

Local Government Capacity in the Eurocian Republic			
Sectoral or Policy Issues →	Participation and representation in the highest levels of local governance	Knowledge of differential impact of key social policy issues (poverty, health, education, energy, and environment) at the community level	Effective local public policy systems and mechanisms
Gender Questions →	Do men and women equally participate? If not, what are the barriers to equal participation?	How do key social policy issues affect men and women differently at the community level? What is the level of awareness of local government about differential gender impact?	Are the different realities of men and women systematically addressed by current local government policy systems and mechanisms?
What Do You Know? →			
Indicators (quantitative and qualitative)	11% of mayors are female 21% of deputy mayors are female No known data on reasons for this discrepancy.	A selection of key indicators: Women more at risk for poverty. Men's life expectancy significantly lower than women's. Rise in number of girls not attending school in East and South regions. No gender data on energy and environment available. However, CSO report (see below) shows that only 15% of local politicians think gender equality is an important issue.	No data on how effectively public policy systems can address needs of men and women. Research done by an anti-corruption group showed that 67% of respondents did not believe that elected officials used resources effectively to address the greatest and most pressing needs in the community (but gender issues not addressed here).

Local Government Capacity in the Eurocian Republic			
Research Reports available	See National Report on Status of Women (limited data).	See National Human Development Report, National Report on the Status of Women (although weak in terms of local-level data). See Poverty Assessment (compares situation in four administrative regions) CSO "Women Fighting Poverty" conducted a survey of elected politicians in 10 municipalities on their attitudes towards gender equality.	See Consultant's report on Needs Assessment for Decentralization (it points to some areas where local government capacity needs to be built, but does not address gender dimension). Anti-corruption group report on public's perception of efficiency and effectiveness in government resource allocation (but gender issues not addressed here). Five municipalities have conducted different types of surveys of their own capacities and awareness, but gender issues not addressed.
Govt. Programme	No current programmes.	Various health and economic programmes at the municipal level that specifically target men or women.	No current programmes.
Govt. Policy/ Legislation/	Constitution and various international legal commitments (e.g., Convention on the Elimination of All Forms of Discrimination Against Women) confirm obligations to guarantee equal opportunities for men and women.	National Development Plan, National Poverty Alleviation Strategy deal with certain vulnerable groups but gender receives very little attention. New draft policy on "Education for All" notes need to combat shrinking enrolment of girls.	Transparency Act stipulates certain checks and balances to ensure that public funds are used appropriately – applies to local government as well.
CSO Projects	CSO "Women's Rights are Human Rights" has projects in all four regions to help women enter local politics.	Total of 38 CSO projects identified that provide specific assistance to vulnerable women or vulnerable men at the municipal level. These are primarily in the areas of health, social services, and economic empowerment. Majority of projects are in West and North regions. Seven gender equality CSOs identified whose activities include seminars for local government officials.	Seven gender equality CSOs identified whose activities include seminars for local government officials.
Donors' Activities	Donor projects to strengthen participation of women in politics at the national level, but nothing at the local level.	Nine bilateral initiatives identified (in cooperation with CSOs) to provide assistance to vulnerable women in various municipalities.	Recent donor financing for a gender-aware budgeting project at the national level in certain line ministries, but nothing at the local level.

GENDER MAINSTREAMING TOOL: 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:

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 therefore begin by finding out if such an overarching gender equality policy or policies exist.

Secondly, you should review whether any such policy 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.

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.

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: 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:

- Is there adequate basic legislation that prohibits discrimination on the basis of sex (constitutional law, anti-discrimination act)?
- Does any legislation explicitly discriminate against men or women?
- Is there evidence that implementation of legislation may result in indirect discrimination against men or women?
- Were gender experts consulted in framing the legislation?

NOTE: What if I have Insufficient Information to Successfully Complete These Exercises?

It may be the case that filling in the inventory table in the mapping exercise tool is very difficult, as you do not have access to the information needed. Similarly, a policy or legislative review, for the tools for policy and legislation audit may prove difficult because of a lack of systematized databases or interdepartmental information sharing.

If this is the case, instead of concluding that your attempts were unsuccessful, you should treat this as a learning and advocacy opportunity: What sort of information-sharing systems would be necessary to be able to answer these questions? How could such systems be implemented or advocated? In other words, a “failed” inventory can actually be the impetus for an important aspect of the gender mainstreaming process: establishing information-gathering and sharing mechanisms to track activities related to gender issues.

In terms of your current project or policy, lack of systematized information does not mean you cannot move ahead. It just means that you may have to accommodate revisions to your proposals further down the line, as new information comes to light. This is a normal part of the policy or project process.

Link: See also brief on Human Rights and Justice: Legislation.

Link: See also Drafting Gender-Aware Legislation in the publications section of the UNDP Regional Centre for Europe and CIS web site at: <http://europeandcis.undp.org>

STEP 5

Refining the Issue: Research and Analysis

“Mapping the Situation” (Step 4) will have underlined where a gender-mainstreaming perspective is specifically 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 also have 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 means you need to undertake gender analysis – i.e., either you will need to conduct general research in your policy area that integrates a gender perspective, or you will need to conduct specific research on one or various gender dimensions linked to your policy area.

This phase involves:

- Specifying the research question(s)
- Designing and undertaking the research OR
- Calling for research proposals and outsourcing the research
- Evaluating and drawing conclusions from the research

Gender analysis is a key part of gender mainstreaming. Learn more about the various levels of analysis, methodologies, and how to undertake such analysis in the Gender Analysis chapter that is part of this Gender Mainstreaming Toolkit.

Link: See also Science, Research, and Information & Communication Technologies: Part II.

CASE STUDY: Results of the Mapping Exercise

Building on the results of the mapping exercise (Step 4) undertaken by the Enhancing Local Governance task force, the following research needs were identified:

1. Research undertaken during the preparatory phase (i.e., before the project design was finalized):
 - **Situation of men and women at the local level:** A consultant was hired to go through all existing data on social policy issues in order to create one unified report that could describe the different situation of men and women in respect to these issues at the local level.

In support of this objective, the consultant was also asked to come up with a set of standard indicators that could be used by all municipalities to paint a picture of the differences between the situation of men and women in areas of health, sustainable livelihoods and poverty, education, and energy and environment. Special indicators were also to be developed to show the comparative situation of boys and girls.

- **Survey of attitudes and knowledge:** The NGO “Women Fighting Poverty,” which had already conducted a survey of elected politicians in 10 municipalities on their attitudes towards gender equality (see Step 4), was contracted to extend this survey into an additional 30 municipalities. In addition to asking the officials about their attitudes on gender equality, the survey was re-designed in order to determine their actual level of knowledge about how key issues affected men and women in their municipalities differently.

(The results of this survey were also used as a benchmark for evaluating how attitudes and knowledge changed thanks to the project – see Step 9: Evaluation.)

2. Research to be undertaken as part of project implementation:

- **Local governance policy-making audit:** The task force decided that they would need to perform a systems and processes audit of policy making at the municipal level in order to determine:
 - How policy priorities were determined
 - How budgets were allocated (by whom and according to what criteria and priorities)
 - What opportunities existed for consultations with local populations and specific stakeholder groups?
 - What means were used to evaluate the effectiveness of policies and the allocation of resources?

However, because this research had implications not only for gender equality specifically but in fact spoke to the main goal of the project, the task force decided to undertake this research as Phase I of the actual project. Specific questions and concerns related to gender were integrated into the research component of Phase I. These included:

- Are systems and processes in place that enable an evaluation of women's and girls' needs as distinct from men's and boys' needs?
- Are systems in place that invite or require consultations with local gender experts, women's groups, and/or gender equality advocates when determining policy and budget priorities?
- Are systems in place that allow policy makers to evaluate expenditures in terms of their impact on women and girls, and men and boys, separately?

3. Research that would not be undertaken as part of this project:

- **Barriers to women's access to political participation:** While the mapping exercise (see Step 4) revealed there was a critical lack of information about why women were not better represented in the highest levels of municipal government, the task force decided this question was beyond the scope of the project at hand.

However, the need for more research and action on this issue was noted and communicated widely, so that it could be addressed through different projects or initiatives.

Link: See also Gender Analysis, Part I.

STEP 6

Deciding on a Course of Action: Designing Policy Interventions and Budgets

By this stage, you are likely already considering some general ideas for interventions that will help you attain the broad goals you articulated in Step 3. Now you will have to decide on the most appropriate course of action.

Crucial Considerations for Policy Options

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

efficiency – How can I balance desired outcomes with limited resources?

effectiveness – How much of the situation will I be able to influence through policy intervention, and to what degree?

gender equality – How and to what extent can I address social and historical disparities between men and women?

other cross-cutting goals - How and to what extent can I integrate a human rights perspective, advance environmental protection priorities, and redress other social inequalities (relating to minorities, rural and urban groups, groups living in extreme poverty, etc.)?

All types of impact of each option need to be assessed. After weighing these considerations carefully, you will be ready to formulate your intervention.

Note that the process of defining and refining a final policy intervention often involves some moving back and forth between Steps 5 and 6 – i.e., research and situation assessment and deciding on a final course of action. Moreover, external factors may restrict your options or highlight additional challenges that need to be addressed. For example, there may be political considerations, budgetary restrictions, or other conditions placed on resource allocations by donors or international financial institutions. While many of these considerations may be beyond your control or scope of influence, your objective is to propose the best and most gender-equitable policy or project you can. Even if you are unable to control the ways in which it may be amended, restricted, or expanded, you can propose a gender equality benchmark in your policy or project draft that can be used and referred to during the advocacy and approval process.

Gender Impact Assessment

Ideally, a “gender impact assessment” should also be conducted for each option. This should consider the following key questions²:

- ✓ 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 male and female stakeholders perceive the option in terms of its costs, benefits, acceptability, and practicality?

² Questions adapted from “Gender-Based Analysis: A Guide for Policy-Making” prepared by Status of Women Canada (1998).

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?

If you are unable to conduct a full-scale Gender Impact Assessment for each policy option, at the minimum a Gender Impact Assessment should be conducted for the course of action you finally settle on. This is crucial in order to anticipate any unexpected ways in which the policy or project might fail to address current gender inequalities –or how it might even make these inequalities worse.

Link: See also Gender Analysis: Gender Impact Assessment for more details

Once all analyses and assessments are completed, you will be ready to finalize your plan of action. This will entail preparing the actual policy or project document and the required budget.

GENDER MAINSTREAMING TOOL: Gender Mainstreaming Checklist for Project or Policy Documents

- ✓ **Background and Justification:** Is the gender dimension highlighted in background information to the intervention? Is all data in the situation analysis disaggregated by sex? 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 men and women?
- ✓ **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 Steps 1 and 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 men and women participate equally in the implementation? (See Step 1)
- ✓ **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 assessed 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)

CASE STUDY: Policy Interventions and Budget

During Steps 4 and 5, the task force gained a great deal of very valuable information that allowed them to refine the focus of their proposed intervention, and decide on the specific ways in which gender equality considerations would be showcased.

The main objectives (not specifically related to gender) of the project were decided upon as follows:

1. **Systemic changes:** To identify opportunities and implement strategies for making changes in policy-making processes, to ensure that policies are effective and targeted, and that policy makers are accountable.
2. **Capacity building:** To enhance the capacity of local policy makers through various forms of training and learning in three areas: Situational Analysis; Budgeting; and Impact Assessment of Policies.

Thanks to the gender mainstreaming process, the design of the project was supplemented in the following ways:

Objectives:

- The project document made explicit the fact that enhancing gender equality and reducing inequalities in the situation between men and women were key aspects of effective local governance.

Activities and Budget

Amendments to Systems changes activities:

- Design and institution of mandatory public consultations and gender impact consultations during the design phase of major local policy initiatives.
- Establishment of Gender Focal Points within municipal government and allocation of resources for special training of the Focal Points.
- Allocation of budget for review of information and statistics systems to include tracking of key gender equality related indicators.

Amendments to Capacity building activities:

- Securing additional funds for a comprehensive training module on gender mainstreaming in municipal public policy-making (training + preparation of a gender mainstreaming handbook).

- Securing additional funds for including a component on gender-responsive budgeting within the budgeting training module.

General Project Implementation Processes:

- Allocating funds for a gender expert to participate in the local governance systems audit.
- Allocating funds for project personnel to receive training in gender mainstreaming.
- Inclusion of a gender expert as a voting member of the Project Steering Committee.
- All Terms of Reference for personnel to be hired with project funds to include “knowledge of gender issues” as either a mandatory or desirable qualification (depending on the nature of the job).
- Creation of a mandate to ensure that all data collected in association with the project is sex-disaggregated.
- Creation of a mandate to ensure that participants in training and learning activities be made up of no less than 30 percent women or 30 percent men.

The official project document included summaries of the gender-related research undertaken in Step 5 as important annexes for justifying the critical need for attention to gender within the project.

Link: See also the Gender brief Macro Economics and Trade and Gender Responsive Budgeting in the publications section at: <http://europeandcis.undp.org>

STEP 7

Advocacy Strategies: Gender Matters!

One crucial aspect of gender mainstreaming involves developing advocacy strategies that will help you gain support for your gender mainstreaming initiatives. 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 information that highlights, 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 (men and women), and the nation as a whole. Well-defined justifications and arguments will increase your chances of receiving financial and political support for any planned interventions.

The “Added Value” of Gender Mainstreaming

Advocacy strategies for adapting a gendered approach and for promoting gender equality in all projects and policies generally fall into one of the following six 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: These strategies stress the value of democratic principles and basic human rights, which demand gender equality. Justice strategies 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 (CEDAW) 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 constitutional laws.

While experience has unfortunately shown that the justice approach alone is often insufficient to convince governments to mobilize adequate resources, these justifications 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 has proclaimed gender equality to be one of their shared values.

Credibility and Accountability: Credibility strategies remind decision-makers that men and women each make up half the population. Therefore, any data, policy, or recommendation that does not recognize and address both sexes equally is not credible. If a policy does not account for the entire population, it can ever only be a partial solution. These strategies are useful for justifying gender im-

pact 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 strategies remind governments of their responsibility to ensure sustainable human development. As such, they must be accountable to the population and further the interests of all its members – both men and women. A failure to address gender equality issues is also a failure of governments to be accountable to all citizens.

Furthermore, gender-sensitive interventions hold 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 Sustainability³: These strategies 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 so will ultimately suffer in the medium and long-term. This is an approach that addresses the macro aspects of development – i.e., the welfare and prosperity of a nation as a whole.

These justifications are particularly effective because they address the bottom line: money. We often tend to put fiscal considerations before many others. Thus, it is important to prove that an investment in gender equality is a wise economic investment in the country as a whole. Global studies have proven the overall efficiency arguments,⁴ and these can assist you to make your case, as will any national research you might have as well.

Closely linked to efficiency strategies are sustainability strategies. Because gender mainstreaming adopts a “human development” perspective, which has the long-term objective of creating a 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: Increased attention to gender equality issues will improve the lives of individual men and women. In a democratic society based on principles of social inclusion and human security, 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, families and societies 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, hardship for one sex will negatively affect other social actors as well. For example, the negative effects of depression in men or poor employment opportunities for women affect all members of a family, including children and partners.

³ Care should be taken, however, when using efficiency strategies to avoid stressing that women are an “under-utilized resource.” As Diane Elson has noted, the problem for many women is that they are in fact “over-utilized” (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, which will ultimately result in increased levels of development and prosperity.

⁴ See specifically the World Bank Policy Research Report Working Paper Series on Gender and Development.

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

Alliance: Alliance strategies 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 approach 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: Lastly, all of the above approaches are strengthened when the links between them are highlighted. Gender equality can in fact produce a “chain reaction” of benefits. The chain reaction strategy shows how investment in gender equality 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. (Similarly, these strategies highlight how inequalities spread from individuals to infect the well-being of their families and communities as well.)

At the same time, mainstreaming should also remain aware of chain reactions that might produce negative gender equality effects. For example, the hasty adoption of affirmative action in hiring practices might bring backlash and even greater exposure of women to harassment in their place of work. 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 approach can be used to convince decision makers that mainstreaming must proceed in a strategic and holistic manner.

CASE STUDY: Argue your Case

Many key justifications for including a gender dimension in the Enhancing Local Governance project existed. These included:

Justice & Equality: The Eurocian Republic is a party to CEDAW and a signatory of the Beijing Platform For Action. Given the great discrepancies that exist between men and women in the Eurocian Republic in terms of health, poverty, education, and other key policy areas, the failure to include attention to gender equality in this project would in effect be a violation of these international commitments. It is crucial to keep reminding our governments, local and national, that until men and women have equal opportunities and are in equal situations, to maintain the status quo is the same thing as promoting inequality! It is the obligation of governments to find and make use of opportunities, such as this one, to address inequalities between men and women.

Credibility & Accountability: Earlier research done by an anti-corruption group showed that 67 percent of respondents did not believe that elected officials used resources effectively to address the greatest and most pressing needs in the community. While the project as a whole aimed at creating more accountability for resources, including the gender components and commitments greatly enhance that accountability. Moreover, given that great disparities between men and women in relation to poverty, health, and education had been documented (see Step 4), this project would have no credibility unless it specifically addressed these inequalities.

Efficiency & Sustainability: Greater efficiency is a key justification for the inclusion of specific gender components into this project. The whole project turns on the need for better, more efficient policy-making – through enhancing the ability of local policy makers to make informed decisions on how to use resources in an efficient, targeted, and most effective manner. Because there are great discrepancies in the way men and women are affected by policies at the local level, targeted and efficient policy-making is not possible without taking these differences into account.

While some opponents of the project argued that the gender-specific activities in the project required greater resources and thus reduced the efficiency of the project, this claim was not substantiated. In fact, the inclusion of the gender-specific activities and objectives required a budget increase of only an additional 6 percent, which was relatively easy to secure and justify. This is in comparison to an approximate additional 30 percent that would have been required to implement the gender-focused training modules in a smaller, stand-alone project. By integrating the gender mainstreaming and gender-responsive budgeting training into this larger project, limited resources were maximized and the overall outcomes were greatly enhanced, as the gender-based training reached a far greater audience than it would have in a stand-alone project.

Quality of Life: Because this project is a human and institutional capacity-building project, the “quality of life arguments” are not as obvious in terms of the project’s direct impact. However, research in the Eurocian Republic has clearly demonstrated that policy outcomes at the local level are *not* gender neutral: for example, women are at higher risk of poverty, girls’ enrolment in schools is declining in the East and South regions, and men’s life expectancy is critically low. Building the capacity of local governments to respond to these and other challenges through better targeted policy interventions will undoubtedly have the spin-off effect of improving the quality of life for individuals currently suffering from these and other hardships or undesirable situations.

Alliance: Undoubtedly, as noted in the “credibility and accountability” arguments, this project will greatly enhance the accountability of local governments for their administration of public resources. The gender dimensions of the project – in particular the attention to gender impact assessment and gender-responsive budgeting – add an additional layer to this accountability, thus further enhancing these accountability mechanisms. This will be an extremely attractive selling point for bilateral donors wishing to cost-share projects at the municipal level. Similarly, these accountability mechanisms will be a key strength for municipalities to highlight when applying for loans and structural funds from major donors such as the United Nations and European Union bodies, who place great emphasis on attention to gender mainstreaming in their review of projects and funding applications.

How do I Challenge Resistance to Gender Mainstreaming?

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 addressing this resistance. Tips for dealing with resistance include:

- 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.

- It is particularly difficult to respond to questions such as, “Why should gender equality be a priority in a time of economic hardship?” 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 of reminding them that they too have a responsibility and a role to play in and much to gain from ensuring gender equality.
- 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 that can be replicated in the future.
- Unfortunately, sexual harassment and unprofessional attitudes towards people, especially women 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. The three aspects of monitoring are:

1. Levels of Monitoring
2. Gender-Sensitive Monitoring Plans
3. Gender-Sensitive Targets and Indicators

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 (e.g., through opportunities to update their gender knowledge and skills, and discuss gender issues in a non-judgemental environment)?

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 (e.g., gender experts) 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)

Gender-Sensitive Targets and Indicators

Targets

We set targets so that we can keep our goals in sight. 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

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

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

NOTE: 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.

Types of Indicators: There are many different ways to classify indicators. This 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
Checklist indicators	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 processes, statements of political will, commitments. Simple and cheap data collection.	Lack qualitative aspect. Sometimes a question of interpretation.	<ul style="list-style-type: none"> ✓ Is a gender mainstreaming policy in place? ✓ Was a gender expert consulted in production of the report?
Statistics-based indicators	“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"> ✓ Male: Female ratio of incidence of HIV ✓ Male: Female unemployment levels
Indicators requiring specific forms of data collection	Require specific forms of data collection (sociological surveys, focus groups, interviews, etc). Require 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"> ✓ % of population that feels women should be primarily responsible for childcare ✓ % of job advertisements in newspapers that show gender bias

Qualitative and Quantitative Indicators: Being aware of the different uses and sources of qualitative and quantitative indicators can help you design indicators and collect data.

Qualitative Indicators	Quantitative Indicators
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.	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:	Common Sources:
<ul style="list-style-type: none"> • public hearings • focus groups • attitude surveys and interviews • participatory appraisals • participant observation • sociological and anthropological fieldwork 	<ul style="list-style-type: none"> • censuses • labour-force surveys • administrative records • target population-based sociological surveys⁵

⁵ Adapted from: *Progress of the World’s Women*, (UNIFEM 2000), which adapted it from the Canadian International Development Agency, 1996.

CASE STUDY: Monitoring

The process of monitoring the project Enhancing Local Governance from a gender perspective was made much easier because gender issues were already taken into consideration during the project design stage. This monitoring process had three main components:

1. Project Monitoring Relating to Gender-Specific Objectives and Activities: Again, because gender was taken seriously during project design, monitoring the achievement of gender-related objectives was very straightforward. Primarily, this was a question of fulfilling the plans set out in the project document, according to the timeframe set out in the work plan. These targets were as follows:

Systems Changes to Local Governance:

- Design and implementation of systems to ensure gender impact consultations
- Establishment and training of Gender Focal Points for all municipalities involved in the project
- Establishment of a set of key gender-related social policy indicators and systems to track them

Capacity-Building:

- Development and implementation of a gender mainstreaming training module
- Inclusion of gender-responsive budgeting section in the budgeting training module

It was the responsibility of the Project Manager (and a part of his Terms of Reference) to report specifically on the progress towards attaining these gender-related objectives in his regular reports to the Project Steering Committee.

2. Monitoring Gender Mainstreaming in Project Implementation Processes: Monitoring project implementation according to gender mainstreaming principles was also for the most part straightforward, since certain quantitative targets were already set out in the project document. These included the following:

- Equal participation of men and women in project training activities (no less than 30 percent men or 30 percent women)
- Ensuring adequate gender expertise for all project personnel (specified in their Terms of Reference)

Ensuring that all human data collected during the course of the project was disaggregated by sex

Again, the Project Manager, according to his Terms of Reference, was responsible for ensuring the fulfilment of these targets and reporting on them to the Project Steering Committee.

3. Gender Mainstreaming Monitoring Officer: However, it was recognized that these matrices would only allow the Project Steering Committee to verify “checklist type” indicators (i.e., whether or not activities had been implemented) and would not allow them to keep a gender-sensitive eye on the qualitative aspects of their implementation. For this reason, a Gender Mainstreaming Monitoring Officer was designated (in fact, in this particular case this was the Gender Expert who was part of the Project Steering Committee).

This Officer’s job was to hold informal interviews and/or administer informal surveys with all levels of project participants (project staff as well as primary project beneficiaries) in order to determine if the project was being conducted in a way that was gender-equitable, respected the views of men and women equally, and sought to provide equal opportunities for men and women.

This Officer reported back to the Project Steering Committee every other month. If she noted any problems related to gender equality in project implementation, the Project Steering Committee strategized about how to address these. For example, the trainers for the gender-responsive budgeting section of the Budgeting Module indicated that the time allotted for gender-responsive budgeting had been reduced by the Budgeting Module Team Leader from one whole day of training to only three hours. They felt this indicated a lack of commitment to the gender objective. In order to address this problem, the Project Steering Committee spoke with the Budgeting Module Team Leader and, as a result, the time allotment for the gender-responsive budgeting section was increased.

The Gender Mainstreaming Monitoring Officer was also responsible for providing a summary report on gender mainstreaming for the final project evaluation, and she served as a trainer and resource person on gender issues for all staff involved in the project.

STEP 9

Evaluation: How Did We Do?

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.

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)

CASE STUDY: Evaluating the Project “Enhancing Local Governance”

In terms of evaluating the achievement of gender-related project objectives and gender mainstreaming objectives, the monitoring checklists created in Step 8 were effective for these purposes. However, while these checklists were able to provide a quantitative report of gender-related achievements, they did *not* illustrate the qualitative impact of the project in relation to gender equality.

In order to gain a better picture of the project’s qualitative impact, a comparative study was done using some of the data collected before the project began, and comparing it with data collected after project completion. This became known as the “Entry and Exit Surveys on Attitudes and Knowledge.”

Description of the Comparative Study “Entry and Exit Surveys on Attitudes and Knowledge”: Prior to beginning this project, the NGO “Women Fighting Poverty” was contracted to survey elected officials in 30 municipalities about their attitudes to gender equality and their actual level of knowledge on how key issues affected men and women in their municipalities differently (see Step 5). Those interviewed during this “Entry Survey” represented three different levels of involvement in the project: direct (participated directly in capacity-building or systems-changing activities); indirect (their municipality participated in project activities, but they were not personally involved in training activities); or no involvement (their municipality did not participate in the project). At the close of the project, this NGO was asked to contact the people they had interviewed for the “Entry Survey” and perform a follow-up assessment. The goal was to determine to what extent their attitudes or knowledge had changed (if at all), and what differences, if any, existed between the three types of interviewee.

The results of this comparative study showed:

- Attitudes towards gender equality had changed positively in all groups, but most significantly among those directly involved.
- Substantive knowledge about how men and women are affected differently by social policy issues had increased very marginally in the “direct involvement group,” and had not increased at all in the other two groups.

Thus the most important conclusion drawn from these findings were:

- Although the project had made a positive impact in terms of raising awareness about gender equality and gender mainstreaming in general, it had not succeeded in equipping participants with the necessary substantive knowledge to be able to make key policy decisions in a gender-

informed way. Furthermore, since attitudes improved in all groups, not just those involved in the project, it was likely that society in general was becoming more aware of gender issues through media and other gender-related initiatives, which was considered positive.

As a result, the key recommendation for future and follow-up action was to provide follow-up thematic training for municipal policy makers in the following areas, identified by the evaluation as key areas for future action:

- Poverty survival strategies for men and women
- Employment options for men and women
- Time-use surveys: how men and women use their time differently
- Men, women and local energy needs
- Men, women and waste and water management
- Health promotion for men and women
- Boys, girls and barriers to education
- Reducing risky behaviour for boys and girls

Moreover, because policy makers experience turnover, it was necessary to institutionalize this knowledge in some way. Therefore, it was strongly recommended that information packets on each of these subjects be produced and made available to all municipal policy makers and employees.

At the same time, because the project's "systemic changes" objectives had created systematic opportunities for consultations with gender experts and NGOs during policy-making processes, it was concluded that the knowledge of local policy makers about gender issues would continue to improve through exposure to these consultations.

STEP 10

En-Gendering Communication

While “communication” figures as the last step in this gender mainstreaming guide, communication considerations themselves need to be “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.

It is very important to note that communication is not simply the neutral transfer of information. Communication also includes such strategic goals as awareness-raising, advocacy, promoting transparency, and sharing good practices. Good communication strategies and practices that take into account the different needs and situations of men and women (as providers, audiences, and subjects of communication) is a crucial aspect of gender mainstreaming.

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 include⁶:

- Do men and women read different publications?
- 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?

⁶ Questions adapted from “Gender-Based Analysis: A Guide for Policy-Making,” prepared by Status of Women Canada (1998).

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 the 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.

CASE STUDY: Engendering Communications

After the close of the Enhancing Local Governance project, the following on-going communication initiatives were initiated in order to maintain the momentum built by the various gender-related aspects of the project:

- The experience in gender mainstreaming for this project was collected in a comprehensive report by the Project Manager. This was made available to everyone involved in the project, and was also used as a case study at several international seminars and conferences on local governance.
- An electronic list-serve was established for all of the Gender Focal Points in municipal government. This was a way for them to share information, best practices, and questions with one another using the internet.
- Many municipal governments asked their various municipal departments to include a section that highlighted progress towards gender equality in all future annual reports.
- One municipal government began a project that would give an annual prize to the best piece of local journalism (radio, television, and print) that addressed questions of inequality between men and women.
- The Union of Local Governments established a small resource library that collected both national and international reports, case studies, and other resource material on gender equality at the municipal level. Many of these reports were made available electronically on the ULG’s website, so that interested people would not have to travel all the way to the capital city in order to make use of these resources.

References

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Gender Equality: Basic Principles

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Introduction

Gender inequality remains a regrettably common feature of all of our societies, yet the way in which individuals experience gender discrimination varies greatly. This is because inequality is caused by many factors other than gender alone – notably economic status, race or ethnicity, religious affiliation, age, physical or mental disability, and sexuality. Situational factors such as systemic poverty, environmental degradation, or rural neglect can also lead to serious hardship and inequality.

While this means that the experience of gender inequality is different for everyone, we can still talk about certain common features and basic principles of gender equality. In order to address any situation or experience of gender equality, it is crucial to have a solid understanding of these basic and common principles.

This section is designed to explain the basic principles of gender equality in order to build a common ground of understanding before moving into more specific issues such as policy-making, thematic linkages to gender, and the details of gender analysis.

What is Gender Equality?

Gender equality is defined in many different ways. One way to approach this concept is by breaking it down into five main components:

- rights
- opportunities
- value
- situation and outcome
- agency

Rights

Gender equality means that both men and women should have the same rights, and be equal before the law. (This is known as “de jure,” or formal gender equality). These rights are articulated in international conventions, such as the Convention to Eliminate All Forms of Discrimination Against Women (CEDAW); in national constitutions; and in legislation and other normative documents. Granting both men and women the same legal rights is the cornerstone of building a society in which men and women enjoy equality.

BOX: The Right To Protection From Domestic Violence

Legislation in Europe and Central Asia has made many significant steps towards ensuring greater equality between men and women, but some important gaps still exist. For example, in Tajikistan in 2005, domestic violence was still not considered a crime under the law. At the same time, recent studies indicate that at least two thirds of Tajikistani women suffer from domestic violence. As a result, women in Tajikistan are denied the right to be free from violence. Ensuring that both men and women have equal protection under the law is a crucial first step towards ensuring greater equality between men and women.

Opportunities

While the provision of equal rights can establish “de jure” (legal) equality between men and women, true gender equality requires more than legal guarantees. In order to ensure “de facto” (practical) equality between men and women, these laws need to be put into practice. In reality, many social, cultural, economic, and other barriers exist that prevent women, and men as well, from being able to fully enjoy their legal rights to equality.

For this reason, gender equality must also be about equality of opportunity. In other words, neither men nor women should face any barriers to learning, working, or participating in politics, the community or family simply because of their sex. Both sexes should have the same opportunities to access employment, resources, knowledge and information, and services, and to live healthy and happy lives. Men and women should likewise be in a position to be able to make genuine choices about their own work and welfare, and should have equal opportunities to make and influence decisions about themselves, their families, and their communities.

BOX: Time = Opportunity

Time is an important resource, and although both men and women have 24 hours in a day, time-use surveys in countries throughout the region reveal a similar pattern: *Women have less free time than men.* This is primarily because unpaid care work falls almost entirely to women, which is very time-consuming, and in many cases it is coupled with women’s wage-earning responsibilities as well.

For example, a time-use survey conducted in Estonia in 2000 revealed that while women spent slightly fewer hours than men at paid work, their overall hours of work significantly exceeded those of men once unpaid work was considered as well.

Lack of time can serve as a significant barrier in terms of accessing all sorts of opportunities – from participating in politics or starting a business, to accessing health services or educational opportunities. Being “time-poor” signals an inequality of opportunity.

See more examples on the UNECE gender statistics web site: <http://www.unece.org/stats/gender/>

Even in cases where equal opportunities are formally ensured through law and policies, men and women may still encounter barriers to enjoying truly equal opportunities. The practical operation of institutions (ranging from the household to the state), attitudes and stereotypes about gender roles and relations as well as traditional and cultural practices all greatly influence the existence of these opportunities.

Knowledge = Opportunity

Despite the fact that men and women have the same legal right to participate in politics in the Southern Caucasus does not mean they have the same opportunities for political participation. For example, in Armenia drastically low numbers of women in local government led to the development of a training project for women. By equipping women with information and other skills required to run for political office, this initiative resulted in increasing the number of women running for positions on community councils from 277 in 2002 to 451 in 2005 – a massive increase. While

the number of women elected still remains very low, their numbers nonetheless almost doubled as a result of the training. Creating opportunities and enhancing capabilities through information and knowledge is a key step in enhancing “de facto” equality between men and women.

Value

Thirdly, gender equality also means that men’s and women’s contributions to the family, society, and community should be valued equally, even though those contributions may be different. These contributions include men’s and women’s work (paid and unpaid) and their contributions of non-monetized or immaterial resources such as time, care, skills, and knowledge. Attributing equal value to men’s and women’s resources can sometimes be achieved through law and policy, but it also requires that we shift our attitudes and actions.

Undervaluing ‘women’s work’ has negative consequences for women and men

Most societies do not explicitly value the work that (primarily) women do in the home. This can have significant public policy impact. For example, if pensions are calculated according to income, women are disadvantaged for they do not receive an income for the work they do.

Similarly, if a woman seeks to enter the labour market after staying at home for many years to raise her children, the skills she has acquired from running a household are usually not valued by employers, even though they are often directly relevant to the job market, e.g., financial management and budgeting, time management, interpersonal skills, and multi-tasking. She is considered to have “no job experience” and therefore has great difficulty finding paid employment. To compound this, even if she has a relevant education or previous job experience, she has probably been out of the job market for a considerable time, and therefore these former skills and achievements are un- or under-valued as well. (Moreover, we should note that even when her skills are not relevant to the job at hand, the time that a woman puts into raising her family should be recognized as a subsidy she is giving to society and not only as a professional skill.)

Undervaluing “women’s work” also has negative consequences for men. Men are deterred from taking on “women’s work” – either in the domestic sphere or in professions such as nursing, kindergarten teaching, or as secretaries – because of the stigma and stereotypes attached to this type of work. As a result, men not only suffer because they are denied the emotionally enriching and psychologically rewarding experience of looking after their children – these stereotypes also limit the kind of work they can do. In times of economic crisis and transition, which many countries in the region are still experiencing, this inflexibility of gender roles can drastically limit economic opportunities and innovative strategies for coping with unemployment.

Increasing the value of “women’s work” will primarily require a shift in attitude.

Equally valuing men’s and women’s knowledge has material consequences

When communities are consulted about changes in the heating and electricity systems in their dwellings, women are not always encouraged to contribute. However, women have specific knowledge and experience about how energy gets used in the home (at what time of day and for which purposes, and at what cost to women who must ensure the energy supply), so their opinions should be a key factor when considering new energy options.

For example, an international project in rural Karakalpakstan introduced sustainable energy systems intended to supply households with clean energy for lighting, radios, and television. However, wom-

en were not consulted. The failure to talk to women meant that the real energy needs of households were not prioritized. For example, the provision of extra trucks to carry firewood would have greatly reduced the drudgery of women who were primarily responsible for its collection. This choice would have been particularly important for the poorest women in the village who had to carry the firewood on their backs because they had neither a donkey nor could afford to hire a truck.

This example highlights how important it is that women's knowledge is given the same *value* as men's.

Situation and Outcome

Some critics of gender equality initiatives have pointed out that striving for equality of situation or outcome means that we are limiting men's and women's choices. Their argument states that even if men and women have the same rights and opportunities, they may not make the same choices, and therefore it is wrong to expect that the end result for men and women should be the same.

This criticism raises an important point: Part of gender equality should be to increase the choices of men and women, and certainly not to constrain these choices in any way. And, yes, it is true that men and women can and do make different choices. However, what this criticism does not attend to is the way in which individual choices are overwhelmingly determined by the context in which these choices are made. In most cases, men and women cannot make the same choices because of the deeply engrained social, economic, cultural, and legal contexts in which they live and work. For example, in societies where violence against women is implicitly or explicitly tolerated (which is unfortunately still too often the case all around the globe), women are not able to make real choices. The threat of violence will always constrain them.

Currently, freedom to make real choices is limited to a privileged few, and is certainly not the norm. Moreover, because some individuals can make these choices, this does not address the systemic nature of gender disparities that limit choices overall. Until real choices are available to the majority of the population, differences in outcome and situation between men and women need to be interpreted as a signal of unequal opportunities, rights, and value.

Inequality in the situation of men and women is often a "red flag" that inequality of opportunities exist. That is why inequalities in outcome or situation should *always* be investigated further in order to see if any hidden barriers exist that make *real* choices impossible for either men or women.

Barriers to equality of situation are complex and often hidden

Even though both men and women have the same right to get a job in the construction and building industry, men usually outnumber women in this profession. In some cases this difference in situation has arisen because women have chosen not to enter this profession. But is this always a real choice? What barriers exist for those women who wish to get a job in this often well-paid and stable profession? Does the education system encourage women to get training in this area? What attitudes and stereotypes might prevent women from applying for such jobs? This difference in situation in fact points to an inequality of opportunity.

At the same time, it is important to highlight that achieving equality of situation does not mean that women and men are the same, nor that the goal is to make them "identical." (See below for more on this issue.)

Agency

The final but equally important component of gender equality is agency. While the first four components for the most part consider the social, economic, cultural, legal and other contexts in which men and women live, they might leave the impression that gender equality is something that is simply “given” to us by the state or society. Although rights, opportunities, and value might be conferred through institutions and decision makers, we also need to stress that gender equality is something that men and women can claim through their actions and voice.

In summary: “Gender equality” is not a one-dimensional phenomenon. It is rather a complex constellation of rights, opportunities, value, situation, and agency. Each of these aspects is intimately connected to the others.

Does Gender Equality Mean “Same-ness”?

The term “gender equality” is sometimes misleading, because we might think it means that women and men should be “identical.” Of course, men and women are not identical and they never will be (for no two people, not even “identical twins”, are truly identical!). Just as differences in age, culture, religion, race, and experience contribute to the diversity of our societies and communities, differences between men and women are a vital contribution to this diversity. Moreover, just as men differ from women in some ways, there is great diversity among women, and great diversity among men.

Some of these differences between men and women are biological, such as the ability to bear children, but most of these differences concern the social and cultural positions and values we assign to each gender in our society. Some of these differences may be embraced and enjoyed by men and women. However, many of these differences are *not* desirable – neither from the point of view of individuals, nor from a human development perspective. We need to analyze the causes and effects of these differences to see whether they are related to any inequalities in rights, opportunities, value, or outcome.

Equality vs. protectionist approach: women, men, and childbearing

Because men and women have some biological differences, it is sometimes difficult to determine when “special treatment” is a valid public policy measure, and when it only makes inequality worse. For example, because women can become pregnant and bear children, public policy should take this difference into account. Women must be ensured safe and appropriate conditions for pregnancy, childbirth, and infant care, but not at the expense of denying them opportunities to be fully active in the labour force and community, if they so choose.

Inappropriate policy measures

- **Women are banned by legislation from working in certain professions (e.g., heavy industry).**
This is often done because legislators want to “protect” women who might be or become pregnant. This attitude ignores the fact that not all women want to bear children, and suggests that a woman’s only destiny is to be a mother. This attitude might also assume that women are always weaker and less capable than men in certain respects, which is not the case. Such generalizations do not offer all men and women the same opportunities. Moreover, this lack of opportunity often leads to other gender inequalities, as these jobs are often very well paid compared to other work requiring the same level of education. Everyone should be given the opportunity to pursue employment for which they are qualified.
- **Women are banned by legislation from working in certain environments (e.g., where exposure to chemicals is likely, or other high-risk situations exist) or at certain times (e.g., at night).**
Again, legislators may want to “protect” potential mothers from exposure to harm. This limits women’s opportunities and can increase economic inequalities between men and women. Moreover, if a job presents risks to women, it probably presents risks to all employees. All jobs should be safe for all employees – male or female.
- **Parental leave is given solely to women.**
Sometimes we incorrectly assume that during the first months or years of a child’s life, the father does not have an important role to play. For this reason paternity leave might not be offered as an option, or it might be actively discouraged by employers and colleagues. This limits the opportunities and resources available to men to participate in caring for their young children and creates obstacles to come to terms with the gender division of labour, which has long-term consequences for equality in the labour market.

Appropriate policy measures

- **Labour and education policies should ensure that both men and women have equal opportunity to pursue the career of their choice.**

All employment should be open to both men and women. Both men and women should have equal opportunity to pursue careers of their choice, and be equally encouraged to do so through education, training, and incentives programmes. While it is not necessary that all professions be equally made up of men and women, research has shown that restricting jobs to only women or men can have negative effects on the overall economy.

- **Dangerous work situations are properly regulated to ensure the health and safety of all employees.**

If a job is too dangerous for women who may become pregnant, then it is likely too dangerous for everyone. No one should be unnecessarily exposed to dangerous chemicals or asked to work in a situation that may jeopardize their health and safety. Moreover, men's reproductive ability can also be negatively affected by occupational hazards.

- **Policies are put in place to allow pregnant women to temporarily modify the demands of her profession, if her health or the health of her baby is at risk.**

Because pregnancy can be particularly stressful on some women's bodies, there should be the possibility to reduce the amount of physical stress normally demanded by her job, such as long hours spent standing or heavy lifting. If deemed necessary by a doctor, paid leave should be granted during her pregnancy. Such provisions should not negatively influence her job status, benefits, or seniority in any way.

- **Both men and women have the option to take parental leave to care for children.**

Men should be given the opportunity to bond with their young children, and couples should be given the option to decide for themselves which parent will stay at home to be a primary caregiver to the child. Adequate leave provisions should also be made for those who are self-employed or work only part-time.

- **Employers accommodate the needs of both men and women with young children to balance their work and family life.**

Employers should allow new parents the option of part-time work or "job-sharing," work-from-home options or other flexibility measures to allow them time to raise their families as well. Places of employment should provide an appropriate space for mothers to nurse young children. The provision of on-site crèche facilities can greatly relieve the stress of new parents returning to work, and thus also enhances employee productivity and reduces turnover.

In summary: Women and men are not the same, and the improvement of gender equality does not strive to make men and women into identical beings. Diversity plays a vital role in our societies, and this includes the diversity of men and women. At the same time, while some differences should be celebrated, inequality (of rights, opportunities, value, and outcome) must be addressed and overcome.

Is Gender Equality Only a Women's Issue?

Obviously, gender equality is a women's issue because it affects women, and women most often suffer disproportionately from gender inequality. However, gender equality is not *only* a women's issue. If only women are involved in discussing and addressing gender inequality, the solutions will not work. This is both because women represent only a partial perspective of society, and because most often women are not in the decision-making positions necessary to implement the solutions. Men and women have to be equal stakeholders and equally committed to solutions in order for them to be accepted, both formally and in practice.

BOX: Work/life balance is a women's issue

The need to balance work and family life is an issue that relates to gender equality. Because women in many societies are expected to look after the children, this balancing act is particularly difficult for them—especially when, as is often the case, they are also expected to contribute to the household income. This is why gender equality is definitely a women's issue.

Moreover, while some problems and challenges are more pressing for women than others (e.g., receiving equal pay for equal work, or domestic violence), men also face specific problems and challenges that require special attention (e.g., high rates of unnatural causes of death such as suicide, occupational accidents, traffic fatalities).

BOX: Work/life balance is a men's issue too!

Work/family life balance is also very relevant for men, who are expected to earn a living for their family in most societies. As increasing numbers of men recognize the benefits of participating in childrearing and family life, this balancing act becomes an important issue for them as well.

Inequalities in education: Unequal for whom?

Central and Eastern European countries have often been used as examples of high gender equality in education. In fact, in many countries in this region women are better educated than men. For example, recent data from Latvia show that the number of women attending university is 1.7 times greater than the number of men. In these cases, we need to investigate why fewer men are achieving a post-secondary education and what the consequences will be for men and society more broadly.

However, this is not the case all over the region. In a striking example of women's inequality, recent data from Tajikistan show that the percentage of girls in secondary education has dropped to 39 percent, whereas at the beginning of the transition period girls outnumbered boys 104 to 100. In 1998, only 26.6 percent of students enrolled in universities and other post-secondary institutes were women. This data is extremely worrisome.

The differences between these two countries clearly demonstrate that inequalities can apply to both men and women, and that these differences need to be addressed in both cases. But it is also important to note that the root causes and the end consequences of these disparities in education are likely to be very different. For example, while the higher level of education of men in Tajikistan translates into better economic opportunities for men in that country, in countries where women outnumber men in university, men are still enjoying an advantage over women when it comes to

income. In fact, in Latvia, despite their high level of education, the situation of women in the job market is now showing signs of worsening when compared to that of men.

Gender inequality affects both men and women directly; and, in turn, families, communities, and entire nations are adversely affected by these inequalities.

In summary: Gender equality is relevant for both men and women. Both suffer directly and indirectly from inequalities.

Haven't we Already Achieved Gender Equality? Aren't there Other Issues More Important Now?

It is true that over the past decades many important gains have been made in the name of global gender equality. These include formal gains (such as amendments to many national constitutions to prohibit discrimination on the basis of gender, and the adoption of equal opportunity policies and legislation in countries across the globe) as well as real changes in the lives of men and women (for example, women around the world today make up a much larger percentage of the labour force than they did several decades ago). Despite this progress, however, gender inequality remains a common denominator across all nations on the globe.

NOTE: No nation in the world enjoys equality between men and women in all spheres of life.

More importantly, many of the advances in global gender equality are not reflected by the reality in Central and Eastern Europe, the Caucasus, the Balkans, and Central Asia. In the context of the social, economic, and cultural upheaval that began with the transition to market economies and continues in the era of globalization, many countries in this region are seeing the rise of extremely worrisome trends in relation to gender equality.

BOX: A cause for concern

Despite some key advancement in gender equality in Central and Eastern Europe, there is a great cause for concern:

- In some Central European countries, national governmental institutions for the promotion of gender equality have been dismantled or have had their funding drastically reduced.
- The education of girls in Tajikistan is falling at a startling rate at all levels of education.
- Trade liberalization in Georgia has resulted in a disproportionately high number of women losing their source of livelihood.
- Some 70 percent of recent complaints received by the Labour Inspection Department in Moldova are from women, citing gender discrimination in job hiring practices.
- In only 5 out of 29 countries in the region do women make up more than 20 percent of parliamentarians. In 9 of these countries women account for less than 10 percent of parliamentarians. While some countries saw an increase in political participation in the 1990s, this increase has now stagnated, or in some cases even reversed.
- Between 2003 and 2005 there was a nearly 30 percent increase in the number of women living with HIV in the region, although the total number of new HIV infections in men, women, and children combined remained the same.
- The incidences of gender-based violence and of trafficking in women have reached alarming rates.

We need to build on our accomplishments, but this is no time for complacency towards gender equality. These negative trends will have devastating consequences for all of society.

As mentioned earlier, individuals experience discrimination and inequality due to many factors besides gender. These include low economic status, race or ethnicity, religious affiliation, age, physical or mental disability, and sexuality. Situational factors such as systemic poverty, environmental degradation, or rural neglect can also lead to serious hardship and inequality.

At the same time, it must be highlighted that **gender inequality is often an additional dimension of discrimination within disadvantaged groups**. So, for example, while an ethnic minority or a low socio-economic class may face a particular hardship in some situations, the women within these groups are often even more disadvantaged.

BOX: Nowhere in the world are men and women fully equal

Sweden is commonly cited as a country that enjoys a high level of gender equality and, indeed, it has made great progress in this field. For example, directly elected political assemblies enjoy an approximately equal representation of men and women. In 2004 the Swedish parliament was made up of 55 percent men and 45 percent women.

However, upon closer inspection we discover that the situation is not nearly as equal as it first appears. In March 2004 the Swedish daily paper *Svenska Dagbladet* conducted a survey exploring gender equality in the Swedish parliament (Riksdag), asking 155 out of the 158 members of the Riksdag how they experienced gender equality at their workplace. The result was striking: 6 out of 10 female parliamentarians indicated that they had been subject to sexual discrimination during their work at the Riksdag. The female parliamentarians had experienced everything from derogatory or chauvinistic remarks about their appearance from male colleagues to being disregarded in political debates. Still others reported being excluded from important decision-making due to the fact that these were made by male colleagues outside the workplace.

Despite great progress, we still have a way to go before men and women enjoy true equality – even in the world's most equal countries.

Some women are more “equal” than others

Every country in the region can point to some very successful women who have been able to take advantage of the changes offered by the social and economic transformations in their countries. In most cases these are highly qualified, ambitious young women who work in high positions in multinational companies, do white-collar work in foreign countries, and have managed to procure a securely high standard of living in a capitalist, transnational environment. In other cases, women have attained extremely powerful positions in public office. It must be remembered, however, that these women represent an extremely small percentage of women in the region.

At the same time, other groups of women have obviously suffered from the consequences of social and economic restructuring. One such example is the Roma minority in a number of east-central and southeast European countries. The position of minority women has not been extensively explored by experts in the region, even though their social situation is often appallingly difficult, and their rates of poverty and unemployment significantly higher than that of the majority.

In summary: Full gender equality has not yet been achieved in any country in the world. In some areas within this region, gender equality is even getting worse. Moreover, other forms of discrimination and inequality often overlap with gender inequality to create an even greater disadvantage.

What Causes Gender Inequality?

There is no one cause of gender inequality that can be isolated. Rather, gender inequality works like a spiral whereby inequality in one place gives momentum to inequalities in other places. These instances of inequality overlap and reinforce each other, creating a tangled web that is difficult to unravel. Existing inequalities, if unchecked, lead to further inequalities. This is why addressing gender inequality is very challenging, and why it requires a multi-pronged approach. Moreover, because inequalities have existed for a very long time, the weight of history makes change even more difficult.

It is clear, however, that our norms, values, and attitudes play a key role in perpetuating gender inequalities. Long-standing cultural values influence us all and affect our actions – sometimes without us even noticing. Unfortunately, in many cases these values include the belief that women are inferior or weaker than men, that women are poor decision makers, that men have no role or skills for raising children, and so on. Practical experience has proven all of these assumptions to be false. Still, we often uncritically follow the conventions that stem from these assumptions, because “this is how things have always been done” (even though history shows us that gender roles and conventions have indeed changed a great deal through the ages). As a result we sometimes end up perpetuating discrimination or gender stereotypes, even if we consider ourselves to be fair and just people.

BOX: Checking Our Assumptions

When the Minister of Trade arrived at the international meeting with her assistant, she was frustrated by the fact that many people kept addressing her assistant as though he were the Minister, and assuming that she was his assistant! Why do we make these assumptions? Are they based on the actual abilities of men and women? Or are they based on stereotypes and historical gender roles? How do these assumptions serve as barriers to those men and women who try to move beyond traditional gender roles?

Norms and values about gender roles are very deeply rooted and we cannot expect to change these overnight. At the same time, not all of our values are negative! We must begin by taking note of the norms and assumptions that lay the groundwork for our gender roles, and then critically assess them to determine which values foster a positive culture of diversity, and which ones are actually barriers to achieving gender equality.

Values and Assumptions that Promote Inequality	Values and Assumptions that Promote Diversity
Women and men are naturally different and we shouldn't tamper with nature.	Women and men have differences, but most of these arise from their different life experiences.
Men are good at “men's work”; women are good at “women's work”.	Not all women or men are good at everything, but each woman and man should have the opportunity to discover and pursue his or her own talents and ambitions.
Only women should (or can) care for young children.	Children should benefit from close interaction with and care from both women and men from a very young age.
Women are poor decision makers.	Because men and women often have different life experiences, they may make different decisions and use different decision-making processes. This plurality of voices can enrich any decision-making body.

Law and public policy might also support gender inequality. These formal structures are a mirror for society's values; if gender inequality is part of a society's deep-rooted value system, then laws and policies will reflect this. Rather than protecting and promoting justice and welfare for all, these systems can actually cause and increase inequality between men and women.

For example, until recently women in Tajikistan did not share the same legal right to land ownership and use as men. Amendments to the law on land ownership were introduced in 2004. Now women can receive a Land Use Certificate (previously limited only to men), and women on maternity leave are no longer legally discriminated against in the land distribution process. These examples show that we need to be critical about our existing laws: Just because it is "the law" does not mean it is right. Laws reflect our values, and we need to update our laws to reflect our improved understanding of gender equality. It is, however, important to keep in mind the difference between *de jure* and *de facto* equality as explained at the beginning of this chapter.

Similarly, institutional practices, such as education, political culture, business culture, and community leadership, also mirror norms and values of the societies in which they operate. So, again, instead of providing structures that all members of society can equally participate in and benefit from, these practices might in fact present very different opportunities and benefits to men and women.

BOX: Consulting Women Needs To Become Standard Practice

In a recent project intended to increase access to clean water in a rural community of Kazakhstan, women were not consulted about the project and were not involved in its implementation. As a result, women did not benefit from any personal opportunities that could have arisen through project involvement (skills building, employment opportunities). Moreover, if women had been consulted, a range of alternative strategies with better results could have been considered. The fact that women would be more affected by access to clean water (related to the incidence of anaemia in women and their increased nutritional needs during pregnancy) only serves to underline the priority that their involvement should have received.

The exclusion of women from this project is just one example of the entrenched gender biases of many institutional practices. Even though the project's aim was to improve the lives of "all villagers," its failure to involve and consult women resulted in a project that was less effective overall.

Ultimately, norms, values, and attitudes combine with laws, policies, and practices to produce a **gender-based power structure** in virtually all societies. This power structure generally permeates public and private institutions and the home, and has four main characteristics:

- The separation of people into two categories: male and female
- General privileging of the male side of this separation
- A view of the male side of this separation as the "norm"
- The gendered division of resources (money, time, skills, other)

Again, it is important to note that the differences between men and women are not in themselves problematic. Problems arise when the two sides of this separation come to be valued hierarchically, and the male side comes to be seen as representative of "humans" or "the population" in general.

BOX: Which Gender is the “Norm”?

When we make generalizations about “people,” “populations,” and “humans,” whom are we including and whom are we excluding? Most often, men are seen as the “norm” and the “standard bearers” for the population in general, and the way in which women may be different or may fall outside of the scope of these generalizations is often unaccounted for.

For example, when clinical trials of new medicines are conducted using only male participants, medical researchers can not consider the benefits and harms of these drugs to women. Men should not be assumed to be the “standard patient” because men and women display important physiological differences. This is an example of an institutional practice that results in unequal benefits for men and women (and can in fact be life-threatening to women).

We can also look at the example of international human rights law. Despite the fact that international covenants on civil, political, economic, and social rights were adopted in 1966, 13 years later the international community still saw the necessity of adopting The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW). Obviously, the guarantee of rights for the “general population” as stipulated in the earlier covenants did not, in practice, include the full guarantee of rights for women. This example again shows how men often serve as the “norm” in our societies, and how women, if they are considered at all, need to be specifically addressed as an exception.

We need to move towards the inclusion of all people (of both sexes and all classes, ethnicities, and ages) when we make generalizations about “people” and “populations.” But until this becomes the normal practice, we need to continue ensuring that all people’s situations are accounted for through specific measures such as CEDAW.

Additional problems arise when resources are unequally divided between men and women. As we see in virtually all societies, this leads to such results as the division of the labour market into “jobs for men” and “jobs for women,” a significant gap between what men earn on average and what women earn, a general disregard of women’s experiences and opinions in many areas that concern society as a whole, and violence against women, to name but a few.

It is important to note that this gender-based power structure describes structural differences in society – in other words, general trends that shape attitudes, institutions, and social, cultural, and economic practices. Even if we oppose gender inequality on an individual level, this age-old power structure probably still seeps into our interactions with other men and women at an unconscious level. Changing this structure will take changes not only in attitudes and individual behaviour, but targeted changes to the systems and institutions that shape our societies.

In summary: Norms, values and attitudes, laws and policies, and our institutional practices all reinforce one another in a manner that creates and sustains gender inequality. Because this results in a gender-based power structure, gender inequality continues to flourish even if we, as individuals, oppose it in theory.

What are the Costs of Gender Inequality?

Gender inequality is not only disadvantageous to those directly affected by discrimination. It affects individuals, families, and the human development of the nation as a whole. Moreover, as noted above, inequality breeds inequality: That is, gender discrimination has a domino-like effect which creates ripples of inequalities and problems throughout society.

Gender inequality can have devastating consequences for individuals directly affected by it. Both men and women can be barred from earning a living because of it, or suffer the material and psychological effects of harassment, discrimination, and exclusion. In its most severe instances, gender discrimination can kill: Domestic violence is a common example of this. In countries across the world, the most common cause of unnatural death for women is murder at the hands of her partner. Gender discrimination also kills in indirect ways. For example, pressures associated with traditional gender roles have led to shocking suicide rates among young males in many countries.

These individual costs obviously result in a variety of costs for society as well. Still, if our societies are truly committed to human rights and democracy, the violation of even one person’s rights and the unjust treatment of any individual should be cause for our concern.

BOX: Stereotypes hurt Men, Too

Ivan, 47, lost his job as a bookkeeper when the company he worked for went bankrupt. The province in which he lived was experiencing serious economic decline, and businesses that did not go bankrupt were moving elsewhere. However, he noticed that the District Councillor had advertised a job for a secretary, so Ivan applied. Although Ivan had all of the qualifications, he was told that he was not an appropriate candidate for the job. The job was given to a 22-year-old woman with very little experience. Because of pervasive norms and stereotypes, the District Councillor thought that a man in the job of secretary was “unnatural,” even though Ivan was far better qualified.

Equally important, gender inequality limits potential and innovation in a way that disadvantages the development of the entire nation. If we become stuck in traditional gender roles and tied to outdated notions about men’s and women’s position and value, we close ourselves off to possible solutions to challenges our societies might face. We fail to utilize our maximum creative and productive energies, and this has both economic and social consequences to our societies.

Higher equality = More opportunities for growth

Recent research from countries across the globe has shown that the gender bias in education and employment appears to have a significant impact on economic growth.

The costs of gender equality relating to different thematic areas are examined in more detail in the CD of this Toolkit.

In summary: Gender equality has social, psychological, and economic consequences for individuals, institutions, and society as a whole. While direct costs are more obvious, the indirect costs to families and communities are far-reaching as well. How many more ideas and opportunities would be generated in a more equal society, and how many resources, livelihoods, and lives would be saved?

Does the absence of Direct Discrimination Against Women Mean that Equality Has Been Achieved?

Some of us think that if law and policy do not directly discriminate against women or men, we have done everything necessary to encourage gender equality. For example, some countries have reviewed all of their legislation and found that no laws specifically limit the opportunities for men or women and therefore assume that gender equality does not have to be considered any further.

The problem with this approach is that it does not take into account the many ways that policies or laws might indirectly limit the opportunities of men or women. Often, policies that maintain the status quo in regards to gender relations are indirectly responsible for encouraging gender inequality. Programmes and policies need to consider gender roles and relations in the larger context of the intervention.

BOX: Hidden obstacles to Participation in Economic Life

A small business loans program may not directly refuse loans to women. However, what if women are too busy with domestic responsibilities to participate, or cannot go to the loans office during the hours it is open? What if loans require a certain amount of personal co-financing that women do not have access to? What if the loans officer doesn't personally think that women should be running businesses? If women are shut out from receiving loans for these or other reasons, then such a programme might actually increase socio-economic inequalities between men and women.

Similarly, even if there is no direct discrimination against men or women in law or policy, this does not address the fact that there is also a need for specific laws and policies that pro-actively strive to make the opportunities for men and women in society more equal. "Gender neutral" policies often ignore the specific needs of both men and women.

Examples of laws and policies that can pro-actively enhance gender equality

- anti-discrimination laws
- reproductive and sexual health policies and laws
- policies and laws combating domestic violence and trafficking
- electoral reform laws and policies that enhance gender balance in the political arena
- parental leave provisions for both men and women
- gender-sensitive approaches in education and school curricula
- gender-sensitive taxation policies

Again, differences in the situation of men and women should alert us to the fact that law and policy are not adequately addressing gender inequalities. These laws and policies need to be strengthened and complemented by other strategies. In other words, as long as significant differences persist between men and women in terms of income, education levels, health and welfare indicators, and participation in top decision-making positions, we have to assume that full gender equality has not been achieved. The fact is that no country in the world has achieved gender equal outcomes in all of these areas. Therefore, gender issues need to stay on the agenda.

In summary: In our societies, the vast majority of gender inequality is hidden and indirect. Too often, laws and policies simply maintain the "status quo" of gender relations. True gender equality will only be achieved when indirect discrimination against men and women is fully acknowledged and actively addressed.

What About Affirmative Action?

Affirmative action is a measure taken when either men or women (or any other underrepresented group) are granted specific assistance in order to try to correct massive inequalities. Such measures might include reserving a number of spaces for women in certain school programmes, decision-making bodies, or other institutions, or giving preference to women in hiring practices, as long as the female candidates possess all other specified qualifications.

This may seem to be inconsistent with the principles of gender equality, as such direct action involves enhancing opportunities for one specific group, but not for others. It must be remembered, though, that affirmative action measures are only taken in order to correct inequalities that already exist. Often, gender imbalance in institutions or certain jobs is the result of prejudices, stereotypes, and accepted practices that have been around for generations. These attitudes may be so entrenched that they are almost invisible, and it is difficult to remove them. Affirmative action measures can help us break bad habits and get out of the rut of discriminatory attitudes. Once a general balance is achieved, such measures would no longer be needed.

BOX: “Women (or Men) Are Encouraged To Apply”

Some job advertisements specify that female candidates are particularly encouraged to apply. This is to try to achieve more gender balance in workplaces where men are currently in disproportionate numbers. Such advertisements also help break down stereotypes and signal to potential employees that women are welcome in traditionally male-dominated spheres.

While it is less common, similar measures should be taken to encourage men to apply for work in traditionally female-dominated spheres.

In summary: Affirmative action is sometimes needed to correct inequalities that are very deeply entrenched in a system. It does not punish the majority group, but rather gives all groups an equal chance.

How Can Gender Equality Be Achieved?

Because the causes of gender equality are deep-rooted and complex, we should not assume that achieving full equality between men and women is a short-term or even medium-term goal. This is a long-term process that should be judged according to the progress it continues to make. Progress will require addressing all of the factors that contribute to inequalities.

Rebuilding our norms, values, and attitudes: Increased awareness and education about the costs of gender equality and the hidden ways that it adversely affects everyone in society will gradually lead to a shift in norms and values. Even if we believe in human rights, justice, and equality, we still need to confront the indirect ways that inequalities are perpetuated if we wish to create a truly equal situation for men and women.

Reviewing and amending laws and policies: Formal guarantees are a crucial part of creating a context in which equality can flourish. While laws and policies themselves can not force people or institutions to change their practices or attitudes, they can create incentives for positive change (and consequences for those who do not comply with the law). They also send a message about the values of the government and nation as a whole. In this way they set standards and positive examples.

Transforming our institutions and institutional practices: Because the gender-based power structure creates a system that guides and shapes our behaviour and choices (sometimes without us realizing it), we cannot rely on our individual best intentions alone to change this power structure for the benefit of both men and women. We need to make formal changes to our institutions and systems. This includes everything from hiring practices and educational curricula to decision-making processes at the community level. It includes moving away from using men as a “norm” and officially making room in our systems for the different contributions and experiences of both men and women. If we change the structures and the systems, it will be easier for us to get rid of hidden discrimination and barriers.

Breaking down the gendered/sexual division of labour: One of the key factors to creating a more equal society entails moving away from our current attitudes and practices that delimit “women’s work” and “men’s work”. This key change will necessarily involve all of the above changes: We will need to change our attitudes about what is appropriate for men and for women to do, we will need to increase the value that our societies place on so-called women’s work, we will need to make legislative and policy changes that encourage the breakdown of this division, and we will have to change our institutional practices accordingly as well.

The results of dismantling this division will be far-reaching: Both men and women will experience economic, social, and personal benefit from an enhanced (real) choice about what sort of work they do and how they spend their time. Only once the gender division of labour becomes less rigid will we be able to see substantial and sustainable progress towards gender equality.

In addition, achieving gender equality can be assisted by **establishing ways to track and measure progress** towards these goals. While these indicators and goals in themselves do not improve opportunities for men and women, they are a good way to encourage progress: They show us what we have achieved and what we still have to achieve.

BOX: The Convention on the Elimination of All Forms of Discrimination Against Women (1979)

This United Nations convention, also known as CEDAW, is an important guide for enhancing equality between men and women, laying out the various areas in which governments are obliged to take action. Importantly, these obligations are not limited to achieving “de jure” equality between men and women. In fact, by joining CEDAW governments agree to take action:

- to eliminate gender prejudices
- to eliminate any (public or private) behaviour that is based on the inferiority of women and superiority of men
- to eliminate practices that are based on stereotyped roles for men and women
- to ensure that both men’s and women’s roles in bringing up children are recognized (CEDAW, Article 5)

In short, by joining CEDAW our governments have made a commitment to go to the very heart of the gender-based power structure and eliminate the root causes that make gender inequalities seem “normal” in our society.

In summary: Improving gender equality requires a multi-pronged approach. Without changes on both the institutional and individual levels, it can not be achieved.

Conclusion

Gender inequality is a complex phenomenon. The implications and consequences of gender inequality touch every sphere of our lives, whether we are men or women, children or adults. Many of us are so accustomed to it that we have come to accept it as “normal.” This is why it will take more than changes to our laws and policies to achieve true gender equality – although legislative change is important, too. Understanding the complex and indirect ways that gender inequality manifests itself and recognizing its wide-reaching consequences are the first steps to moving towards a more equal society.

How many more ideas and opportunities would be generated in a more equal society? How many resources, livelihoods, and lives would be saved?

Gender Analysis: a Guide

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Introduction

Without a doubt, the most important factor for successful gender mainstreaming is reliable information and analysis. This information and analysis has many forms; some is readily available (if we know how to ask the right questions) and some requires various levels of research. Together, this spectrum of information and analysis is known as gender analysis. Without it, gender mainstreaming is not possible.

This booklet is meant to facilitate the process of gathering and using gender analysis as part of the gender mainstreaming process. It is organized into four sections:

I. What is Gender Analysis?

The purpose of this section is to clarify what gender analysis is, and to elaborate its aims and objectives. It provides a detailed explanation of the necessary components of any level of gender analysis, and outlines the theoretical necessity for conducting gender analysis.

II. Planning for Gender Analysis

This section is intended to help you plan for undertaking gender analysis and research. If you do not have the necessary skills or resources to conduct gender analysis yourself, this section serves as a practical guide for ensuring that any research you commission gives you the results you want and need.

III. Gender Impact Assessment

Gender impact assessment (GIA) is one specific form of gender analysis. This section introduces you to the methodology of this analytical tool, and also provides a number of case studies to show how this tool can be applied in a variety of circumstances.

IV. Summary and Conclusions

As the title suggests, this final section highlights the main conclusions to be drawn from the information contained in the three primary sections.

Together, these four sections will help you ensure that gender analysis is effectively used as an integral part of your gender mainstreaming activities.

What is Gender Analysis?

Objectives and goals

Gender analysis is the starting point for addressing the gender dimensions of any given issue or intervention to mainstream gender.

Gender analysis is defined in different ways in different contexts. At its most basic level, it interprets data and information about a given or potential situation from a gender perspective.

Gender analysis therefore pays specific attention to differences in the gender roles, activities, needs, and available opportunities of men and women.

The **objective** of gender analysis is to clearly identify these often overlooked differences.

Analysis occurs at many different levels. It can be a review that you perform at your desk when planning a project, or it can be an in-depth research project that you contract out to experts.

Yet at every level, gender analysis has a common **goal**: *to provide quantitative and qualitative information and data that can enable informed decision-making for the benefit of both men and women.*

Gender analysis is sometimes also referred to as:

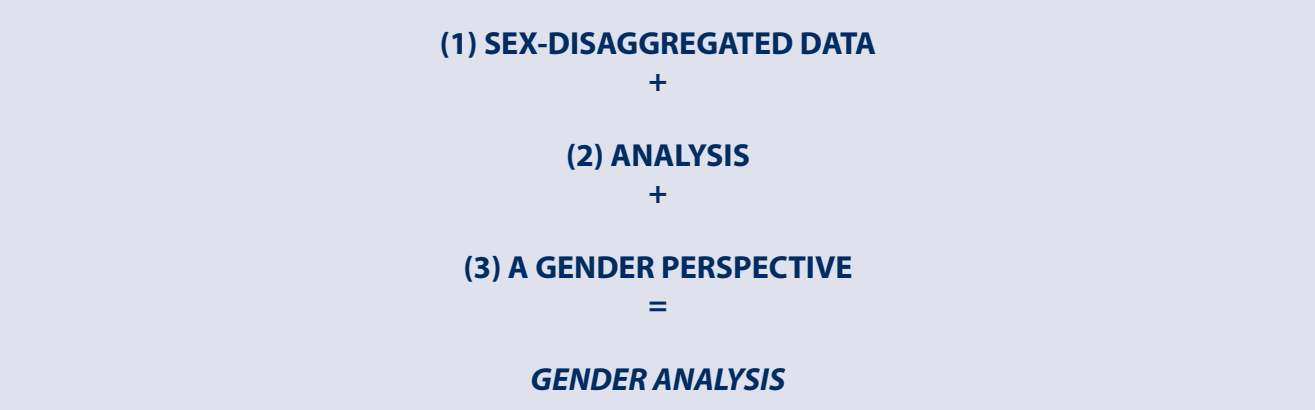
- **Gender-sensitive analysis:** This term reminds us that we need to be *sensitive* to gender-related differences that are not always obvious. We need to look for specific information in order to make these real and potential differences visible to policy makers.
- **Gender-based analysis:** This term 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 or objective 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.

NOTE: No matter what we call it, gender analysis always interprets information from a gender perspective in order to highlight similarities and differences between men and women. It subsequently uses this analysis to make better decisions about policies and projects. It thus provides the information base necessary for successful gender mainstreaming.

Basic components of Gender Analysis

Any type of gender analysis consists of three necessary components, described in more detail below:



1. Sex-Disaggregated Data

This refers to data (statistics, interview results, and other basic information) that clearly distinguishes between data applicable to women and data applicable to men. Consider the following difference between data that are not disaggregated by sex and data that are:

Data that are not disaggregated by sex	Sex-disaggregated data
156 residents of an apartment block complex attended a meeting on new waste and water management systems for their community. A total of 750 adults live in this complex.	156 residents of an apartment block complex attended a meeting on new waste and water management systems for their community. 133 were men and 23 were women. A total of 750 adults live in this complex, with an approximately even split between men and women.

2. Analysis

Analysis refers to interpretation of that data by asking, “What does this information mean?” For example, the following provides a basic interpretation of the above data:

Analysis
Approximately one in five residents attended the meeting, which is viewed as reasonably good participation. Nearly six times as many men attended as did women.

3. Gender Perspective

While the above analysis notes the difference between men and women, it does not analyze the causes or consequences of this difference. Adding **a gender perspective** means that the interpretation of the data will occur according to established sociological (or other) theories about relations between men and women. Providing this perspective is crucial so that the analysis can be used for better policy formulation and decision-making. Consider the difference between the following two possible interpretations of the above data:

Analysis of gender differences that does not consider established theories about gender relations	Analysis that includes a gender perspective, based on established gender theories
<p>Women were in low attendance at the meeting because:</p> <ul style="list-style-type: none"> • Women are not interested in waste and water management. • Women have no knowledge about waste and water management. • Men are better decision makers and leaders than women on issues of waste and water management. <p>Women's low participation in the meeting will not have any negative consequences, since they will benefit from the new solutions anyways.</p>	<p>Because women are primarily responsible for tasks involving waste and water management, their low attendance must be due to other factors:</p> <ul style="list-style-type: none"> • Was the meeting at a time when women could attend? • Were women informed about the meeting? • Are women systemically shut out of community decision-making processes? <p>Because women are the primary managers of waste and water in the home, their low participation at the meeting is likely to result in less effective and sustainable solutions.</p>

NOTE: Gender analysis requires these three components (sex-disaggregated data, analysis, and a gender perspective) in order to provide a reliable information base for gender mainstreaming.

Basic Gender Theories

As mentioned above, the third component of any type of gender analysis is the inclusion of a gender perspective in the interpretation of data. This means that analysis must be specifically informed by accepted theories about gender roles, relations, and equality. In other words, the analysis should draw on demonstrated sociological research findings about the roots of inequalities between men and women and how these 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:

- Our societies are shaped by a **gender-based power structure**, which divides the population into men and women, and values their contributions unequally. This power structure is so long-standing and pervasive that many of us have come to see it as “normal” and “natural” – although it is not.
- The **gender-based power structure is systemic** – which means that this power structure shapes the institutions and systems in which we participate, even if as individuals we support gender equality.
- Because gender is largely a **cultural and social construct**, gender roles and relations can and do change over time.
- The **gendered division of labour** (i.e., the fact that most paid and unpaid work is generally divided between “men’s work” and “women’s work”) is the starting point for many gender imbalances and inequalities in society. Because men and women frequently occupy/work in different spaces, their needs, priorities, experiences, and perspectives are influenced by the lived realities that more often than not limit women’s choices and opportunities.
- **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 not only material resources but also time, knowledge, and information. Because of their multiple roles in the home and community, women are often “time-poor” – but for the same reasons they are rich with knowledge and experience that is not always valued.
- **De jure** (legal) gender equality does not always translate into **de facto** (practical) gender equality.
- **Culture, attitudes, and stereotypes** profoundly influence access to and control over resources, and thus the realization of de facto gender equality.

How familiar do I need to be with gender theories?

All project/policy planners should understand these basic gender theories. A general understanding of these theories will allow you to:

- Understand how and why policies and projects might affect men and women differently
- Formulate key research questions about (potential or real) gender impact
- Competently evaluate research proposals and research results

Gender analysis takes baseline theories such as these as its starting point.

Asking ‘Gender Questions’

One way to approach the analysis of data and information from a gender perspective is by asking “gender questions.” This means using your understanding of basic gender theories to ask about the differences between men and women revealed by your data. Basic gender theory can suggest possible explanations for these differences. By formulating these suggestions into relevant questions, you can provide a framework for the direction in which your gender analysis needs to move. The next step in gender analysis is to follow up on these questions by testing them using sound research methodology.

Traditional analysis often overlooks gender inequalities and gender-based impact because these phenomena are often not obvious at first glance (or we are so used to them that we no longer notice them). A gender question, therefore, must look below the surface of our assumptions and “standard” perceptions. Gender questions ask, for example:

- What are the potential gender inequalities that are hidden below the surface?
- What might be the complex reasons for gender disparities?
- What might be the complex effects of gender disparities?

In other words, gender questions are questions that use basic gender theories to reach reasonable hypotheses about the nature, causes, and consequences of gender disparities. These questions can then be made much more specific, depending on the given situation. Consider the following two examples:

Existing Information	Relevant Gender Theory	Specific “Gender Questions”
Example 1: Men and women have equal access to free internet resources in the community. However, these services are used mostly by males.	<p>Resources include material resources, but also time, knowledge, and information. Because of their multiple roles in the home and community, women are often “time-poor” – but for the same reasons they are rich in knowledge and experience that are not always valued.</p> <p>Culture, attitudes, and stereotypes profoundly influence access to and control over resources.</p>	<p>What does “equal access” mean? For instance:</p> <ul style="list-style-type: none"> • Do women and men have the same internet skills, or the same opportunities to gain these skills? • Are internet resources available at times convenient for women? • Has information about these services been made equally available to men and women? • What cultural norms and attitudes exist that might act as a barrier to women who otherwise might use these services?
Example 2: 80% of men and women report that they believe in gender equality.	The gender-based power structure is systemic – which means that it shapes the institutions and systems in which we participate, even if as individuals we support gender equality.	<ul style="list-style-type: none"> • Does the actual behaviour of men and women correspond to their commitment to gender equality? • What actions do individuals take to oppose the entrenched inequalities in their systems and institutions?

NOTE: In both examples, well-formulated gender questions, based on relevant gender theory, can help dig below the surface of data and information to reveal the hidden or overlooked aspects of gender inequalities. These questions then point the way in which research should move, and thus begin to determine the nature of the policies to be formulated.

Drawing Conclusions

While asking effective gender questions helps point gender analysis in the right direction, good gender analysis should also seek to provide answers to these questions. One common problem with gender research is that it often describes the situation and notes differences between men and women, but fails to address the root causes that perpetuate gender inequality and discrimination. It should also be asking: Why does this difference between men and women exist? What is significant about this difference? The following two principles should be used as guidelines to ensure that gender analysis also *draws relevant conclusions* that can inform further action.

1. The “What-Why?” principle of gender analysis

Analysts should point out **what** the difference between women and men is, but more importantly **why** the difference exists. Good gender analysis should *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. Policies need to be based on facts, not assumptions!

If causes are unknown, further research needs to be undertaken. However, if you take basic gender theories into account, your conclusions might suggest a hypothesis. 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 that 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

Describing or noting gender disparities should be accompanied by an analysis of their impact on human development. Otherwise, policy makers might say: “Yes, there is a difference, but so what?” Unfortunately some policy makers (mistakenly) believe that such inequalities are only a reflection of “natural” gender differences, and that the effects of these inequalities are benign or even positive. Gender analysis needs to underline the impact of these inequalities on overall human development, so that appropriate policy interventions can be formulated.

EXAMPLE: If your research reveals that women have not been included in discussions about a local water basin clean-up project, what impact will this have not only on women who have been excluded, but on the overall development situation? Not only are women’s rights to participation limited here, but this exclusion will negatively affect the outcome of the project. Because women’s roles in the household and community give them unique insights, knowledge, and skills about water use and environmental protection, failure to include this perspective will result in less effective and less sustainable solutions. Good gender analysis should specify and, where possible, quantify these costs.

NOTE: Describing the situation of men and women needs to be accompanied by substantiated conclusions. Only then will gender analysis be of maximum benefit to both the male and female target beneficiaries of policies and projects.

Summary

- Gender analysis provides the necessary information base for gender mainstreaming.
- In order to effectively serve the gender mainstreaming process, gender analysis requires sex-disaggregated data or information, and competent analysis of this information from a gender perspective.
- Analysis from a gender perspective needs to be based on relevant established theories about gender relations. Formulating good gender questions will point the analysis in the most productive direction.
- Finally, the analysis should include relevant conclusions about the causes and effects of any gender disparities it uncovers. Describing the situation is important, but analyzing the implications of this description is key to successful gender analysis.

NOTE: Understanding gender analysis in this comprehensive manner will ensure that it meets its goal: providing the information and analytical basis for more effective, efficient, and targeted policy formulation and decision-making.

Planning for Gender Analysis

Gender analysis consists of applying analysis from a gender perspective to various types of information and data. Since this specific use of information is the most important aspect of gender mainstreaming, it is crucial to be able to access the gender analysis you need and to use it appropriately for policy planning and decision-making.

Because gender analysis can be used in many different ways, it is equally important that you are able to identify what type of gender analysis you will require for every situation. If the information and analysis are not readily available, you will need to be able to know how to generate these.

To assist you, this section of the booklet includes information on the following questions, which roughly represent the various stages you need to consider when planning for gender analysis:

- When do I need to use gender analysis?
- What are my research questions?
- Who should perform gender analysis?
- What methodology of gender analysis should I use?
- What sort of results or outputs do I want to get from the gender analysis? How can I get those results?
- How should I commission gender analysis research?
- How can gender analysis be integrated into other research activities?

By considering your role and options in all of the above steps, you can ensure that you will gather the information you need to effectively address the gender dimensions of your policy or project.

When do I need to Apply Gender Analysis?

Gender analysis, in its various forms, can be used throughout the project or policy cycle. For our purposes here, this cycle can be approximately broken down into three stages (for a more detailed description of gender mainstreaming in the policy cycle, see Part 1 of this Toolkit, “Ten Steps”):

1. Project or policy design and development

Here, gender analysis is primarily a planning tool. It helps you to look at the existing situation and use this information to make decisions about the design of your intervention (i.e., your intended objectives, goals, and target audience and your planned actions).

Some questions that gender analysis seeks to answer during this stage are:

- What is the current situation of men and women in the sector of your planned intervention?
- Will the proposed project/policy contribute to existing inequalities in the situation of men and women?

- Does the proposed project/policy break down or challenge existing inequalities in the situation of men and women?
- Will the proposed project or policy change the perceptions or stereotypes about men and women, and their roles, in any way?
- What options should be considered to strengthen a gender perspective?

2. Monitoring a project or policy

Gender analysis can be used to help monitor progress from a gender perspective during the implementation of a project or policy as well.

Some questions to ask during the implementation of a project or policy include:

- Are both men and women equally involved in the process of implementation?
- Is progress towards any specific objectives related to men or women on track?
- Have any gender issues arisen that were not identified at the project/policy design stage? How can they be addressed?

3. Evaluating a project/policy

If gender analysis was part of the planning phase, then using gender analysis in the evaluation phase will allow you to see the extent to which your targets and goals were met. If gender analysis was not considered during the planning phase, introducing it here can still serve as an important learning tool to see how well a project or policy addressed the needs of both men and women. This information can then inform the development of future projects and policies.

Some questions to consider at this stage include:

- Did the project or policy change the situation of men or women? If so, for better or worse?
- Has the perception of men and women (norms, stereotypes, values) been at all altered during the course of this project or policy?
- If gender equality objectives were articulated during the planning phase, to what extent have these objectives been met?
- Have there been any unexpected or unintentional gendered effects of the project/policy?

NOTE: In each of these stages, gender analysis (information + analysis + gender perspective) can help you find the answers to these questions.

What Are My Research Questions?

Establishing your research questions is the next crucial step in performing gender analysis. These questions outline what it is you want your analysis to uncover or prove. These questions will be related to the various gender dimensions of the issue at hand.

You can use the information in this booklet to help you establish these questions. Specifically, see previous section “Analysis from a Gender Perspective: Asking ‘Gender Questions’”. This can help you apply basic gender theories to your policy or project in order to uncover your research questions. Also, “When do I apply gender analysis?” can help you determine what kinds of research questions you can use for different stages in the project or policy cycle.

EXAMPLE: Research Questions for Gender Analysis on Community-Police Partnership

A local government has allocated resources for a new initiative that aims to build stronger cooperation between the local police force and the community it serves. Currently there is low trust in the police force, and the community does not feel that their needs are being met. The goals of this initiative are to a) make the police force more responsive to the needs of the community and b) to improve the image of the police force in the eyes of the community.

These are some potential gender analysis research questions you might identify at the various stages of the project cycle:

Planning

- Does the police force have a declared policy and strategy on gender equality?
- In terms of those who use police services, do men and women have the same needs?
- Do men and women have different attitudes towards the police force?
- Do the police treat female and male community members in the same way?
- What specific training or other interventions might be necessary to make police more responsive to both men's and women's specific needs?

Implementation and Monitoring

- What is the quantity and quality of participation of men and women in all aspects of project implementation? (Note that target groups include both the community and the police force. The participation of men and women in both of these groups needs to be considered).

Evaluation

- How effectively has the initiative met the needs of men and women – in both the community and on the police force?
- How much has women's perception of the police force changed? And men's perception?

Once you have established the research questions, they will guide the other decisions you make regarding researchers, methodology, and outputs.

Who is Responsible for Performing Gender Analysis?

Depending on the situation, various individuals or groups might be responsible for performing gender analysis. This includes:

In-house

- You, as the staff member managing a given portfolio or a project manager or individual responsible for the policy/programme
- A gender expert with whom you work

Out-sourced

- An individual researcher or gender expert
- A think tank, commercial research firm, academic centre or other independent group

Alternatively, you may **combine these options** or engage a **team of researchers**.

Consider the following **check-list** before deciding who should perform the analysis:

- ✓ Do I have **access to the necessary information** for performing gender analysis – i.e., information and data disaggregated by sex?
- ✓ Do I have a sufficient **understanding of basic gender theories**?
- ✓ Do I understand these gender theories in relation to the policy or project in question – in other words, **how gender might be an important (yet often hidden) aspect of this issue**?
- ✓ Do I have the **time (or other necessary resources)** to perform the gender analysis adequately?
- ✓ Will my gender analysis be **credible** in the eyes of all stakeholders? (Sometimes an independent assessment is desirable, particularly if your position within government or a funding institution might compromise your neutrality.)

Performing the analysis yourself as part of your project duties may seem like the most cost effective option. However, this option might not always be desirable or possible. Whoever performs the research will require the following capacities:

- **substantive expertise** concerning the sectoral or policy issue (e.g., macroeconomics, 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., survey design, interviewing, economic modelling, cost-benefit analysis, etc.)
- **credibility** in the eyes of all stakeholders

NOTE: The appropriate balance of these elements is crucial in order to produce useful and viable policy options. Whether the gender analysis is performed by you or someone else, this may mean that you should engage a team of contributors to maximize the experience, expertise, and perspectives that will shape the analysis.

Methodologies for Gender Analysis

Different approaches to gender analysis can be used for different purposes. Gender analysis can be a quick and cheap exercise, or it can require a lot of time and resources. As a policy or project planner, you have to decide what level and degree of analysis is appropriate in the given situation – in other words, you need to choose an appropriate methodology. This will depend on economies of scale – that is, balancing required resources against the need for in-depth results.

Consider these examples of three different gender analysis methodologies and the objectives they can fulfil:

WHAT?	WHO?	HOW?	WHY?
A. Desk Study	Project/policy planner + baseline knowledge	Application of “gender questions” to existing data/knowledge	This is generally the least intensive level of gender analysis. If information is readily available and you have a good understanding of how basic gender theories relate to the situation, you may be able to do sufficient gender analysis on your own.
B. Focus Group Exercise	A variety of stakeholders (male and female), including those with gender expertise	Coming up with “gender questions” as a group and providing answers to them, based on existing knowledge of the group	This is more involved than a desk review, but it is still cost-effective and can provide greater in-depth analysis and results. By including project or policy stakeholders, the actual needs of men and women will be articulated, even if it is just a “sample.” Including a gender expert in the group will help you identify and apply the necessary gender theory and analysis to the situation.
C. In-depth Research Project or Sociological Survey	Qualified researcher with gender (and other relevant) expertise	(1) Analysis of existing statistical and other data; or (2) Collection of new data to provide detailed analysis of “gender questions” established in Terms of Reference	Such a project requires more time and resources than option A or B. It requires a sophisticated level of analysis and expertise. The pay-off, however, is detailed analysis that can provide great insight into the situation from a gender perspective. Instead of merely providing reasonable guesses or hypotheses about gender impact, in-depth research can substantiate these claims with sound scientific methodology.

Case study: Choice of Methodology

Creating Recreational Opportunities for Young People

This case weighs the benefits and drawbacks of using each of the analytical methodologies described above in reference to a municipal government plan to build a recreational complex for young people. It first establishes relevant research questions for gender analysis, and then considers which methodology would be most appropriate given the status of available information and the expertise of the project planner.

Background: Creating recreational opportunities for young people age 8 to 16 is a priority for the municipal government. Two factors contributed to this decision:

1. increasing levels of adolescent health problems due to low levels of physical activity, and

2. a problem of adolescent drug and alcohol use, which the government hopes to counter by offering alternative recreational activities for young people.

The government has decided to allocate substantial funds towards building an indoor recreational park, where facilities can be used free of charge. It will house facilities for ice hockey, basketball, swimming, and water sports as well as a small young people's library with internet facilities and an arts and crafts room. The complex will be built just outside the city – about 12 kilometres from the city centre.

The person responsible for this project has very little gender expertise, but the gender focal point in her department assisted her in coming up with the following preliminary "gender questions":

Will the facilities address the needs of both boys and girls?

- Do boys and girls enjoy the same activities? Will equal resources be given to those activities that boys enjoy and those activities that girls enjoy?
- Are low levels of adolescent athletic activity a problem for both boys and girls? Will there be equal athletic and non-athletic opportunities for both boys and girls?
- Do boys and girls equally use drugs and alcohol? Will the proposed project address the actual needs of this particular target group?
- What obstacles might exist for boys or for girls in terms of accessing the facility (transportation, hours of operation, conflict with other responsibilities in the home or community)?

Will the project break down gender stereotypes or norms and values associated with male and female roles?

- How will girls be encouraged to take part in activities that are traditionally dominated by boys (e.g., ice hockey, basketball, computers)?
- How will boys be encouraged to participate in activities traditionally dominated by girls (e.g., arts and crafts, reading)?

Given that women are the primary care-givers for young people, how does this affect the proposed project?

- Do mothers have access to personal transportation to bring their children to the remote location? If not, is public transportation convenient?
- Although the facilities are free of charge, what about the cost of equipment needed for ice hockey or other activities? Will mothers be responsible for paying for this?

Methodology Options for Analysis:

	Advantages	Drawbacks
A. Routine Desk Study: Policy planner uses existing information about the situation of boys and girls to try to answer the above questions.	<ul style="list-style-type: none"> • Cost effective. • Does not require large time investment. 	<ul style="list-style-type: none"> • There is little existing sex-disaggregated information about young people's recreational habits. • The responsible policy planner has little gender expertise. This exercise cannot counter any stereotypical ideas or values about appropriate activities for boys and girls that s/he may have, and her/his understanding of gender theories may not be sufficient to comprehensively tackle the research questions. • All conclusions about potential impact are at best "reasonable guesses" and therefore not entirely reliable.
B. Focus Group Exercise: A sample group of boys and girls and parents will be convened to discuss how the project will meet their needs.	<ul style="list-style-type: none"> • Both boys and girls directly participate as stakeholders. • Cost effective. 	<ul style="list-style-type: none"> • The sample is not representative of the general population of boys and girls (and may not effectively include the perspective of young alcohol and drug users). • Information gathered from boys and girls may not reveal their own gender biases.
C. In-depth Research Project: Experts are contracted to interview a large sample of young people and their parents to discover how the project will meet the needs of boys and girls respectively.	<ul style="list-style-type: none"> • A representative sample of boys and girls is used to generate data. • Data is objective and can eliminate bias of the policy planner. • Generates a wealth of valuable information that can be used for other projects as well. • Creates a baseline of data that can be used for project evaluation. 	<ul style="list-style-type: none"> • Requires a large investment of time and money.

After analyzing the options, it seems that a focus group (B) or an in-depth research project (C) would be most appropriate in this case. The final decision would depend on the resources available for gender analysis. (If sufficient resources for option C did not exist, option B would be a reasonable alternative).

Although in some cases a desk study is an adequate methodology for gender analysis, in this situation it would not be advisable. This is primarily because information about young people—their needs, their preferences, and their attitudes towards gender equality—is not collected as a matter of course. Without access to such baseline information, it would be difficult to perform a desk study that would yield adequate results.

Outputs: What Results do I Want?

Gender analysis can give you answers to questions at a variety of levels. It is important to know precisely what you want the analysis to give you so that you can plan the analysis exercise accordingly (which includes choosing an appropriate methodology and creating an appropriate terms of reference, if you are asking a researcher to do the analysis for you).

Consider the following spectrum of outputs:

What Can GENDER ANALYSIS Give Me?		
Description of Current Situation	<p>Gender analysis always begins with a description:</p> <ul style="list-style-type: none"> it can <i>quantitatively</i> describe the existing situation of individuals, disaggregated by sex it can also <i>qualitatively</i> describe the activities of men and women and the resources that they have access to and control over it can describe the context (macro situation) in which men and women operate. This can include cultural, historical, geographical, legal, and policy contexts as they relate to gender equality (e.g., norms and values, traditions, policy environment, etc). 	<p>Example: The National Human Rights Office receives complaints about human rights violations from the general public. Of these, 35 percent are from men; 65 percent are from women.</p> <p>Only 5% of complaints directly name gender discrimination as a problem.</p> <p>At the same time, the dominant cultural attitudes in this society very strictly enforce what is acceptable for men and women. For example, women generally do not work outside the home if they are married and have children. Men do not have the option to take paternity leave when they have children.</p>
Analysis of Current Situation	<p>Gender analysis should always include analysis of the description:</p> <ul style="list-style-type: none"> What are the causes of differences between men and women? What is the impact of these differences? What are the links between the individual situation and the macro context? 	<p>Example: Women register fewer complaints for several reasons:</p> <ul style="list-style-type: none"> Patriarchal attitudes and practices dissuade women from registering complaints. Women are less informed about the Office's complaints mechanism. The Office is located in the capital city and does not have branch offices in other locations, thus already limiting access. <p>Moreover, women are unaware of the <i>indirect</i> ways in which gender discrimination manifests itself.</p>
Suggestions of Options	<p>Gender analysis can suggest measures (general or specific) for changing the situation based on the research findings.</p>	<p>Example: The Human Rights Office should therefore:</p> <ol style="list-style-type: none"> 1) Provide more information specifically to women; 2) Educate the public about gender discrimination and indirect discrimination in particular; 3) Ensure that all members of society have access to the complaints mechanisms (including in rural areas).
Evaluation of Options	<p>Gender analysis can appraise the suggested options in terms of their costs and benefits to gender equality.</p> <p>It can also appraise benefits or risks associated with the proposed measures that do not directly relate to gender equality.</p>	<p>Example: Because the Human Rights Office has a large budget for education and awareness activities, solutions (1) and (2) noted above should be implemented as soon as possible. No additional resources are required.</p> <p>Solution (3) should be examined as a more long-term strategy, as additional resources will be required. A more detailed cost-benefit analysis of this option needs to be performed. It should be noted, however, that solution (3) will have great benefits not only in terms of gender impact, but also on greater accessibility of services in general.</p>

Knowing in advance what type of results you need will help you ensure that appropriate gender analysis is undertaken.

Commissioning Research

When hiring an expert to undertake gender analysis, generally you should follow the following process:

- Prepare a Terms of Reference (TOR) for the research (*see Checklist below*)
- Invite researchers to submit their research proposals
- Evaluate research proposals (*see Checklist below*)
- 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 be available to discuss and reach consensus with the researcher on any unforeseen obstacles that might arise in fulfilling the terms of reference.

Checklist for Preparing a Terms of Reference

A Terms of Reference should specify the following information:

- ✓ Background of the assignment
- ✓ Objective(s) of the research
- ✓ Specific research questions to be answered
- ✓ Necessary qualifications of the researcher
- ✓ Timeframe
- ✓ Remuneration and reimbursement of expenses
- ✓ Methodology
- ✓ Presentation of results
- ✓ Copyright of/access to databases and analysis

Checklist for Evaluating Gender Analysis Research Proposals

Gender analysis proposals should contain the following information, and as the commissioner of this research, you should question your researcher/analyst about anything that is 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 review? How rigorous is their understanding of gender analysis frameworks and basic gender theories?
- ✓ **Research question:** What will the basic data collection uncover? What will an analysis of the data highlight? Will the data be used to suggest concrete options for action and analysis of these options?
- ✓ **Theoretical framework:** How do basic gender theories inform the design of the research project? What assumptions does the researcher hold about gender relations and gender equality? It is important to ask this, because a researcher's own biases and assumptions about the dif-

ferences 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 the methodology include desk review, focus groups, in-depth surveys, other methods, or a mixture of the above?
 - 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 all data be disaggregated by sex and other important factors (e.g., age, urban/rural, ethnicity, economic status)? 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 the data tables?
 - How will the data tables be disaggregated (e.g., 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?

NOTE: Asking questions such as these will ensure that you get the results necessary for ensuring that projects and policies address the real needs of both men and women. Knowing what you want and need before undertaking the analysis is a key aspect of getting useful results.

How to Integrate Gender Analysis into all Policy Research

Finally, gender analysis does not have to be a “stand alone” exercise. Ways of integrating (mainstreaming) a gender perspective into *all* policy research that is commissioned by a government, NGO, or international organization should be systematically developed. This is not only cost-effective but will greatly enhance all research findings. As a result, any projects or policies developed on the basis of this research will be more effective.

Checklist for research proposal evaluation to help you ensure that a gender perspective is included:

- ✓ **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 men and women be researched? Will data be disaggregated by sex?

- ✓ **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)? Will the methodology be able to uncover differences in the situation or opinion of men and women?
- ✓ **Theoretical Framework:** Does the research include gender as an important variable in determining social processes? Are other important axes for analysis considered (ethnicity, socio-economic status, geographical location, etc.)? What are the assumptions about gender roles and relations (sexual division of labour, reproductive work, etc) that will inform the analysis? Does the research proposal demonstrate a good understanding of basic gender theories?
- ✓ **Proposed Outputs:** What level of outputs is proposed? Will any proposed recommendations include attention to any gender disparities that are revealed by the research?
- ✓ **Credibility:** Have steps been taken to ensure that the research will be valid and credible in the eyes of all stakeholders – of both genders? (This might include consultations and opportunities for providing inputs and comments.)
- ✓ **Presentation of Results:** Will any research report that is generated also highlight the gender dimension of the findings? (Even if no significant gender differences were uncovered, it is important to note this in the findings).

NOTE: being clear about your needs from the very outset will help you guarantee results you can use. Integrating gender analysis into all research is a very cost-effective way of increasing the information base you require to successfully practice gender mainstreaming in your work.

Gender Impact Assessment

Introduction

Gender impact assessment (GIA) is one type of gender analysis that is used specifically in analyzing public policy.

Gender impact assessment largely considers the effects of policies on the individual, rather than the household or community. These assessments seek to reveal how men as a group and women as a group may differ from each other in terms of their capacity to participate in and benefit from a given policy.

Gender impact assessment should have the final goal of promoting positive change in respect to gender inequality. In other words, these assessments should not merely ask whether a policy maintained or will maintain the “status quo” between men and women. Rather, a gender impact assessment has a positive role to play in determining policy opportunities to actively increase and enhance equality between men and women.

This section introduces you to the methodology and uses of gender impact assessment. This includes:

- When to use gender impact assessments (ex-ante and ex-post assessments)
- What gender impact assessment seeks to measure
- Pre-screening (relevance tests) to determine the need to perform a gender impact assessment
- Steps for doing an ex-ante and ex-post gender impact assessment
- Four case studies, adapted from actual experiences using gender impact assessment, that illustrate various ways that these assessments can be performed, their various goals, and their results.

NOTE: The gender impact assessment is an important analytical tool for predicting and revealing how projects and policies have affected or will affect men and women differently.

When to use Gender Impact Assessment

Gender impact assessment can be performed:

- **Ex- ante:** To assess the potential effects of proposed changes to policy or law. This assessment is conducted during the development stages of a policy or law (i.e., before implementation).
- **Ex- post:** To assess the real effects of an existing policy or law. This assessment is conducted either during the implementation of a policy to monitor its effects on men and women, or after the implementation of a policy or law, to evaluate its effects on men and women.

What Can Ex-Ante and Ex-Post Gender Impact Assessments Reveal?

Ex- ante assessment: Will women and men benefit from a proposed policy?

Example 1: A gender impact assessment of proposed changes to employment insurance in Country X 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.

Example 2: A gender impact assessment of the Working Families Tax Credit in Country Y 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.

If implemented, this policy would therefore help some women but harm others.

Ex- post assessment: Do women and men benefit from an existing policy?

Example 1: A gender impact assessment of new employment programmes in Country Z 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.

This policy therefore had a mixed impact on women.

Example 2: A gender impact assessment of a small-grant programme for nongovernmental organizations revealed that only 4% of grants went to NGOs that identified themselves as “women’s organizations.” However, 64% of grants went to NGOs whose director or president was a woman.

This policy therefore supported women’s participation in the NGO sector. However, it is unclear whether it supported organizations with specific gender equality objectives.

What is Being Assessed?

Policies can affect men and women in different ways and at different levels. Gender impact assessments should strive to produce a comprehensive picture of the wide variety of impact that policy measures can have. This impact can be considered according to four categories:

participation, resources, norms and values, and rights.

The following table describes these four areas in greater detail and illustrates how they might be relevant for a gender impact assessment of a rural eco-tourism initiative:

Area of Impact	Example: Proposed Pilot Programme For Developing Eco-Tourism In A Poor Rural Area
(1) 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.? Are men and women participating in equal capacities?	A gender impact assessment should consider: Will men and women be able to participate in this programme in equal numbers? Will men and women equally participate in leadership roles?
(2) Resources: Do men and women have equal access to resources in order to benefit from the policy? (Remember, resources include time, money, information, etc.) Will the policy or programme generate equal resources for men and women?	A gender impact assessment should consider: What existing resources are required to benefit from the programme (e.g., certain skills? matching funds? land? time to participate?). Do men and women have these resources in equal amounts? Will income generated from the programme benefit men and women equally? Will the scheme place an even greater burden on participating women's time?
(3) Norms and values: How will gender stereotypes and 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?	A gender impact assessment should consider: Will norms about "women's work" and "men's work" allow both men and women to participate equally in the programme? Will the programme help to challenge any existing stereotypes regarding gender roles?
(4) Rights: Do men and women have equal opportunity to benefit from the policy? Will the policy affect men's or women's rights directly or indirectly?	A gender impact assessment should consider: Are there any legal barriers to prevent either men or women from benefiting from the programme (e.g., land ownership laws)?

NOTE: Because the impact of policies and projects on men and women, both direct and indirect, is diverse and often difficult to identify, a gender impact assessment deliberately assesses each of these four areas to create a comprehensive picture of that impact.

Always Necessary? Relevance Tests

Gender impact assessment is a serious exercise that yields very important information necessary to make informed policy choices. Because of the resources required to perform these important analyses, it may be necessary to determine priorities. This way, resources can be devoted to analyses that will have the greatest effect on policy making. No policies are gender neutral, but different policies will have greater or lesser gender impact.

In order to determine these priorities, the policies in question can be tested for relevance. In other words, a predetermined system can be applied that will help you assess the level of priority to be placed on performing a gender impact assessment in each situation.

Below, three different tools are suggested as pre-screening "relevance tests" that anticipate the likelihood of significant gender impact. Not every tool will be useful in every situation. The following chart can serve as a guide to deciding which pre-screening relevance test is most appropriate in each situation.

Type of Relevance Test	Who Performs This Test?	This test is best used when...
1. Criteria-based relevance test	You (person responsible for the policy or project)	<ul style="list-style-type: none"> • you have a strong understanding of basic gender theories and their applicability in the given situation • you have access to detailed sex-disaggregated data in the specific policy area • gender impact is very obviously high (i.e., not necessary to consult with experts)
2. Consultation-based relevance test	(1) Gender expert <i>or</i> (2) Group of experts including gender expert	<ul style="list-style-type: none"> • You are unsure of how basic gender theories apply to the given situation • There is little documented information and sex-disaggregated data in the specific policy area • You are quite unsure as to how significant gender impact might be
3. Mixed test (based on criteria and consultation)	You (person responsible for the policy or project) in consultation with experts	<ul style="list-style-type: none"> • You are unsure of how basic gender theories apply to the given situation • There is some documented information and sex-disaggregated data in the specific policy area • You are quite unsure as to how significant gender impact might be

With all of these tests, however, it must be noted that there is no clear definable limit of when a gender impact assessment must be performed or not. The purpose of these tests is to paint a picture of the likely gender impact of a policy. This picture then has to be interpreted, taking into account the overall policy context. **Unless gender impact can be excluded, an impact assessment should be conducted.**

Criteria-Based Relevance Test

The criteria-based relevance test asks policy makers to go through a four-part checklist of questions about the policy or intervention in question. The answers will indicate the level of priority for performing a gender impact assessment. As you will see, however, a considerable amount of information and understanding regarding gender issues is required in order to complete this test.

Criteria-based relevance test

Section 1: Background Information

- a) What is the nature of the planned intervention?
- b) Who are the direct target beneficiaries?
- c) Who are the indirect target beneficiaries?

Section 2: Direct Beneficiaries

- a) Will the planned intervention affect men and women differently within the target direct beneficiary group in any ways in relation to their:
- **Participation** (e.g., Will it influence male or female target beneficiaries' ability to participate in the labour market, in decision-making, or in family activities?)
 - **Resources** (e.g., Will it result in more or less resources such as income, time, or skills for male or female target beneficiaries?)
 - **Norms and values** associated with either gender (e.g., Will it reinforce or challenge gender stereotypes of the target beneficiaries?)
 - **Rights** (e.g., Will it represent a violation of the rights of women or men?)
- b) Does the planned intervention in any way concern:
- **gender-specific reproductive health issues** (e.g., related to pregnancy)
 - the **differing physio-biological conditions** of men and women (e.g., related to gender-specific conditions such as ovarian or prostate cancer)
 - the **gender-specific vulnerabilities or sensitivities** of men and women (e.g., related to violence against women)
- c) What **proportion** of men and women will be affected in the above ways?
- d) To what **degree** and for what **duration** will men and women be affected in the above ways?

If the data situation is weak, note this and make an estimate, stating what the estimate is based on. Where there is no data, state this as well.

Section 3: Indirect Beneficiaries

- a) Will the planned intervention affect men and women differently within the indirect beneficiary group in any ways in relation to their:
- **Participation** (e.g., Will it influence male or female indirect beneficiaries' ability to participate in the labour market, in decision-making, or in family activities?)
 - **Resources** (e.g., Will it result in greater or fewer resources such as income, time, or skills for male or female indirect beneficiaries?)
 - **Norms and values** associated with either gender (e.g., Will it reinforce or challenge the gender stereotypes of the indirect beneficiaries?)
 - **Rights** (e.g., Will it represent a violation of the rights of women or men?)
- b) Does the planned intervention in any way concern the following aspects of indirect beneficiaries:
- **gender-specific reproductive health issues** (e.g., related to pregnancy)
 - the **differing physio-biological conditions** of men and women (e.g., related to gender specific conditions such as ovarian or prostate cancer)
 - the **gender-specific vulnerabilities or sensitivities** of men and women (e.g., related to violence against women)
- c) What **proportion** of men and women will be affected in the above ways?
- d) To what **degree** and for what **duration** will men and women be affected in the above ways?

If the data situation is weak, note this and make an estimate, stating what the estimate is based on. Where there is no data, state this as well.

Section 4: Evaluation

Based on the above, is a full gender impact assessment required for this intervention or parts thereof? For which parts? If not, justify why not. This decision requires a judgement based on significance of the potential impact.

NOTE: Remember that there are no clearly definable limits for deciding that a GIA must or may not be conducted. If screening shows that men and women are diversely affected, a GIA should be carried out. Even the existence of one indicator is sufficient for an assumption of gender relevance (for example, if the intervention would represent a severe violation of basic rights). A GIA should also be conducted if gender relevance cannot be excluded.

Consultation-Based Relevance Test

Because of the considerable information and knowledge required to complete the criteria-based relevance test, you might instead choose a consultation-based relevance test. The idea here is to ask the expert(s) to give you an official viewpoint on the likelihood of gender impact in the case of your particular planned intervention. Because these experts have considerable knowledge and experience, they will be able to make valuable assessments even in the face of little or no official data.

Consultation-Based Relevance Test

1. Ask a qualified gender expert to prepare an official viewpoint about the likelihood of significant gender impact of the planned intervention; or
2. Ask several qualified experts to prepare an official viewpoint about the likelihood of significant gender impact of the planned intervention.

Based on these viewpoints, decide on the need to conduct a full gender impact assessment.

Mixed (Consultation and Criteria-Based) Relevance Test

This test is a mixture of both the criteria- and consultation-based tests.

Mixed Test

Complete the above criteria-based relevance test and ensure its soundness by consulting with a specified number and type of experts in order to prepare your inputs. Based on the results, decide on the need to conduct a full gender impact assessment.

NOTES: If, after completing one of the above relevance tests, it seems as though your planned intervention might have a significant differential impact on men and women, you should then move on to perform a full gender impact assessment.

Ex-Post Relevance Tests: All of the above relevance tests can also be used to gauge whether an ex-post gender impact assessment should be done for an already implemented project or policy. In this case, the above questions should be asked regarding the impact that the policy or project *has had* on men and women as both direct and indirect beneficiaries

Steps for Gender Impact Assessment

While the scope and depth of gender impact assessment 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 (ex-ante) or of any policy or legislation already (partially or fully) implemented (ex-post).

	EX-ANTE ASSESSMENT	EX-POST ASSESSMENT
1.	Identify the position of men and women prior to policy development with respect to participation, resources, norms and values, and rights. This serves as the baseline against which to measure anticipated change or lack of change.	Identify the position of men and women prior to policy implementation with respect to participation, resources, norms and values, and rights. This serves as the baseline against which to measure real change or lack of change.
2.	Assess the trends in men's and women's position independent of the proposed policies. In other words, if the policy is not implemented, what will the situation of men and women be, respectively?	Assess the trends in men's and women's position independent of the implemented policies. In other words, if the policy had not been implemented, what would have been the likely situation of men and women, respectively?
3.	Determine the priority to be attached to promoting gender equality through this policy, 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 significant would the gender impact of this policy be?	Determine the priority that was attached to promoting gender equality through this policy. In other words, how significant was the anticipated impact?
4.	Assess the potential impact of the policy on the men and women who are its direct beneficiaries. You should pay attention not only to easily quantified results (for example, numbers employed), but also to less easily measurable results (for example, quality of jobs, job security, promotion prospects). Assess both short and long-term costs and benefits.	Assess the real impact of the policy on the men and women who were its direct beneficiaries. You should pay attention not only to easily quantified results (for example, numbers employed), but also to less easily measurable results (for example, quality of jobs, job security, promotion prospects). Determine existing costs and benefits, and assess additional projected long-term costs and benefits.
5.	Assess the potential 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.	Assess the real impact of the policy on particular groups of women and men . For example: What has been the impact 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 potential indirect affects of the proposed policies on families and children, elderly or ill dependents , or others who may be indirectly affected.	Assess the real indirect affects of implemented policies on families and children, elderly or ill dependents , or others who were indirectly affected
7.	If the ex-ante assessment of the policy predicts a negative affect on gender equality or retention of status quo inequality, then identify ways in which the policy could be redesigned or re-specified to promote gender equality.	If the ex-post assessment revealed a negative affect on gender equality or the retention of status quo inequality, then suggestions for further corrective action should be specified.

Case studies- Gender Impact Assessment

CASE 1: Asking “Gender Questions”- An Ex-Ante GIA of Changes to Hospital User Fees

This case study illustrates how the seven steps of a gender impact assessment can be applied to the proposed introduction of hospital user fees during a health sector restructuring programme. The table suggests various gender questions that the researchers would need to investigate in order to comprehensively determine the impact of this change on both men and women.

Proposed policy change: 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 consequences might be hidden below the surface?

Some of the gender questions we need to ask during a gender impact assessment include:

Step 1: Establish baseline information	<ul style="list-style-type: none"> Who currently uses hospital services more – men or women? Do women and men have the same level of disposable income to pay for these services? Who (men or women) is generally responsible for ensuring that children and elderly have access to needed health care?
Step 2: Assess gender trends	<ul style="list-style-type: none"> Is there any evidence that demand for hospital services by men or women would increase or decrease significantly <i>without</i> the introduction of fees? If yes, how will the new policy address these trends? (For example, if a growing shortage of community-based doctors means that demand for emergency hospital services will be increasing, will this demand be the same for men and women?)
Step 3: Determine priority and significance of gender impact	<ul style="list-style-type: none"> Do any basic gender theories suggest that user fees in relation to healthcare will have a significant gender-differentiated impact? <i>(Yes: Access to public services and resources including time and money are often very different for men and women, given their different roles. Since a gender-differentiated impact is therefore likely, an in-depth gender impact assessment of the policy's potential impact should receive high priority.)</i>
Step 4: Assess potential impact on men and women	<ul style="list-style-type: none"> If women have less disposable income than men, will their access to hospital care become limited? If women are primarily responsible for the health care of children and the elderly, will they have the increased burden of paying fees for these groups as well?
Step 5: Assess potential impact on specific groups	<ul style="list-style-type: none"> Certain groups of women have even smaller disposable incomes – which are these groups? Are there specific groups of men who may also have very limited disposable income? How will these new fees affect their access to hospital care?
Step 6: Assess indirect impact	<ul style="list-style-type: none"> If fees mean that hospital stays will likely become shorter, this means that sick people will now have to spend more time recuperating at home. Women will likely be primarily responsible for providing this care. How will this affect women's economic and social opportunities? In other words, will women be responsible for “picking up the slack” of what will no longer be publicly funded?
Step 7: Identify potential changes to the policy	<ul style="list-style-type: none"> Given the likely impact such a change will have on women in particular, how can this impact be mitigated? If the proposed policy is accepted and implemented, what other policies need to be put in place to address the impact (e.g., additional support and resources for home care for sick people, policies to grant employees leave to look after sick relatives, etc.)?

NOTE: Evidently, this proposed policy is likely to have a significant gender-differentiated impact. In order to ask relevant questions during a gender impact assessment, you need to have a basic understanding of theories and trends on the roles of women and men in society, and the impact that these differentiated roles can and do have.

CASE : Ex- Ante GIA of a Justice Services Improvement Project

This case study describes a gender impact assessment that was undertaken during the development of a justice services improvement project in Peru (2001–2002), led by the World Bank.¹ It provides the justification for the GIA and shows what the assessment revealed and how that significantly affected project implementation.

Background: When the World Bank agreed to support a justice services development project in Peru, the initial justification for the project included the following:

- Recognition that the country's justice sector was weak
- Poor access to justice (inefficient institutions, costly services, disconnect between supply and demand)
- Limited and unevenly distributed services (1 judge for 15,000 Peruvians, only 249 public defenders for 26.1 million population)
- Rural areas disproportionately affected
- Users dissuaded and blocked by costs and difficulties understanding complex legal procedures

However, while preparing the project, it was brought to the attention of the World Bank that many of these obstacles hurt women much more than men (given that many women were less educated, less informed, economically dependent on others, and victims of various types of violence). Therefore, a Gender Impact Assessment was undertaken.

Purpose of the Gender Impact Assessment:

- To more clearly define and understand these access issues and obstacles for men and women

Methodology of the Gender Impact Assessment:

- Review of relevant literature
- Examination of national legal framework
- Analysis of statistics on the use of judicial services (disaggregated by sex)
- Interviews with court users
- Substantial information and cooperation from NGOs

Main Findings of the Gender Impact Assessment:

- Women and men have different justice needs and tend to use justice services based on their social roles
- Men are more likely to use justice services
- Men are more active litigants in commercial, contractual, and credit-related cases
- Women are more active plaintiffs in cases involving child support, domestic violence, and divorce
- Men are more active as defendants in juvenile crime and child custody cases
- Institutional weaknesses of family courts exacerbated gender inequalities in the sector

¹ World Bank (2005), 'Engendering justice: a gender assessment's impact on project design', Prem Notes, No. 98, www1.worldbank.org/prem/PREMNotes/premnote98.pdf#search=%22engendering%20justice%22

- In seeking redress for family court problems, women suffered mistreatment by authorities, ignorance of applicable laws, lack of access to legal counsel, biased behaviour by officials
- Biased child custody settlements had more negative social and economic consequence for women

Implications for Project Design:

The findings of the GIA resulted in **changes to the project**, including the following:

- Addition of a component that specifically addresses access to justice issues
- Inclusion of financing to train lay justices and community leaders on mediation techniques in family conflicts and gender-related issues
- Inclusion of strengthening of the family court system
- Inclusion of gender specialists in various activities

NOTE: This case study illustrates the tangible value that gender impact assessments can have. Project funds can be better targeted and the needs of the project beneficiaries can be more effectively and efficiently met.

CASE: Ex-Post GIA of Environmental Policy on Radiation Protection

This case study briefly describes one federal government's development of a systemic process for applying gender impact assessment to all environmental policies, and illustrates this with the example of a policy on radiation protection².

Background to the new ordinance on radiation protection: In 2001, an earlier ordinance which dealt with protection of individuals who might be exposed to radiation as part of their occupation was amended. This amended ordinance:

- a) set new limits for radiation exposure for the foetus and a reduction in radiation doses for the uterus;
- b) re-regulated access to so-called controlled areas;
- c) repealed a general ban on access for pregnant women and replaced it with a differentiated protection concept;
- d) included new detailed provisions on workplace design, stringent monitoring of radiation exposure, and improved information particularly aimed at pregnant women and nursing mothers.

The motivation for these changes was to provide greater radiation protection that considered reproductive health risks both for (potentially) reproductive adults and for unborn foetuses, while at the same time not limiting the rights and participation of workers based on their sex or reproductive capacity.

The Gender Impact Assessment: This gender impact assessment was undertaken as a pilot project for determining how to assess gender impact of environmental policies. Therefore, this assessment also served as a test case for developing a process by which all environmental policies could be assessed in the future in terms of their gender impact.

² This case study has been adapted from a report by D. Hayn, R. Schultz, on behalf of the Ministry of Environment, Nature Conservation and Nuclear Safety, Germany. Certain details of the original case have been modified for the purpose of clarity and simplification, and therefore the case is not presented as a factual example.

As a result, a **GIA Checklist was developed** that included **three mandatory stages** for any GIA:

- a) Pre-analysis (Relevance Test):** In this stage, the policy is first screened to determine whether or not a full gender impact assessment would be relevant. This is a key point, as it makes efficient use of resources; only those policies that have a potentially differentiated gender impact will be subject to further impact analysis.
- b) Main analysis:** Here, policies for which gender impact is relevant undergo an in-depth analysis of what the impact of the policy has been on both men and women.
- c) Evaluation and Recommendations:** Finally, the institutional mechanism accountable for monitoring gender impact considers the assessment data and makes an official evaluation of the policy. It is important to note that this evaluation weighs environmental policy objectives against equality policy objectives. Furthermore, evaluation criteria stipulate that all policies should aim not simply to uphold the status quo in terms of gender equality, but rather to positively affect the state of gender equality. This positive obligation was a key point in the development of GIA standards.

Once these procedures were established, the specific gender impact assessment on radiation protection was undertaken.

- 1. Pre-analysis (Relevance Test):** Because the policy had a direct affect on reproductive health, it was deemed to be likely to have different affects on men and women. Relevance was therefore established, and researchers proceeded to the main analysis.
- 2. Main analysis:** The main gender questions that the GIA on radiation protection aimed to assess and investigate were:
 - a) Why do different gender-specific regulations apply to women and men with respect to reproductive health?
 - b) What are the effects of the new regulations on the health of men, women, and unborn children?
 - c) What are the effects on the occupational situation of men and women in occupations exposed to radiation?
 - d) What are the effects of the new regulations on the duties of safety officers?

The overarching question that the GIA aimed to answer was: Did the new provisions achieve a positive alliance of radiation protection objectives and gender equality objectives?

- 3. Evaluation and Recommendations:** Overall, having weighed up the individual aspects, the GIA concluded that the new provisions achieve improved gender equality.

This was primarily because the new ordinance removed restrictions on women's rights and participation that had existed in the previous ordinance, but also because further protection for both men's and women's reproductive health had been put in place. At the same time, achieving gender equality objectives did not compromise the environmental policy objectives (i.e., better radiation protection), and in fact enhanced their achievement.

Nonetheless, suggestions for improvement to the policy were also put forth, for example, the need for more information for women exposed to radiation and radiation safety officers.

NOTE: Although environmental policy (and radiation protection in particular) may seem to be “gender neutral,” this case study shows how such policy can in fact affect men and women (in this specific case, their rights and participation) differently. Conducting a gender impact assessment not only shows how policies can be improved in terms of gender impact, but also – as it did in this case – how policy changes have in fact improved the state of gender equality.

CASE: Ex-Ante GIA of National Development Planning

Gender impact assessment can (and should) be integrated as a standard and mandatory aspect of the overall policy-making process. The following case study shows how GIA is included as an integral part of one country’s National Development Plan (a comprehensive and multi-sectoral policy initiative that has been allocated significant funds over a 10-year period) through the creation of standard GIA guidelines.³

NOTE: As illustrated here, the provision of standard tools, guidelines, and support to those responsible for developing projects makes gender impact assessment much more straightforward.

Background: The achievement of equal opportunities between men and women is a cross-cutting principle of the National Development Plan (NDP). One key action for implementing this principle is the mandatory assessment of impact on gender equality during the development stage of all projects that are part of the NDP. This impact is then to be included among the project selection criteria for all projects or measures to receive funding.

The **Guidelines for Gender Assessment** are implemented in the following way:

- a) Creating a Baseline of Information:** All programmes should contain a brief description of the baseline position in relation to equal opportunities between men and women at sub-programme and project level and, where appropriate, targets for the anticipated impact. The baseline description should be either quantitative or qualitative. A qualitative description will be sufficient where no quantitative gender disaggregated data currently exists. Where it would be potentially cost effective in improving the equal opportunities impact of measures under the Plan, gender disaggregated data should be gathered
- b) Project Development:** The GIA forms (*see next page*) outline the basic steps to be taken to carry out a gender impact assessment at the project development stage. These forms will allow assessment of the extent to which equal opportunities feature in projects, and should assist in revising projects appropriately before being submitted for selection.
- c) Project Selection:** The National Development Plan provides that the inclusion of gender impact will be a mandatory criterion in project selection for all projects. The following table should be completed for every project or scheme in order to guide and inform the selection process for the submitted project:

Impact of Expenditure Activity on Equal Opportunities			
	Positive relative to existing situation	Negative relative to existing situation	Neutral relative to existing situation
Women			
Men			

³ This case study has been adapted from the Government of Ireland’s GIA guidelines in connection with their National Development Plan. However, because certain changes have been made for the purposes of simplification and clarity, this case should not be construed as Ireland’s experience *per se*.

d) Monitoring: All monitoring committees must include representatives from the Equality Authority to represent the interests of equal opportunity in strategic decision making. Moreover, a baseline for the female participation rate in monitoring committees should be established by reference to the composition of the previous monitoring round. Where female participation is less than representative of the general population, a target to improve this representation should be set.

Additionally, a baseline of information and gender equality targets established at the project development stage should be used to establish appropriate monitoring plans.

e) Evaluation: The terms of reference for all evaluations should include impact on equal opportunity as a criterion for evaluation.

NOTE: This case study demonstrates how gender impact assessment can be approached as an integral part of policy making at the development, monitoring, and evaluation stages. By tying an obligation to perform a gender impact assessment to the allocation of funds, accountability for and transparency of assessing gender impact can be achieved.

National Development Plan
Gender Impact Assessment Forms

Programme _____
Measure/Project _____

Step One: Outline the current position of men and women in the area which this expenditure activity will address.

Who are the current beneficiaries of this area of expenditure activity? (Beneficiaries include users of the facility, or participants)
How many are women?..... How many are men?.....
What data source did you use to determine these figures?.....

Step Two: What factors lead to women and men being affected differentially in the area being addressed by this expenditure activity?

Identify the factors which lead to the differential impact on women and men.

a
b
c
d

Step Three : How can the factors which lead to women or men being affected differentially be addressed and changed?

How can the policy proposal/measure respond to the factors identified in Step 2 above?

a
b
c
d

Where considered appropriate, what actions do you propose in this regard?

a
b
c
d

Summary and Conclusions

What is Gender Analysis?

Gender analysis provides the necessary information base for gender mainstreaming. It uses sex-disaggregated data or information, and analyzes it from a gender perspective. This analysis needs to be based on relevant established theories about gender relations, and should make conclusions about the causes and effects of any gender disparities it uncovers.

Gender analysis can use a variety of methodologies – from a desk study of existing data to undertaking large-scale sociological research projects. It may be performed by you, a gender expert, or a team of experts with the necessary skills and experience.

Why is Gender Analysis Necessary?

In our societies, gender inequalities are very entrenched. Therefore, these inequalities (and their causes and consequences) are not always obvious. Unfortunately, we are so used to them that we often fail to examine them critically. The first objective of gender analysis is thus to make visible any differences between men and women. Gender analysis then investigates the causes and consequences of these differences in order to appropriately address them through policy intervention. By providing the necessary information and analytical base, gender analysis can achieve its ultimate goal: more equitable, effective, and targeted policy formulation and decision-making.

When is Gender Analysis Necessary?

Gender analysis needs to become a part of *all* policy making processes and programme formulation. Because all public policy concerns the population in some way, no policy is gender neutral. Gender analysis is necessary to determine how and to what extent men and women are or will be differently affected by projects and policy interventions.

Gender analysis is therefore a vital tool for project or policy design, implementation, and evaluation. The depth and level of analysis depends on your specific situation and policy needs.

What is Gender Impact Assessment?

Gender impact assessment (GIA) is a specific type of gender analysis that is used to predict and reveal how projects and policies have affected or will affect men and women differently. GIA shows how men as a group and women as a group may differ from each other in terms of their capacity to participate in and benefit from a given policy. These assessments have a positive role to play in determining policy opportunities to actively increase and enhance equality between men and women.

The only way to ensure that policies and projects achieve effective and equitable results is to use appropriate gender analysis.



Glossary of Key Terms and Concepts for Gender Mainstreaming

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:

Accountability: means that an entity can be held responsible for its actions. In terms of human rights, accountability refers to whether a state, person or other entity can be held responsible, either legally or otherwise, for the protection, promotion and fulfillment of human rights, and/ or for the violation of such rights.

In general, only states can be held accountable in international law for human rights protection and/or violation. However, in recent years, there has been a movement towards holding non-state actors accountable for human rights protection and/or violation, especially through non-legal mechanisms.¹

Advocacy: The act of pleading for, supporting, or recommending a cause or course of action².

Affirmative Action: is a practical policy to increase the diversity of an organization through human resources initiatives such as quotas for hiring women, people of colour, and people with disabilities.³

Beijing Declaration/ Platform for Action 1995: represented an international agenda for achieving women's rights and empowerment. The Beijing Declaration was a statement of commitment by the 189 participant governments that the status of women had to be improved by removing obstacles to education, health and social services. They recognized that efforts to improve women's participation in decision-making roles and the further participation of women in economic, social, cultural and political spheres must coincide with action to deal with problems of violence against women, reproductive control, and poverty. The Platform for Action laid out specific directives for governments, international organizations, national organizations and institutions to achieve the commitments of the Beijing Declaration.⁴

¹ Association for Women's Rights in Development (AWID).

² AWID.

³ AWID.

⁴ AWID.

The Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW): is an international treaty which lists the human rights of women. It is commonly referred to as the "Women's Convention" or "CEDAW." CEDAW was adopted by the United Nations General Assembly in 1979 and entered into force in 1981. As of May 2003, 173 countries had signed CEDAW, though many have broad reservations in relation to it.

CEDAW contains guarantees of equality and freedom from discrimination by the state and by private actors in all areas of public and private life. It requires equality in the fields of civil and political rights, as well as in the enjoyment of economic, social, and cultural rights. Both direct discrimination and indirect discrimination are covered by CEDAW.

Under CEDAW, state parties assume different obligations with respect to the elimination of discrimination in a number of fields. A number of provisions in CEDAW require immediate steps to be taken to guarantee equality, while other provisions are of a more programmatic nature, under which state parties must take "all appropriate measures" or "all necessary measures" to eliminate particular forms of discrimination.⁵

Disaggregation by Sex: This refers to data or statistics that are collected and presented by sex to show the respective results for women and men separately. Sometimes the term gender disaggregation is used to refer to sex disaggregated data.

Decent work: Productive work that generates adequate income and ensures adequate social and legal protection. The primary goal of the ILO is to promote the opportunity for women and men to obtain decent and productive work [in both the formal and informal sector], in conditions of freedom, equity, security and human dignity.⁶

Discrimination:

Direct discrimination occurs when a person is treated less favourably than another in a comparable situation, on grounds such as sex.

Indirect discrimination occurs when an apparently neutral provision, criterion or practice would disadvantage people on grounds such as sex unless the practice is objectively justified by a legitimate aim and the means of achieving that aim are appropriate and necessary.⁷

Empower: to enable someone to have legal power and authority. It also means people's efforts to form relationships between themselves and the world so that they may be better able to change the things that are causing them problems. This involves the creation of new ideas, new understandings and new knowledge. Education should be an empowering, active process.⁸

Engendering: to make visible the different impact on or impact of women and men and their genders in a given context. Engendering also involves the recognition that the gender division of labour and its associated norms, values and ideologies about masculinity and femininity are defined by a

⁵ AWID.

⁶ AWID.

⁷ EC Council Directive 2000/43/EC.

⁸ AWID.

complex of power relations which tend to accord to women lesser political voice, social/ cultural value, and access to and control over economic resources. These power relations of gender vary with historical and regional context, in addition to being cross cut by other social relations of class, caste, ethnicity, or race within a given society.

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 Analysis: Also referred to as **gender-sensitive**, **gender-based** or **gender-aware analysis**, this is analysis that (a) makes visible any disparities between genders and (b) analyzes these disparities according to established sociological (or other) theories about gender relations.

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 term is not the most important thing – our focus should be on the general principal that all of these concepts refer to.

Gender Balance: Gender balance refers to the ratio 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-based violence: Violence against women is any act of gender based violence that results in, physical, sexual, psychological harm or suffering to women, including threats of such acts, coercion or arbitrary deprivation of liberty whether occurring in public or private life.

Gender-blindness: means ignoring the different socially determined roles, responsibilities and capabilities of men and women. Gender-blind policies are based on information derived from men's activities and/or assume those affected by the policy have the same (male) needs and interests.⁹

⁹ Kabeer (2003).

Gender budgeting: A variety of processes and tools that attempt to assess the impact of government budgets, mainly at the national level, on different groups of men and women, through recognizing the ways in which gender relations underpin society and the economy. Gender or women's budget initiatives are not separate budgets for women.¹⁰ They include analysis of budgets, and policy impact based on gender and are also commonly referred to as Gender-Responsive Budgeting or Gender-Sensitive Budgeting.

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/Sexual Division of Labour: learned behaviour in a given society/community that conditions the division of labour in the productive systems- in other words, which activities, tasks and responsibilities are perceived as male and female and largely performed accordingly.

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 them.

De jure equality (sometimes called formal equality or "paper governance") refers to equality under the law. **De facto equality** refers to equality in practice.

Gender Equity is the process of being fair to women and men. To ensure fairness, measures must often be available to compensate for historical and social disadvantages that prevent men and women from otherwise operating on a level playing field. Equity leads to equality.¹¹

Gender Impact Assessment: Examining policy proposals to see whether they will affect women and men differently, with a view to adapting these proposals to make sure that any discriminatory effects are neutralized and that gender equality is promoted.

Gender-neutral: Gender-neutral policies are not specifically aimed at either men or women and are assumed to affect both sexes equally. However, they may actually be gender-blind.¹²

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.

¹⁰ Kabeer (2003).

¹¹ Gender and Water Alliance.

¹² Kabeer (2003).

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: 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 men and women from making choices and fully enjoying their rights.

The Glass Ceiling: refers to impediments that prevent women from rising to top positions in an organization, whether public or private. Thus, this includes the political, public, judicial, social, and economic domains. The term "glass" is used as these impediments are apparently invisible and are usually linked to the maintenance of the status quo in organizations as opposed to transparent and equal career advancement opportunities for women and men within organizations.

Reproductive Health: is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity, in all matters relating to the reproductive system and to its functions and processes. Reproductive health therefore implies that people are able to have a satisfying and safe sex life and that they have the capability to reproduce and the freedom to decide if, and when and how often to do so.¹³

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.

Sexual Harassment: is unwanted sexual attention that intrudes on a person's integrity. This includes requests for sexual favours, unwelcome or demeaning remarks, or touching. It is a form of discrimination and is about an abuse of power.¹⁴

Socialization: means that people are taught to accept and perform the roles and functions that society has given them. Men and women are socialized into accepting different gender roles from birth. Establishing different roles and expectations for men and women is a key feature of socialization in most societies.¹⁵

¹³ AWID.

¹⁴ AWID.

¹⁵ AWID.

Violence against women: any act of gender-based violence that results in, or is likely to result in, physical, sexual, or psychological harm or suffering to women, including threats of such acts, coercion, or arbitrary deprivation of liberty, whether occurring in public or in private life.

Violence against women shall be understood to encompass, but not be limited to, the following:

- Physical, sexual, and psychological violence occurring in the family, including battering, sexual abuse of female children in the household, dowry-related violence, marital rape, female genital mutilation and other traditional practices harmful to women, non-spousal violence, and violence related to exploitation;
- Physical, sexual, and psychological violence occurring within the general community, including rape, sexual abuse, sexual harassment and intimidation (at work, in educational institutions, and elsewhere), trafficking in women, and forced prostitution;
- Physical, sexual, and psychological violence perpetrated or condoned by the State, wherever it occurs¹⁶.

Women's Empowerment: A 'bottom-up' process of transforming gender power relations, through individuals or groups developing awareness of women's subordination and building their capacity to challenge it.¹⁷

¹⁶ UN General Assembly Resolution 48/104 (1993).

¹⁷ AWID.

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Governance, Participation and Human Rights

Enhancing Women's Participation through Education in Belarus

This case study appears in the Governance and Participation brief

A project supported by UNDP and the Japan's Women in Development Fund helped to enhance women's impact on the legislative process by providing a series of training to 678 women. The project has established a unique gender-oriented university programme at the Institute of Business and Management Technologies of the Belarusian State University which has enabled more than 30 women to complete master's degrees in business administration.

The project's slogans – "(Wo)man invented the wheel", "(Wo)man invented the alphabet", "(Wo)man kindled the fire", and "It is never too early/late to become a leader" – have encouraged people to take a fresh look at gender inequality. The dissemination of research findings on gender issues, the development of modules for lawyers and journalists, the creation of a statistical book, *Women and Men in the Republic of Belarus* (2003), and similar publications have created a new discourse on gender mainstreaming and human rights. Expertise gained from the project has been used to draft the National Action Plan on Gender Equality for 2006 – 2010, and the gender equality law concept. The share of women in parliament rose to 30 percent during the course of the project; two female project participants have won seats in the lower chamber of parliament.

Written by: Alina Ostling, UNDP Belarus

Advocacy for Gender Sensitive Policies in Turkey

UNDP provided support to parliamentarians in building their understanding of the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). Two events were organized for parliamentarians in partnership with NGOs to familiarize them with the CEDAW principles on gender equality in Turkish legislation. This has succeeded in generating CEDAW "champions" in the Grand National Assembly who have committed themselves to the harmonization of domestic laws, including the Criminal Code, in line with the Convention. UNDP also provided support to legislators and drafters of Turkey's current Local Administration Reform package. It succeeded in helping to establish dedicated women's platforms as legal local government entities.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Promoting Gender Equality in Lithuania

This case study appears in the Governance and Participation brief

Promoting equal opportunities and gender equality is high on the agenda of the National Human Rights Action Plan of Lithuania. With UNDP support, the *ombudsman* institution, established in 1999, has been particularly instrumental in responding to gender needs, ensuring greater use of gender

analysis and empowering women through awareness raising and advocacy campaigns. The October 2004 elections have produced the biggest-ever proportion of women in parliament: 29 women out of 141 MPs (21 percent).

Written by: Ruta Svarinskaite, UNDP Lithuania

Combating Trafficking in Women in Belarus

This case study appears in the Human Rights and Justice brief

A joint UNDP/EU Project – Combating Trafficking in Women in the Republic of Belarus – implemented by the Ministry of Labour and Social Protection, has undertaken a comprehensive review of national legislation and provided recommendations to amend laws related to trafficking. In addition, it has developed an electronic database of Belarusian and European organizations providing assistance to trafficked women. It has helped set up a hotline offering free information to persons travelling abroad for employment purposes (more than 7,000 calls have been received) as well as a shelter for victims of trafficking (25 women). It has also produced an informative documentary about an 11-year-old trafficked Belarusian girl that has been distributed in more than 30 countries. One of the major challenges which the project attempted to tackle was to break down the “she is guilty” stereotype, as victims of trafficking are often treated as criminals. The project helped change the perception of law-enforcement authorities on this issue through seminars and meetings, and with the help of EU experts who shared best practices with their Belarusian colleagues.

Written by: Alina Ostling, UNDP Belarus

Advocacy for Gender-Sensitive Policies and Legal Reform in Albania

This case study appears in the Human Rights and Justice Brief

The Poverty Reduction Strategy Papers (PRSP)/ National Strategy for Social and Economic Development progress report in Serbia, produced in close cooperation with government counterparts, has incorporated a section on gender equality and included recommendations on gender mainstreaming for the first time. The UNDP project on Capacity-Building for Gender Mainstreaming, provided support to the national gender equality machinery and the Gender Institute at Tirana University by combining partnerships with European universities with practical experience in gender studies. In addition, the project supported the training of staff in ministries and provided assistance with the organization of a comprehensive public awareness campaign.

Written by: Entela Lako, UNDP Albania

Advocacy for Gender-Sensitive Policies and Legal Reform in Tajikistan

On the occasion of the 2006 International Women's Day, which was devoted to *Women in decision-making*, UNDP – in close partnership with other members of the expanded Gender Theme Group (UNIFEM, ABA/CEELI, German AgroAction, etc.) – organized an advocacy event aimed at promoting the role and status of women in Tajikistan's political life. The event brought together women leaders, such as deputy ministers, MPs and potential female political leaders from national educational institutions and youth NGOs. It allowed potential female leaders to learn more about the promotion of women, career development opportunities and national gender equality policy. It also provided a forum for continued consultations on the importance of girls' education and, in particular, discussed the usefulness of the existing quotas for rural girls to study at university.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Gender Training for Government Officials in Russia

This case study appears in the Governance and Participation brief

UNDP supported a project that aimed to develop and incorporate gender-specific training and follow-up programmes into the curriculum for government officials and professors of the Russian Academy of Public Service under the President of the Russian Federation. Baseline 'gender modules and clusters' were developed to be included in the training as well as manuals and methodological guidelines to disseminate Russian and international experiences in promoting gender equality. Training of trainers for government officials took place in more than 25 regions at branches of the Russian Academy of Public Services.

Written by: Galina Kalinaeva, UNDP Russia

Local Self-Government Elections in Armenia: Capacity-building Training for Women

This case study appears in the Governance and Participation brief

Low representation of women in political life in the countries of the South Caucasus, including Armenia, has led to the concern that the skills and potential of women are not being adequately utilized to address the region's social and economic problems. Moreover, experience shows that often women elected to local government still need continuous support to enhance their leadership, public administration, and governance skills to efficiently meet the responsibilities assigned to them.

UNDP Armenia's "Gender and Politics in Southern Caucasus" programme partnered with the UN Development Fund for Women (UNIFEM) and the Organization for Security and Cooperation in Europe (OSCE) to provide leadership and election preparation training and capacity-building for women

running for local elections. The training series was organized in Yerevan and ten regions of Armenia for potential women candidates and for women community leaders. The series was held one month before the start of local elections in 2005 to serve as an impetus for participation.

The two-day training programme covered 1) leadership and women's role in community mobilization and 2) local self-government elections; and was comprised of interactive discussions, working groups, and an effective combination of theory with practical work.

Trainees were introduced both to national and international instruments and mechanisms for promoting and protecting women's rights.

Results:

Out of the total number of trainees, 21 women ran in the local elections and 9 were elected: 2 as heads of community and 7 as city councillors. A number of trainees made up part of the campaign team of their selected candidates or joined election committees. Overall, the local self-government elections witnessed a percentage increase in the number of women elected when compared with 2002: Women heads of community made up 2.08 percent compared with 1.39 percent in 2002, and 293 women as community council members compared with 156 in 2002. Overall, a significant increase has been registered in the total number of women running for the position of community council member: 451 in 2005 compared with 277 in 2002.

Written by: Nune Harutyunyan, UNDP Armenia

Law Harmonization Process in Republika Srpska of Bosnia and Herzegovina

This case study appears in the Human Rights and Justice brief

The Gender Centre of the Republika Srpska carries out the activities pertaining to harmonization of laws, other regulations, and general acts with the Law on Gender Equality of BiH. An example is the Law on Professional Rehabilitation, Qualification, and Employment of Persons with Disabilities in Republika Srpska that has been amended to the Law on Gender Equality of Bosnia and Herzegovina. Harmonization with the gender equality law is specifically reflected in Article 4 on the elimination of gender and sexual orientation-based discrimination and Articles 38 and 55 on equal representation in management and decision making.

The Gender Centre is a part of the consultative processes on draft laws, other regulations, and general acts whereby governmental bodies submit copies of rough drafts or drafts to the Centre in order to obtain the opinion of its experts regarding harmonization of the proposed acts with the Law on Gender Equality of BiH. Entity Gender Centres and the Agency for Gender Equality of BiH are responsible for the monitoring and follow-up of the implementation of the Law on Gender Equality of BiH as well as for initiation and preparation of laws, regulations, and general acts leading to the attainment of gender equality and equity.

Written by: Klelija Balta and Armin Sirco, UNDP Bosnia and Herzegovina; Samra Filipovic Hadziabdic, Bosnia and Herzegovina Gender Agency; Spomenka Krunić, Gender Centre RS; Ana Vuković, Gender Centre Bosnia and Herzegovina

Poverty Reduction and Economic Development

Halting the Gap in Education between Boys and Girls in Tajikistan

This case study appears in the Education brief

Background information: As in many transition countries, women in Tajikistan carry the heaviest burden and responsibilities of transition, a burden further aggravated by the civil war, collapse of social services and safety nets, and labour migration. Lack of economic and sometimes physical security for young women has encouraged early marriage and the re-appearance of polygamy. There is growing evidence of a reversal of educational achievements from Soviet times.

Urgent action is needed to halt the growing gap between the educational achievement of boys and girls. One reason for the low number of women from remote regions of the country enrolled in higher education is the fact that universities and institutes are not in a position to provide accommodations for women to live and study in cities. In most cases, parents of young women fear for their daughters because of the lack of safe housing with basic utilities (water, heating, sanitation, etc.). To improve the access of women to higher education, UNDP—within its programme “Women in Development” (WID)—established a Learning Centre Dushanbe in 1998. The objective of the Centre was to organize and implement training on women’s mental and reproductive health, on human rights, and to promote women to leadership positions in politics, in the economy, and within their communities.

Today the Learning Centre is providing a scholarship programme for 150 young women from 38 remote, mountainous districts, each of whom receives a stipend and free accommodation in a refurbished hostel in Dushanbe. These students are studying in ten higher education institutions in various fields, including medicine, agriculture, foreign languages, and pedagogy. Former students are today working with local governments in their regions of origin and are teaching Russian, English, and computer classes in their local schools. Some have started local NGOs and community groups.

The Learning Centre is a unique experience in improving access for women from remote regions to higher education. Each year a growing number of young women apply to the Centre; and supplementary classes in Russian, English, computers, and leadership skills make it easier for them to adapt to the requirements of university curricula and help them broaden their horizons. The Learning Centre was handed over to the Ministry of Education in September 2003.

Written by: Farrukh Shoimardonov, UNDP Tajikistan

Mainstreaming Gender in Education in Bosnia and Herzegovina

This case study appears in the Education brief

In Bosnia and Herzegovina, a three-year project, “Gender mainstreaming in education and media” sought to change gender stereotypes and professional segregation at all levels of education, resulting in six seminars for some 500 directors and teachers from 208 elementary schools and 85 secondary schools.

Two very important results of the project are the publication of two collections, one related to the gender equality aspects of different disciplines, including religious education (Muslim, Orthodox Christian, and Catholic) and another which includes sets of concrete suggestions to educators on how to organize different classes, workshops, class events, or parental activities to discuss gender-based stereotypes and prejudices.

The approach to gender mainstreaming in education in Bosnia and Herzegovina is an excellent example of both comprehensive and in-depth approaches. It mobilizes all relevant stakeholders in the education process (children, educators, and parents), and it creates both the practical conditions for the realization of change (through curricula, training of educators, and provision of materials) as well as a favorable climate for that change to happen through the active inclusion of parents and children.

It should be mentioned that there are two important side-effects to such a comprehensive approach to gender mainstreaming in education for Bosnia and Herzegovina itself. This project brings together professionals across ethnic lines, thus contributing to the building of a more tolerant civil society and better acceptance of differences between people, including gender differences. Also, this project, with many concrete suggestions for educators, is introducing a fresh, modern, and student-centered methodology, which is a novelty in the education system of BiH. With topics such as health, love, friendship, family life, etc., this project is making strong connections between an education-for-life approach and a change of patriarchal values.

Written by: Marina Blagojevic, adapted from Zbornik gender pristupa u odgojno-obrazovnom procesu, Sarajevo: Ministarstvo za ljudska prava i izbeglice Bosne i Hercegovine, 2005

Equal Opportunities and Discrimination in the Moldovan Labour Market

This case study appears in the Labour brief

In compliance with the Constitution of the Republic of Moldova, all citizens of the country have equal rights regardless of sex. Within the project "Promotion of gender equality through legislation," supported by the United Nations Development Fund for Women (UNIFEM), a gender analysis of the legislation and a draft law on equal opportunities for men and women was developed.

Nevertheless, indirect gender discrimination in the labour market continues to be a problem. For example, about 70 percent of complaints received by the Labour Inspection Department in the last few years were from women, and many were about discrimination while seeking employment. This was reflected in the questions asked during interviews, such as: is the candidate married, how many children does she have, etc. Moreover, employers often requested submission of a medical certificate to prove that the applicant was not pregnant.

Why does it happen?

- Employers foresee bearing costs related to the reproductive function of women: existence of children who need care, possible additional sick-leave for childcare, maternity leave, etc.
- Legislation shortcomings: It is very difficult to prove the existence of discrimination in this regard given that it is not directly forbidden by law.

Gender Equality Actions

- The Republic of Moldova conducted a CEDAW-based gender analysis of legislation to identify gaps in existing laws.
- In February 2006, the law on equal opportunities for men and women was approved by parliament and a special article was included, stipulating the relationship between employer and employees.

Challenges

The next important step is the development of mechanisms and tools for the law's implementation. The ultimate goal of the government's policy should be the total elimination of gender discrimination.

Written by: Valentina Budrug-Lungu, Project Manager, UNIFEM, Gender Equality Legislation in Moldova (references: Osmochescu, Rotarciuc et al. (2004): Official Monitor of the Republic of Moldova (2006))

Women Entrepreneurship Support Initiatives in Turkey

A UNDP project in eastern and south-eastern Anatolia that focuses on rural development and tourism as generators of economic growth also aims to intensify capacity-building for urban and rural development in the region. The project is unique in that it supports pilot initiatives for villages and communities to determine their own development priorities and planning, and helps District Governors better define local priorities. In the capacity building efforts 5,000 people were trained and 30 percent of participants were women.

To date, the project has served to create 1,136 jobs. To address some of the impacts on women, UNDP designed and implemented support initiatives for women entrepreneurs. Approximately 150 women received intensive training on gender equality, business management, and communication through these programmes in south-eastern Anatolia.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Micro-credit Programme for Women in Rural Areas in Tajikistan

This case study appears in the Private Sector Development brief

Due to a high level of male labour migration, many families in rural areas are headed by women. Local customs make women's economic situation vulnerable and insecure. This is further exacerbated by their dependency on remittances from male out-migrants. By teaching women how to get a loan and to use it for various activities—such as livestock breeding, potato and wheat growing, horticulture, poultry farming, and small- and medium- sized enterprise development—it increases their independence and ability to maintain their families.

Through its Communities Programme, UNDP Tajikistan has supported more than 90 Jamoat Resource Centres (JRC) to help strengthen participatory and decentralized decision making at the local level and improve community development, transparency, and accountability. The JRC Revolving Fund (RF) was established with an idea to help impoverished communities lacking capital. They also serve

as a mechanism to manage small-scale project grants in a sustainable manner, since JRCs are able to prioritize community problems, compile community action plans, and design project proposals for fundraising and practice of monitoring and evaluation. JRCs are managed by a council of elected representatives from the village. Moreover, they have gender committees and women centres.

Until 2005 active female borrowers comprised of 27-33 percent of the total number of borrowers. In 2006, UNDP Tajikistan will increase loans for females to up to 50 percent of total borrowers.

Why is it important to use a gender perspective with micro-credit opportunities?

The majority of the Tajik population (well over 51 percent) are women. Moreover, 60-80 percent of the agricultural activities are carried out by women. Nonetheless, there are currently more male loan beneficiaries than female. The aim of UNDP, therefore, is to increase the number of female beneficiaries accordingly.

In addition, the number of labour migrants is increasing, leaving many women alone to look after their families. This creates an issue of 'women headed households.' For this reason, UNDP has come to understand that women in rural areas should be strongly encouraged to participate in UNDP loan disbursements.

What is the goal? Why gender targeted interventions?

First, the aim is to increase the status of women in society. For example, although men tend to receive the loans, in actuality women most often take the responsibility to lead the loan activity. Therefore, UNDP wants women to receive loans and, accordingly, be involved in the income-generation processes. Second, this is a very sensitive issue that concerns religion, culture, and tradition of the local population. In this respect, the objective is to intervene and change the behaviour of the local people, giving women more opportunities to build a better life and improve their status in society.

Written by: Farrukh Shoimardonov, UNDP Tajikistan

Gender Budgets in Russia

This case study appears in the Macroeconomics and Trade brief

This UNIFEM project aims to develop methods of gender budgeting in order to increase gender sensitivity of the government and to strengthen the decision-making role of women in Russia as participants in the budgeting process.

The project is being conducted during a period of full-scale reforms, which include fundamental changes in the budgetary-taxation relations of decentralization, including devolvement of competencies in the social sphere from the federal to regional level. Reforms in the social sphere in Russia have revealed an important problem: securing human rights for men and women throughout the whole territory of the Russian Federation (RF). Thus, supervision and control of budgetary flows to the regions and to different population groups by civil society, and permanent analysis and monitoring through gender budgeting methods, were considered as effective mechanisms for upholding human rights, including women's rights, for the whole territory of Russia.

The project attracted high-level experts in budgeting and gender for the development of the methodology of gender budgeting in Russia. It also allowed for meaningful cooperation among an array of partners: representatives of the executive and legislative power authorities, civil society, mass media, and the experts.

Since the start of the project in 2004 the following key results have been achieved:

A methodology of gender budgeting at the federal and regional levels was elaborated, taking into account the changes made to the Budgetary Code in the context of decentralization.

For the first time in Russia, gender analysis of federal and regional (Komi Republic) budgets, and gender analysis of the set of laws influencing budgetary policy decisions, were conducted together. These laws include: the law on 'Minimum wage rate'; the law on 'State allowances to citizens having children'; and the law on 'Budget of the Federal Fund for compulsory medical insurance.'

In addition, a large number of recommendations were submitted for consideration to the Government of the Russian Federation, and several amendments were approved at the local and regional level.

These recommendations represent the redistribution of approximately 50,000 million roubles (USD 1.8 billion) in the Federal budget to cover the expenditures of gender responsive measures, including measures for increasing the minimum wage rate; increasing the wage rate in the social sectors (health, education, culture), where women are in the majority; increasing allowances for children; and increasing the tax exemptions of families with children, among others.

Written by: UNIFEM CIS

Women's Rights to Land in Tajikistan

This case study appears in the Private Sector Development brief

In Tajikistan, "Women's Rights to Land"—a project of the United Nations Development Fund for Women (UNIFEM)—resulted in the acceptance by parliament in February 2004 of four amendments to the Land Code. The amendments mainly relate to women's rights and access to land resources. The following changes were introduced:

Article 71: Amended article states that each family has a right to receive an allotment. The amendment allows for greater ease in establishing the order of property rights and management. Previously, each farmstead got an allotment, but in reality one farmstead was shared between several families. It was nearly impossible to track and manage the rights of property and/or right of possession.

Article 17, clause A: Amended article states that all members of a family, including women, will receive a Land Use Certificate (LUC) in addition to the General LUC that is given to a head of the family, and the settled land share of the family will be vested to women and girls of each certain family. Previously, if a head of a family received the LUC, neither women nor their children received documents certifying their rights for land shares within the family.

Articles 67-69 were excluded from the amended Land Code. These articles stated that former collective land should be distributed among permanent and full members of kolkhozes. Women who were on maternity leave or were not members of a certain kolkhoz were excluded from the land distribution process.

Article 66 was edited to substitute Articles 67-69, and its new version states that all citizens of the republic have equal rights to their land shares.

Written by: UNIFEM CIS

Mainstreaming gender in the Poverty Reduction Strategy for Serbia

This case study appears in the Poverty brief

Through the participatory process of drafting the 2003 Serbian Poverty Reduction Strategies (PRS), UNDP learned much about gender equality issues. Specifically, UNDP established a Civil Society Advisory Committee (CSAC) consisting of nine non-governmental organizations (NGOs), which took part in the drafting. One women's rights/gender equality NGO was included in the CSAC. During the two consultation rounds, comments were gathered from approximately 250 community service organizations through emails, roundtables, and focus groups. The CSAC members who were in charge of gender equality issues maintained regular contact with a network of women's organizations. Although suggested by CSAC and strongly advocated by the gender expert on the government expert team, gender was not mainstreamed throughout the whole document. Instead, gender equality issues were tackled through a separate brief on gender equality and female poverty.

However, both government experts and civil society organizations regarded the process as mutually beneficial. Partly satisfied with the level of inclusion of gender issues in the PRSP, but determined to continue their engagement to monitor PRSP implementation in order to ensure that gender issues are not neglected in relevant sectors, a group of four NGOs was maintained after the end of the consultation process. The meetings and discussions prior to agreeing on PRSP comments created the opportunity for the exchange of information and knowledge in relation to gender equality themes. As one CSAC member said, *"I did not know that there are so many aspects of poverty of women that are different than poverty among men. I always thought that if I want to demonstrate respect for gender equality I should not point out that they are different."*

Thus, in addition to the work in the PRSP process, this cooperation opened a new dimension of knowledge cross-fertilization. One unexpected benefit was that gender will be mainstreamed throughout the work of several NGOs, and NGOs dealing specifically with gender equality and women's rights will be better informed on the specific issues of other vulnerable groups.

Written by: Vesna Ciprus, UNDP Serbia

Harmonizing Indicators in the Millennium Development Goals in Kyrgyzstan

This case study appears in the Poverty brief

By harmonizing development indicators of several development frameworks, Kyrgyzstan has demonstrated its political will to implement international commitments to women's human rights.

The existence of the commitment to several international frameworks, such as the Millennium Development Goals, CEDAW, and the Beijing Platform for Action (BPFA), presented an opportunity for the country to create synergies between the commitments made and its national mid-term strategies. UNIFEM initiated and facilitated the process of harmonizing platforms and policies in an effort to minimize duplication of work and resources during the various stages of implementation, monitoring, and reporting on gender equality and women's human rights.

As part of this initiative, development indicators on gender equality and women's rights under CEDAW, BPFA, and several national strategies were harmonized in the context of the MDGs. This harmonized set of indicators became the platform for mainstreaming gender into national plans and socio-economic programmes. Thus, it served as a basis for engendering the Second MDG Country Report; preparation of the Statistical Book on MDGs, with indicators disaggregated by sex; preparation of gender assessments (called gender booklets) of selected line ministries and governmental agencies; and finally, factual material on "Gender and the MDGs." It was also agreed with the National Statistics Committee to use the set of harmonized indicators for the preparation of the yearly statistical book in the context of the MDGs.

Moreover, with the mutual efforts of UNIFEM and UNDP and with the support of the Government of the Kyrgyz Republic, a number of gender experts have been included in the core government group that is developing the country's second PRSP. The main aim of the gender experts is to make the policy and action matrix of this mid-term strategy gender sensitive using the set of harmonized gender-sensitive development indicators.

Some of the products developed on the basis of this harmonized set of indicators can be seen at the web page <http://db.un.org.kg>, which was also developed within the framework of the UNDP global project "Gender and the MDGs."

Written by: UNIFEM CIS

Gender and National MDGs in Tajikistan

In 2004-2005 the Government of Tajikistan, with the support of the UNDP/MDG Project, undertook an MDG needs assessment. Gender equality was targeted by a separate sectoral working group which analysed the current situation and developed a set of recommendations with financial estimates for their implementation. This needs assessment provided the basis for the development of the National Development Strategy for 2005-2015 and the Second Poverty Reduction Strategy for 2006-2010, currently being drafted by the government.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Gender and National MDGs in Albania

UNDP support to the national MDG report has led to the identification of gender mainstreaming as one of the four principles of the government's approach to the MDGs. Each MDG regional report and regional development strategy highlights gender inequality as one of the key obstacles to the country's development and includes specific measures to increase women's representation in decision-making bodies, empower women to participate in economic development and reduce school dropout rates for girls, especially in rural areas. Women's organizations took an active part in the formulation of the local goals and development priorities.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Men against Domestic Violence in Armenia

This case study appears in the Health brief

Mass media is one of the most effective tools used to raise public awareness on domestic violence and to carry out information campaigns in support of women's rights. Taking into account its crucial role in information exchange and dissemination, the UNDP Gender and Politics project incorporated a mass media component into a "Men Against Domestic Violence" project implemented by two local NGOs. The media component targeted journalists and reporters from local TV, radio, and newspapers for special training aimed at empowering media representatives with the necessary skills and knowledge to promote public debates on domestic violence. The trainings included: the role of mass media in unveiling the problem of domestic violence in society and proper reporting ethics to be used while interviewing victims of domestic violence and writing articles; and preparation of a TV talk show series on domestic violence as a follow-up to the training.

The training clearly demonstrated that the target group had a rather vague understanding of the domestic violence phenomenon and various forms of family violence, and that they significantly underestimated the degree of such violence in their local communities.

As a follow-up to the training, the Armenian Public Relations Association, one of two NGOs implementing the project, prepared (with the support of the Gender and Politics programme) a series of talk shows on domestic violence, which were aired on a local television channel. The talk show focused on the roles of Armenian state authorities, international organizations, Republic of Armenia (RA) police, judicial and law enforcement bodies as well as social workers and local NGOs in the prevention, handling of, and reporting on domestic violence issues. Participants included representatives from RA Ministry of Labour and Social Issues, heads of social services agencies, RA Police, NGOs, and experts dealing with women's issues. The talk shows turned into hot TV debates that showed several tendencies: a growing interest in issues of domestic violence among state officials and civil society, an emerging need to identify certain mechanisms for domestic violence studies and preventive measures; and a need for stronger cooperation between the state and international organizations in the field of domestic violence prevention and reduction.

One of the most important outcomes of the debates was the establishment of active cooperation between the RA Police and the UNDP Gender and Politics project. Currently, the project is elaborating a strategy on strengthening RA Police information units in terms of collection of data and its disaggregation. Specifically, the strategy is targeting the creation of a statistical database on domestic violence cases, which will assist in arriving at a clear picture of domestic violence in Armenia. This, in turn, will help to identify appropriate measures for the reduction of domestic violence, and will facilitate the work of police officers and social workers who must deal with such cases on a daily basis.

Written by: Nune Harutyunyan, UNDP Armenia

Crises Prevention and Recovery

Kosovo Protection Corps - Mainstreaming UN Resolution 1325

This case study appears in the Crisis Prevention and Recovery brief

Gender mainstreaming within the KPC: Increasing the number of women working in the agency and supporting them to reach higher positions in the organization.

In its daily work, the Kosovo Protection Corps (KPC), a civilian agency that provides emergency response and reconstruction services, often faces problems related to gender, such as domestic violence and trafficking in women. Referring to Resolution 1325, the KPC Board on Gender Equality has the responsibility to oversee gender mainstreaming within the work of the Corps and to provide gender training to KPC members. The UN Development Fund for Women (UNIFEM) is supporting the Board in institutionalizing and strengthening its work, specifically focusing on providing the Board and high-level officers with training workshops on gender equality and gender mainstreaming, and with the production of training materials.

In the long-run the work will result in changed gender structures and, thus, a more democratic society by improving of the status of women and working to reduce domestic violence and trafficking in women.

Written by: Ms. Flora Macula, UNIFEM Kosovo

Women Leadership in Preventive Development Programme in Kyrgyzstan

This case study appears in the Crisis Prevention and Recovery brief

UNDP Preventive Development Programme in Kyrgyzstan aims to alleviate instability in the Fergana Valley by enhancing community participation. The programme's focus is on reducing conflict that may be triggered by cross-border tension with neighbouring countries, ethnic-based politics, and the struggle for scarce resources through small-scale infrastructure improvements and social welfare schemes at the community level. Women make up a large part of the membership of the community-based organizations with which UNDP collaborates. Women are leading two projects out of fifteen implemented under this programme.

Rabia Kazybekova is in charge of a project under which a Sunday School for Ethnic Minorities is being built in the district of Karasu. She is responsible for the social welfare sector. She has mobilized an additional 800,000 soms (monetary unit in Kyrgyzstan; 100 soms equals US\$2.6) from the government for repairs of, and furniture for, the Sunday School.

Hadicha Jumabaeva took the lead in constructing a secondary school for cross-border children in an isolated area in the district of Aravan. At present, she is in charge of the social sector in the municipality of Toomoyun. She is involved in so-called targeted social assistance that aims to register and support vulnerable people.

The projects have also succeeded in conducting a survey and carrying out awareness-raising campaigns on gender aspects of conflict prevention by producing videos and organizing seminars, trainings and focus-group discussions.

Written by: Ms. Anastasia Divinskaya, UNDP Kyrgyzstan

Women's capacity as partners in the disarmament effort in Albania

The Small Arms and Light Weapons Control project (SALWC) of the UN launched in 2002 in Albania developed a unique approach to voluntary civilian disarmament, combining weapons surrender with community-based development incentives supported by a comprehensive public awareness strategy. Within its frames, UNIFEM and UNDP implemented a comprehensive strategy to develop women's capacity as partners in the disarmament effort. A comparative survey of project and non-project areas showed that when women were beneficiaries of public awareness campaigns, weapons collection projects were more successful. The police, in particular, remarked on the support they gained from women in the project areas.

Some of the results of the awareness raising work were as follows:

- After training, women became more outspoken in convincing their family members to hand in weapons. Women felt empowered by their greater participation in a debate from which they were historically excluded. Men acknowledged the importance of women encouraging them to disarm.
- Women's relationships with the local security authorities were strengthened: they reported increased trust in the police and felt more able to appeal to them for help with problems.
- Public views on disarmament became more comprehensive: according to interviewees of the survey disarmament is now considered not only a measure to reduce criminality, but also an important influence on political, social and economical stability.

Written by: Vanessa Farr, Security expert (for references see Crisis Prevention and Recovery brief)

HIV and AIDS

Campaign Featuring Sport and Music Stars Against AIDS in Belarus

Two major events organized by UNDP – the Campaign Featuring Sport and Music Stars Against AIDS – specifically mentioned women as the group most vulnerable to the epidemic and focused on the inclusion of women/girls in HIV prevention and treatment. New National HIV/AIDS Prevention Programmes for Penitentiaries will also take into account the gender dimensions of HIV/AIDS by providing equal services to men and women in prisons, ARV treatment and access to voluntary testing and counselling. A UNDP-supported photo exhibition, entitled “Door”, was organized by the NGO Positive Movement. Focused on the life story of a girl who was infected with AIDS, it has been shown in three cities in Belarus as well as in Vilnius, Moscow, Riga, and three Ukrainian cities – Kiev, Lviv and Odessa. More than 20,000 people have visited the exhibition and were influenced by the life story of an HIV-positive girl.

Source: UNDP Good Practices in Gender Mainstreaming 2006

Women’s Leadership in Promoting Greater Involvement of PWHAs

This case study appears in the HIV and AIDS brief

Stigma and discrimination against PWHAs (persons living with HIV/AIDS) among health care professionals have been one of the major obstacles in the Balkans for access to treatment and care services. Foundation Partnerships in Health (FPH), a woman-led regional NGO, has been promoting greater health-care for PWHAs by strengthening partnerships between infectious diseases specialists in hospitals, clinics, NGOs, and ministries of health in the five Balkan countries and in the UN Mission in Kosovo. FPH organized the first regional HIV and AIDS conference in October 2005 in Skopje, Macedonia, and featured a PWA woman as the key-note speaker. In addition, both male and female PWHAs from countries in the region were invited to participate in the conference.

As a result of this initiative, PWHAs are developing a regional network among themselves to advocate their right of access to treatment. One PWA was a woman dentist who was infected during her work. She is now collaborating with her Ministry of Health to develop guidelines for dentist workplace safety and HIV prevention. FPH also engaged PWHAs as resource people in national clinical training of primary care doctors and nurses in Bosnia and Herzegovina, Macedonia, Montenegro, and Albania. This training was the first time most primary health-care providers in these countries ever met and had an open discussion with PWHAs about stigma and discriminations and the special needs of male and female PWHAs in treatment, care, and support. Feedback from these trained primary health-care providers and post-training evaluations showed increased sensitivity of these providers and improved willingness to deal with PWHAs. In addition, the FPH efforts have encouraged the governments in the region to solicit inputs from PWHAs in their programme planning and policy formulation.

Written by: Lee-Nah Hsu, HIV and AIDS expert

HIV Programmes Addressing Gender Concerns in Kyrgyzstan

This case study appears in the HIV and AIDS brief

Needle and syringe exchange programme in Osh, Kyrgyzstan: UNDP Kyrgyzstan is supporting a national, comprehensive, multi-sectoral HIV prevention and AIDS care and support programme. It covers a strengthened legal framework, rights protection, and the engagement of multiple sectors, including justice, defence, the uniformed services, social welfare, and education, in addition to the health sector. In this context, an enabling legal environment allows community outreach for needle and syringe exchange that is attached to the district hospital. The outreach workers were recruited from both young male and female ex-drug users. The program has ensured not only outreach to both male and female drug users, but it also deals with specific issues of each group. For example, when a female outreach worker encounters a male drug user, there may be male-specific issues that she is not in a position to discuss because of the cultural context relating to assigned gender roles. She could then refer her male outreach team member, and vice versa.

Prison outreach in Bishkek, Kyrgyzstan: The authorization of harm-reduction activities run by an NGO aimed at fostering self-help among drug users has been extended to penal facilities in collaboration with prison authorities. With the availability of both male and female outreach counselors for prison inmates, it has become possible to reach both male and female inmates and to deal with drug use, sexual behavior, and gender related issues.

The gender-balanced approach of the UNDP programme facilitated the outreach to wider drug use and prison populations as well as allowed a more effective harm-reduction effort. The number of new HIV infections for both men and women in Osh and in the intervention prisons has stabilized following the introduction of these interventions. In addition, there are more referrals for drug rehabilitations and for discharged inmates to enter therapeutic communities.

Written by: Ms. Lee-Nah Hsu, HIV and AIDS expert

Energy and Environment

Clean Energy in Rural Communities in Karakalpakstan

This case study appears in Energy and Environment brief

This pilot project is intended to demonstrate the potential for using renewable energy systems to provide small amounts of electricity to encourage sustainable development. Fifteen solar home systems (SHS) were installed in November 2003 in Kostruba, Karakalpakstan (Autonomous Republic in Uzbekistan). The SHS were intended to provide households with lighting, radio, and television. After installation of the systems, 25 people were trained in their operation and maintenance.

The electricity that these SHS projects will provide is likely to improve the lives of women and children, allowing them to have better household lighting. This reduces the negative health effects from burning wood and diesel, and reduces the chance of accidental fire. However, better lighting also allows a longer working day, which may further reduce a woman's leisure time.

The project planners did not perform gender disaggregated energy analysis before they made decisions about the project, despite the fact that it has been well established in the literature that it is crucial to perform such analysis when working with domestic energy. The project designers assumed that the project automatically would be equally beneficial for men and women. As a result of this thinking, women were not consulted in advance as to their views on how best to prioritize their energy needs.

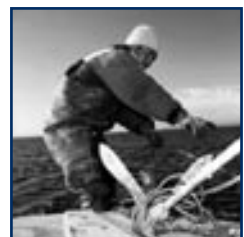
Findings:

- Women are the main domestic energy users; women and children spend the longest time inside the home and will be the main users of the SHS;
- Women carry the burden of everyday fuel collection for their domestic cooking and heating needs. Even the limited supply of electricity that these SHS would provide could make a dramatic difference in their daily schedule;
- Currently only the male population in Kostruba are aware of the project's objectives; only men participated in discussions about project implementation; and only men were targeted for training and instruction about the SHS systems.

The level of male domination seen in Kostruba complicates project implementation. If these projects are successfully implemented, targeting both women and men, they may slowly encourage awareness-raising about women's rights in general and empowerment of village women in particular.

Source: Based on a report by a consultant for the Bureau for Development Policy, UNDP

GENDER MAINSTREAMING IN PRACTICE A TOOLKIT



PART II: Sectoral Briefs

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Introduction

This introduction is intended to explain how best to use the Gender Briefs in Part II of this toolkit.

The Gender Briefs are designed to highlight the main issues and links between gender and a specific policy area. They do not attempt to be comprehensive, but give sufficient insight into the main issues. They also contain case studies and illustrations of gender mainstreaming.

Which Gender Briefs should I read?

- Read those Briefs that fall within your professional area of focus.
- You may wish to read other Briefs to identify links between sectors so you can cooperate with other professionals in different sectors to promote gender equality. This 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.

What is the Geographic focus of the Gender Briefs?

The Gender Briefs contain illustrations mostly specific to the Europe and CIS region. At the same time, they also can be applied to global gender issues. Thus the Gender Briefs should be of interest to a wider audience.

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 have distinct gender implications.

Each sub-issue discussed in the Gender Briefs is divided into sections that provide different types of information. The sections are as follows:

What is the Issue? What is the Goal?

The issues: This section describes the main trends in a particular policy area, and highlights how and why they are in fact “gender issues.”

The goals: This section summarizes the main goal or goals. While many types of goals exist, attention is focused on policy goals: i.e. what policy makers should be striving to achieve. When other goals or objectives are noted, they are explained.

Why Bother?

This section explains why policy makers should adopt a gender mainstreaming approach towards a particular issue. For a more detailed description of these arguments, and for tips on how and when to use them, see PART I of this handbook: “Arguing your Case: Gender Matters!”

Possible Interventions and Entry Points

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

Measuring Progress

This section offers indicators that can be used to measure progress towards specific policy goals. In general, three types of indicators are suggested: checklist indicators, statistics-based indicators, and indicators requiring specific forms of data collection.

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

References

A list of references follows each brief to help guide further research.



Poverty

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Poverty

Addressing and combating poverty is a concern for multiple sectors and needs to be integrated into several programmes and policies. At the same time, it is important to examine poverty as an issue in its own right, particularly in regard to the conceptual and methodological frameworks that guide the development and implementation of poverty alleviation initiatives. This Gender Brief intends to provide an introduction to poverty and gender but does not cover all of the issues or different contexts in which the relation between poverty and gender may exist. Therefore, it looks at the links between poverty and gender in general, discusses the dimensions of the problem, and looks at it in the context of poverty reduction initiatives.

I. Defining the Relationships between Poverty and Gender

What is the Issue? What is the Goal?

The way poverty is understood often determines the role that gender plays in poverty alleviation programmes and strategies. A very narrow understanding of poverty will not reveal the complex interplay of different factors that cause gender inequality. Thus, the gendered nature of poverty may not be adequately addressed at the policy level. If being poor means lack of income and restrictions in consumption of goods and services (“consumption and income poverty”), then gender analysis of poverty will be limited to comparisons of income levels. Other aspects related to gender and poverty will be neglected, especially in the context of responsibilities and capabilities in consumption patterns.¹

Men and women tend to experience poverty differently: Their poverty is likely to be caused by different factors, they will adopt different coping strategies, and the social and economic impact upon them will vary. In addition, the processes by which men and women enter and exit poverty are not the same. Clearly, poverty is a gendered phenomenon and as such it will be better explained if seen from a broader perspective.

While the basic definition of poverty is static, broader definitions describe poverty as a *process*—a complex interaction of a wide range of factors. They focus on the *reasons* for being poor and not simply on the consequences. Indeed, understanding the paths into and out of poverty leads to better formulated poverty reduction policies.

From a human poverty perspective, poverty stands for the denial of opportunities and choices (or “capabilities”) for living a basic or “tolerable” life,² and it includes not only the symptoms but also causes of poverty. The gender dimension adds significantly to the concept of poverty, incorporating issues such as poverty of decision-making power, poverty of time, and poverty of means of self-determination.

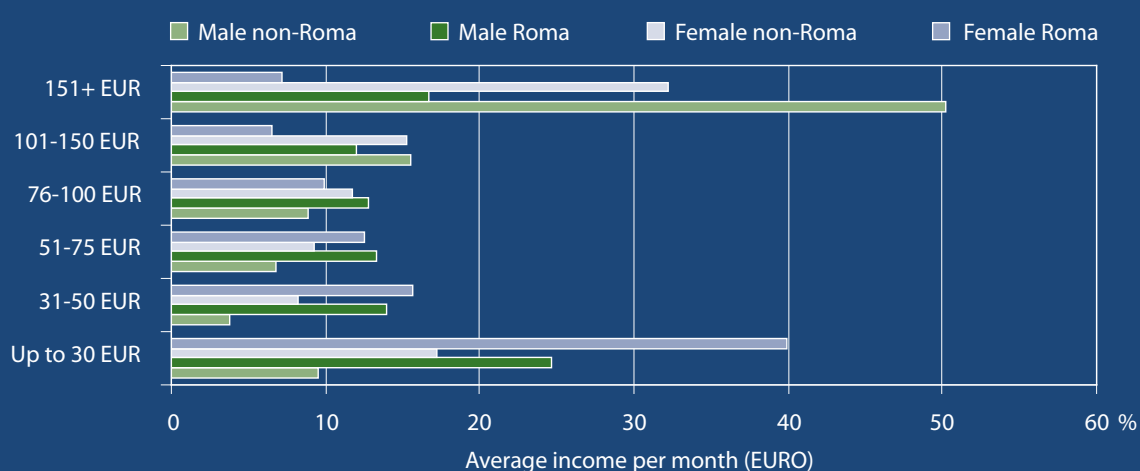
¹Chant (2006).

²Çağatay, Nilufer (1998) The seminal work by Amartya Sen is also important.

Another concept relating to poverty is that of social exclusion. Social exclusion refers to the structural obstacles and institutional arrangements that deny some individuals, families and groups access to resources associated with citizenship on the basis of gender, age, ethnicity, etc.

BOX: Gender and Ethnic Differences: A Gate to Social Exclusion?

In the context of income poverty, women in South-East Europe are overall poorer than men. However, certain disadvantaged groups experience this difference even more significantly. Data from a regional household survey on Roma and non-Roma from the eight countries of South-East Europe and the province of Kosovo reveal that non-Roma women earn 69 percent of the non-Roma men's average income and Roma women earn 58 percent of Roma men's average monthly income. Roma women are by far the poorest members of the overall population, and almost 40 percent of them have an income of less than 30 EUR per month. In contrast, 50 percent of non-Roma males have an income higher than 151 EUR per month.



These income differences can be caused by a gender-based lack of access to good education, barriers to the labour market, lower wages, or unpaid work in home activities. The differences in income are reflected in poverty status: Women are more dependent on the head of household and other family members. Clearly, Roma women are even more vulnerable because they face double barriers: They are likely to be excluded for being part of an ethnic minority and additionally suffer for being women.³

Acknowledgement to: Susanne Milcher, UNDP Regional Centre for Europe and the CIS.

While poverty affects households or communities as a whole, and both men and women bear the burden of it, women's poverty tends to be more severe than men's. Furthermore, because of the gender role in households, and consequently women's responsibilities for reproductive work, women's poverty brings additional costs to society by affecting children and the elderly: The more women are living in deprivation, the more the children and elderly in their care are likely to be at risk.⁴ This has long-term consequences for social mobility and the stratification of society. Similarly, when women are poor, the elderly experience higher poverty rates, and this might have some implications for political decision-making: e.g., retirement age might be changed or the amount of pensions and other benefits reconsidered.

³ While 53 percent of non-Roma women have wage employment as their main source of income, only 19 percent of Roma women receive their main income from this source. Roma women are much more reliant on benefits, which include pensions, child and maternity benefits as well as social transfers and unemployment benefits.

⁴ See for example: UNICEF (2000).

The impact of transition on poverty and its gender consequences

The gendered nature of poverty has become very visible in transition countries. While the process of political, economic, and social transformation has affected both men and women, women have had to bear the largest share of the burden.

Many factors determined this outcome:

Price deregulation as part of economic reforms (stabilization programmes) and public sector re-trenchment on basic goods and services, which were previously free or subsidized, has been more of a problem for women as they tend to be the main household budget holders. Inflation and state cuts in funding of social programmes present great difficulty for mothers in their care for children, especially at a time of increased job insecurity. Moreover, poor financial conditions can affect girl and boy children differently within families (see box, below), which is another gendered aspect of poverty.

BOX: Poverty and investment in education ⁵

In a recent World Bank study, it was found that the main source of gender inequality in post-war Bosnia and Herzegovina seems to come from differences in investments in girls' and boys' education, and that inequality increases with the decline in family income level. A strong correlation was found among the patterns of labour-force participation, gender gap in earnings, the financial ability to fund individual education, and school attendance.

Furthermore, the magnitude of the impact of economic development on gender differences in this context will depend on where economic growth is concentrated. If the poor capture at least some benefits of economic growth, the gender differences in household investment in human capital of their children will decline. If, on the other hand, growth is concentrated among the richest, then important gender disparities could remain pervasive.

Transition has also brought high unemployment to the region, resulting from privatization and market and trade liberalization that led to businesses being closed due to increased competition. These changes also exacerbated income inequality within countries, which together with weak institutions, weak civil society, and weak rule of law had a wider negative impact on society. Given the role that women play in family security, lack of opportunities and unemployment for women were reflected more strongly in poverty data. This is even more so when ethnic differences were taken into account.

Link: See briefs on Labour and Macroeconomics and Trade

The incidence of poverty has in part been related to the presence of occupational segregation.

Occupational segregation between men and women was inherited from the past, together with the lack of good governance; but it became more pronounced during the implementation of the transition reforms, leading to changes in labour market outcomes across countries.

Link: See briefs on Labour and Governance.

The issue of occupational segregation in the CIS is also closely connected to the increase of informal work, which is a common feature of transition economies. Again, there is a link here to social exclu-

⁵ World Bank (2003a).

sion and poverty. Even though men and women are equally present in the informal sector, studies show that the nature of their employment may be different. In this sector, hierarchical division is very clear: Almost 70 percent of senior positions belong to men while more than 70 percent of low-level jobs are held by women. Therefore, women as the least paid and the most vulnerable category of workers in this sector are largely subject to exploitation, including sexual exploitation. These women are to some extent socially excluded: They are not included in governmental programmes and they are not protected either by their employers or the state (i.e., labour laws or social policy). The consequence of transition in this respect is that women suffer doubly—first, on account of gender inequality (occupational segregation) and, second, due to lack of protection in the large informal sector. Together, this leads to an increase in female poverty.

Some of the above factors explaining the appearance and patterns of poverty in the region might also be useful to explain another possible result of transition regarding poverty: migration within and outside the countries. These factors make illegal migrants very vulnerable to labour exploitation. While migration on its own can be positive to reduce unemployment and might lead to poverty relief for those who receive remittances, it also entails certain costs to countries. The loss of human capital and the higher vulnerability of traditional families due to the absence of a breadwinner risk leaving women more vulnerable to exploitation in a context of limited economic opportunities.⁶

BOX: Links Between Poverty and Trafficking in Human Beings⁷

In contemporary literature, poverty is considered one of the root causes of trafficking in human beings, and women are identified as one of the main groups at risk of being trafficked. One article about the Balkans notes that: “Women particularly have fewer choices and are disproportionately excluded from access to economic resources; and the increase in trafficking in women and children is directly linked to the feminization of poverty as a result of the transition process.”⁸

A report supported by the United Nations Development Fund for Women (UNIFEM) on the economic and social roots of trafficking points out that: “Based on the information of cases assisted in the shelter of Tirana and of Vlora, the victims are originally from different types of families: 1) poor, 2) very poor, 3) normal families (average living standards), and 4) well-off families. Most victims come from poor families. However, it is important to bear in mind the victims’ perception of poverty, since these data are mainly self-reported. For example: a victim coming from a rural area of Tropoje (North of Albania) doesn’t identify herself and her family as poor, as long as she has something to eat on the table.”⁹

The challenges that women face in the transition process are often not adequately considered in economic analysis and planning. Moreover, even though gender equality and empowerment of women is one of the Millennium Development Goals (MDGs), the gender aspect of poverty is not always present in the documents that set development frameworks or policy at the country level. One of the policy documents that provides an analysis of primary poverty issues and gives strategic guidance for social and economic development is the poverty reduction strategy paper (PRSP).¹⁰ The paper is prepared jointly by the World Bank, IMF, and national governments to encourage growth and reduce poverty. It has three strategic directions: dynamic development and economic growth; prevention of new poverty; and efficient implementation of existing pro-

⁶ Gender Alliance for Development Centre, (2006)

⁷ Ibid.

⁸ UNICEF (2000)

⁹ Gender Alliance for Development Centre (2006)

¹⁰ The names of these strategies vary within the region of Eastern and Southern Europe and the CIS. Largely they are Economic and Social Development strategies with a focus on poverty reduction.

grammes and creation of new ones that target the most vulnerable groups. This is where the gender dimension of poverty is tackled as one of the key poverty reduction themes. In most strategies, gender is only briefly covered and only few women's issues are mentioned. What PRSPs should address is a gender development approach whereby inequalities are analysed and a policy is created to eliminate them.¹¹

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

- To ensure the integration of a **gender perspective** into the way in which poverty is understood and addressed in a policy context.
- To ensure that **gender is mainstreamed** into development approaches, policy instruments, and follow-through actions that aim to reduce poverty.
- To ensure the availability of reliable data sufficiently disaggregated by sex and sensitized to gender.

CASE STUDY: UNDP Support for Mainstreaming Gender in Civil Society Discussions and Input to the Poverty Reduction Strategy for Serbia

Through the participatory process of drafting the 2003 Serbian Poverty Reduction Strategies (PRS), UNDP learned much about gender equality issues. Specifically, UNDP established a Civil Society Advisory Committee (CSAC) consisting of nine non-governmental organizations (NGOs), which took part in the drafting. One women's rights/gender equality NGO was included in the CSAC. During the two consultation rounds, comments were gathered from approximately 250 community service organizations through emails, roundtables, and focus groups. The CSAC members who were in charge of gender equality issues maintained regular contact with a network of women's organizations. Although suggested by CSAC and strongly advocated by the gender expert on the government expert team, gender was not mainstreamed throughout the whole document. Instead, gender equality issues were tackled through a separate chapter on gender equality and female poverty.

However, both government experts and civil society organizations regarded the process as mutually beneficial. Partly satisfied with the level of inclusion of gender issues in the PRSP, but determined to continue their engagement to monitor PRSP implementation in order to ensure that gender issues are not neglected in relevant sectors, a group of four NGOs was maintained after the end of the consultation process.

The meetings and discussions prior to agreeing on PRSP comments created the opportunity for the exchange of information and knowledge in relation to gender equality themes. As one CSAC member said, *"I did not know that there are so many aspects of poverty of women that are different than poverty among men. I always thought that if I want to demonstrate respect for gender equality I should not point out that they are different."*

Thus, in addition to the work on the PRSP process, this cooperation opened a new dimension of knowledge cross-fertilization. One unexpected benefit was that gender will be mainstreamed throughout the work of several NGOs, and NGOs dealing specifically with gender equality and women's rights will be better informed on the specific issues of other vulnerable groups.

Acknowledgement to: Vesna Ciprus, UNDP Serbia

¹¹ For more information see Gender Action (web)

Why Bother?

Justice: “UNDP promotes the concept of human poverty as a complement to income poverty, emphasizing that equity, social inclusion, women’s empowerment, and respect for human rights matter for poverty reduction.”¹²

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.”¹³ In other words, gender inequality 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 families and communities 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 analysis sheds light on issues such as power and redistribution within households, on cultural and societal barriers to autonomy, access to a series of basic goods and services, and on access to decision-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.¹⁴ 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. Poverty must be put on the gender equality agenda in order to obtain better outcomes in attaining the goals therein. The links between gender and poverty are complex and should be understood as much as possible in specific country contexts to enhance the efforts of both reducing poverty and enhancing gender equality.

Possible Interventions and Entry Points

- ✓ **Literature review:** Neither gender equality nor poverty are simple policy issues. Luckily, many detailed studies have been carried out that analyze their interface. An important first step for policy makers involved with poverty issues might be to conduct an extensive literature review.
- ✓ **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:

¹² UNDP (web)

¹³ Çağatay, Nilufer (1998) pg. 11.

¹⁴ Çağatay, Nilufer (1998) pg. 11.

Addressing Resistance to Gender Mainstreaming in Poverty Reduction Strategies or Other Related Policy Documents ¹⁵	
Issues That May Arise	Points for Discussion/Response
"But the issue here is poverty, not gender equality."	<p>Note studies on gender and poverty that show:</p> <ul style="list-style-type: none"> • a large proportion of the poor are women; • discrimination against women means that women face different barriers in coping with and overcoming poverty; • men and women have different coping strategies. <p>In this context, would a concept of poverty that did not pay close attention to gender have any validity?</p>
"Gender is not the only variable to be considered."	<p>We know that gender is an important variable, given the background information. Concepts of poverty that ignore gender would probably be incomplete and misleading.</p> <p>Depending on the particular country, other factors such as race, ethnicity, religion, marital status, and 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!</p>
"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?"	<p>If gender differences and inequalities are not explicitly addressed in concept documents or papers, what is the chance that it will be addressed in concrete programmes and activities?</p>

- ✓ **Influencing the PRSP process or other national strategy development processes:** The position that UNDP has in working together with international financial institutions at the country level can bring the importance of engendering these policy documents and their implementation to the fore. Several countries in the region have included gender into their PRSPs.¹⁶ The World Bank has also been revising their gender strategy to better suit this process; and NGOs such as Oxfam also engage in monitoring gender in PRSPs.¹⁷

BOX: OECD/DAC Recommendations¹⁸

Nine Steps for Integrating Gender into the PRS Processes:

1. Ensuring that gender is addressed across the four dimensions of poverty (opportunities, capabilities, security, empowerment).
2. Documenting the experience of poverty for both men and women for all four dimensions.
3. Conducting gender analysis of the data and integrating findings into poverty diagnoses.
4. Defining the policy implications of gender analysis in the country.
5. Identifying gender-responsive priorities for the PRS.
6. Integrating gender-responsive priorities in policy responses and priority actions in the PRS.
7. Integrating a gender dimension into outcome monitoring.
8. Integrating gender into the PRS evaluation strategy.
9. Building institutional capacity for gender-sensitive monitoring and evaluation.

¹⁵ Adapted in part from Schalkwyk (2000), pg. 18.

¹⁶ Kyrgyzstan, Albania, Serbia, Bosnia and Herzegovina can for example be mentioned here.

¹⁷ World Bank (2003).

¹⁸ OECD/DAC.

- ✓ Including gender into projects and programming that address poverty issues:
Various tools such as checklists, stakeholder analysis, reviews and audits, and others that UNDP uses for monitoring and implementation can be developed to ensure that the objectives, outcomes, outputs, and indicators have a gender perspective.¹⁹ The idea is to mainstream gender into the tools that UNDP is already using for the analysis, implementation, and monitoring of poverty reduction projects and programmes.

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 the way that government defines poverty	National	Governments' 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
Gender disaggregated poverty rates	National, Regional	Percentage of women below official poverty threshold	The qualitative factors that caused poverty rates for women to differ from poverty rates for men	Gender statistics, data bases, statistical books, census data
Inclusion of specific gender issues in national Poverty Reduction Strategies (PRS) or other economic and social development strategies focusing on poverty reduction	National	Governments' specific view and plans to address inequalities that generate poverty; should include specific indicators to measure progress	In the absence of specific budgetary allocations to carry out the measures in the PRSP, it will be difficult to track if the strategy is being implemented	Poverty Reduction Strategy Papers (or similar documentation)

¹⁹ The toolkit developed by the EU can be useful: http://europa.eu.int/comm/europeaid/projects/gender/documents/toolkit_section_1.pdf section 6: Tools.

II. Measuring Poverty

What is the Issue? What is the Goal?

Measurement sets the parameters of poverty indicators, targets, and goals. It shapes the definitions of poverty and, consequently, dictates policy interventions and outcomes.

One of the major challenges in poverty measurement in general is the scarcity of reliable and disaggregated data—particularly the social and economic indicators (comparative over time) that are necessary for a gender-based analysis of poverty. Even scarcer is the qualitative data necessary for gender analysis of the macro and microeconomic processes that affect poverty along with the analysis of coping and escape strategies.²⁰

Issues that require attention in data collection for the purpose of a gender-based analysis of poverty are:

Dimension of measurement: The fact that the reasons and consequences of poverty differ, and that men and women experience and cope with poverty in different ways, means that measurements of poverty need to 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.²¹
- **depth 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.

The gendered nature of poverty is relatively diverse, both in different regions and countries, but also across social classes and over the life-cycles of men and women—which is why generalizations about “the feminization of poverty”²² are difficult to make. This is especially relevant for regions with different religious and ethnic minorities, since they usually exhibit large gender differences.

Households as a level of measurement²³

Using the household as a unit of measurement does not always give accurate insight into the way men and women experience poverty within households. Similarly, it rarely fully captures the impact of policies on households at the macro or meso level.

A pure comparison of male- and female-headed households is one of the first and simplest ways to use this measure. Although useful, the measure can also be misleading. For instance, female-headed households that receive remittances might be better off in terms of income than male-headed households or compared to those of widows or households that are female-headed because of the migration of men, although it is not depending on the characteristics of the household.

Although the use of households as a unit of measurement can be useful to determine characteristics of households associated with the gender of household heads, such as differences in dependency ratios and time, the situation analysis should not only take into account the poverty experienced by

²⁰ Razavi (1998).

²¹ For an extensive methodological note on measuring individual incomes based on household income see Bardone and Guio (2005).

²² Razavi (1998), pg.ii; Fodor (2001): pp. 91-107, 2001– where other measures such as malnutrition, ownership of consumer goods, quality of housing and subjective evaluation of poverty are analysed.

²³ The main conceptual elements for this section are taken from Çagatay, (1998).

women in households resulting from gender bias in the distribution of resources within households but also outside it. In other words, all forms of gender bias at the macro, meso, and micro level should be taken into account.

For example, economic analysis of the household rests on the premise that households are headed by “altruistic” heads (often male) who help guard families against crises and disasters²⁴. The assumption is made that this head equally shares resources such as income and assets with the rest of the household. Unfortunately, the reality has proven to be otherwise, and therefore measurements based on these assumptions fail to accurately capture the situation.²⁵ Policy interventions based on these assumptions then fail to address gender inequalities within households and even risk exacerbating inequalities. The social networks, socially accepted inter-generational solidarity behaviour, and other social norms present in the Europe and CIS countries must be carefully analyzed to understand the dynamics of the real situation in households as opposed to these economic model assumptions. Alternatively, then, households can be understood as sites of production and redistribution, cooperation and conflict, in which the different members have different status, decision-making, and negotiating power.²⁶ The analysis of household dynamics cannot be done in isolation but needs to consider interactions with social institutions such as the state and the market. In fact, analysis should go even further by incorporating the role of the macro-environment (economical, political, and social) as well, which, together with other factors, might shape the dynamics of a household.²⁷

Optimally, households should be analyzed through the lens of family, interpreted as a “contradictory institution through which power, affective relations, and resource distribution are played out at the micro level.” Although it remains a challenge to develop indicators and methods to fully capture this, the fact that individual levels of poverty cannot be determined from household surveys alone must nonetheless be taken into account, and alternatives 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 sex provides only a limited view of how women (or men) might be affected by poverty, as they most likely bypass crucial dimensions such as stress, poor self-esteem, and dependency.²⁸ Therefore, it is important to develop more comprehensive indicators to establish baselines and background for policy formulation. It is also important to keep two distinct issues present: the relative position of women to men (measured by gender gaps) and the evolution of women with respect to different dimensions of poverty over time. In addition, qualitative surveys can be made to capture subjective experiences of poverty and can explain behaviour that quantitative indicators fail to capture.²⁹

*The **goals** of gender mainstreaming in terms of poverty measurement are:*

- Ensuring **sex-disaggregation** and gender relevance in the collection and presentation of data.
- Using **complementary methodology** to reveal gendered aspects of poverty at both the household and individual levels.

²⁴ Kabeer (1991) p. 5.

²⁵ Beneria and Bisnath (1996) p. 14; The work by Amartya Sen and Naila Kabeer on conflict and negotiation within the household can also be explored, although most of their research is done in lower income countries.

²⁶ Kabeer and Agrawal.

²⁷ Beneria and Bisnath (1996), pg. 15.

²⁸ The results and analysis of the most recent Eurobarometer can be found at: http://europa.eu.int/comm/public_opinion/archives/ebs/ebs_162_en.pdf For a recent review of these measures see “US Poverty Studies and Poverty Measurement: The past twenty-five years” by Howard Glennerster at <http://sticerd.lse.ac.uk/dps/case/CP/CASEpaper42.pdf>. The UN Statistics division has methodological papers on the issue at: <http://millenniumindicators.un.org/unsd/methods/citygroup/rio.htm>.

²⁹ The World Bank provides a number of ideas where data to measure poverty and its impact can be found.

- 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 men and women.

Why Bother?

Credibility and Accountability: Measurement of poverty that ignores a gender dimension is incomplete and lacks credibility and validity. Furthermore, policy makers in governments and international financial institutions 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: Governmental policies will be more effective if a gender-sensitive approach in data measurement is applied. Gender disaggregated data can uncover nuances that need to be considered for the government to develop a poverty reduction policy that is gender sensitive. If the existing problems of society are adequately targeted and solved, then the whole economy will be more efficient.

Possible Interventions and Entry Points

- ✓ **Using a multiplicity of methods and measurements:** Policy makers should promote the use of both quantitative and qualitative methods when researching and analysing poverty, particularly from a gender perspective.³⁰ If one method fails to capture gender differences well enough or proves to hide bias, then other methods may be used to give a more realistic picture.

BOX: Gender Poverty Gap and Labour Market Participation in Russia and Poland

Labour force participation on its own does not explain the gender poverty gap. Fodor³¹ uses an income measure of poverty in addition to measures of malnutrition, ownership of consumer goods, quality of housing, and subjective evaluation of poverty. The analysis of six countries (Bulgaria, Hungary, Poland, Romania, Russia, and Slovakia) shows that labour market regimes also explain variations between countries. For example, in Russia the labour market participation rate is high while the poverty gap is large, compared to Poland where participation is low but the poverty gap is smaller. This can be explained by the wage gap, which is much larger in Russia compared to Poland.

Thus, the author explains, “in Russia many women work, but they experience significant discrimination in terms of wages...which results in disproportionate poverty....[whereas in Poland]...where the participation gap is the largest, women are often excluded or have withdrawn from the labour market, yet those who do work find themselves in a better position to seek comparable wages.”

³⁰ Fodor, Eva (2001).

³¹ Çagatay (1998), pg. 9.

- ✓ **Participatory poverty assessment (PPA):** This is a participatory research exercise, whereby poor people themselves suggest criteria for the analysis of poverty and 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 men's and women's views must be ensured.³²
- ✓ **Modernization of administration and policy-making:** This is a chance to improve and use administrative data for making a better policy analysis on poverty. In particular, access to income tax records and benefit records (which in most countries continue to be individual, not household based) could prove very useful. Contrasted with the actual population that should be paying taxes, it can also give an idea of the informal or undeclared economy. Appropriate measures should be taken to keep such records anonymous and for research and policy decision-making only.

CASE STUDY: Harmonizing Indicators of CEDAW in the Context of the MDGs in Kyrgyzstan

By harmonizing development indicators of several development frameworks, Kyrgyzstan has demonstrated its political will to implement international commitments to women's human rights.

The existence of the commitment to several international frameworks, such as the Millennium Development Goals, CEDAW, and the Beijing Platform for Action (BPFA), presented an opportunity for the country to create synergies between the commitments made and its national mid-term strategies. UNIFEM initiated and facilitated the process of harmonizing platforms and policies in an effort to minimize duplication of work and resources during the various stages of implementation, monitoring, and reporting on gender equality and women's human rights.

As part of this initiative, development indicators on gender equality and women's rights under CEDAW, BPFA, and several national strategies³³ were harmonized in the context of the MDGs. This harmonized set of indicators became the platform for mainstreaming gender into national plans and socio-economic programmes. Thus, it served as a basis for engendering the Second MDG Country Report; preparation of the Statistical Book on MDGs, with indicators disaggregated by sex; preparation of gender assessments (called gender booklets) of selected line ministries and governmental agencies; and finally, factual material on "Gender and the MDGs." It was also agreed with the National Statistics Committee to use the set of harmonized indicators for the preparation of the yearly statistical book in the context of the MDGs.

Moreover, with the mutual efforts of UNIFEM and UNDP and with the support of the Government of the Kyrgyz Republic, a number of gender experts have been included in the core government group that is developing the country's second PRSP. The main aim of the gender experts is to make the policy and action matrix of this mid-term strategy gender sensitive using the set of harmonized gender-sensitive development indicators.

Some of the products developed on the basis of this harmonized set of indicators can be seen at the web page <http://db.un.org.kg>, which was also developed within the framework of the UNDP global project "Gender and the MDGs."

Acknowledgement to: UNIFEM CIS

³² For example the National Plan of Action for the Advancement of Women.

³³ UNDP Poverty Report 2000, pg. 54.

- ✓ **Other databases and poverty dynamics:** Finally, the dynamics of poverty and its gender dimensions should also be taken into account, if the view that it is a process rather than an *outcome* is to be taken. Measuring persistence is one of the ways in which progress can be measured. For this, longitudinal data bases must be available. Other relatively cost-efficient ways of doing this are administrative records and small sample household surveys.

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 analysed.	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 cannot determine gender inequalities within households		Review of data sources
Other indicators such as health, education, housing, etc. access and use by sex and age	National, Regional	Other aspects of social exclusion	Might not be able to link to income poverty	Surveys, administrative records, qualitative sources

III. Poverty Eradication Initiatives

What is the Issue? What is the Goal?

If the definition and measurement of poverty includes a gender dimension, it is logical that this dimension should be reflected in the design and implementation of poverty eradication measures. Unfortunately, this is not always the case. Crucial data that highlights the importance of gender is sometimes lost when it comes to concrete strategies and programmes. At the same time, because of the complexity of the relationship between gender and poverty, merely to include a gender dimension to poverty eradication programmes is insufficient. Rather, programmes must be gender mainstreamed from the beginning for them to be well designed and gender sensitive.

Part of the problem lies in the poor coordination between pro-poor and pro-gender equality initiatives. While innovative and progressive work may be underway in either of these areas, “cross-fertilization” does not always take place—despite the fact that their common grounds suggest that mutually beneficial cooperation can be relatively easily established.

Furthermore, a review of poverty alleviation initiatives shows that when a “gender dimension” is added at the last stage rather than integrated through the whole project/programme cycle, it is almost always in the form of small-scale interventions targeted at women in general. These “adding on” approaches have a variety of negative effects:

- They **marginalize** the issue of gender as something “separate,” instead of considering it as an integral aspect of poverty-related problems and solutions.
- Such small interventions most often **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 long-term and short-term **goals** in designing and implementing poverty alleviation programmes must be two fold:*

- to recognize and address the **different needs** of men and women (practical goals); and
- to provide solutions that **challenge and transform** social, economic, political, and cultural institutions to perpetuate both gender inequality and poverty (strategic goals).

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.”³⁴ Poverty alleviation programmes that include strong accountability mecha-

³⁴ Beneria and Bisnath (1996), pg. 14; Clarke, (1997). Jackson (1996) states that “The instrumental interest in women as the means to achieve development objectives such as poverty reduction may ultimately undermine GAD. Gender appears to have collapsed into a poverty trap [making necessary] a discussion about the relative benefits of captivity vs. escape.”

nisms and 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 as well as having specific commitments nationally and internationally to gender equality and the protection of women's social and economic rights.

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. For instance, because the higher incidence of poverty in female-headed households 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 the well-being of the entire family. At the same time, and most importantly, the issue of women's economic independence must also be included in those arguments that focus on achieving gender-balanced poverty reduction programmes and projects. In other words, there can not be an instrumental use of women as this can also undermine poverty reduction objectives and actions.³⁵

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. In this respect, special attention should be paid to budget allocation, tax, and social policies.

Link: See brief on Macroeconomics and Trade.

- ✓ **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 awareness raising 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 to ensuring the integration of a gender perspective. In terms of poverty alleviation programmes, seeking the inputs of both poor men and women in

³⁵ Tadjbakhsh (1995), ‘The Women's Economic Survey of Tajikistan’, UNHCR/Relief International, Dushanbe, Tajikistan 1995.

designing, monitoring, and evaluating initiatives 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 men and women, and for providing data to help track progress. One helpful tool is a mapping survey. For example, the Socio-Economic Needs Assessment of Households Survey³⁶ seeks inputs from 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 project.)
- ✓ **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 poor.
 - Where possible, multiple and complementary targeted interventions should be planned (i.e., focusing 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. The differences in access to resources and services must be taken into account, and more balance in reproductive labour must be sought.

Link: See brief on Labour.

- ✓ **Strategic/practical objectives for a gender audit:** Draft programmes should be reviewed and analyzed to determine the extent to which planned objectives are either “practical” or “strategic.” Too few strategic interventions indicate that the programme should be revised (see box, below).

PRACTICAL OBJECTIVES	Meet basic, immediate needs of poor men and women (e.g., clean water, food, shelter, health, education).
STRATEGIC OBJECTIVES	<p>Will contribute to transforming the institutions partially responsible for perpetuating both gender inequality and poverty.</p> <p>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 and basic survival of the family).</p>

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 as well as reduce vulnerability to, for example, trafficking. 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, and thereby reduce the burden of women who have to look after the children.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Percent 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	Actual commitment to address inequalities through the specific measures linked to the indicators	Policy/programme review
Participation of gender specialist(s) in policy design	Sectoral	Can indicate commitment of policy makers to include gender perspectives in policy design	Extent and quality of gender-specialist impact; extent to which expertise was included in final policy	Process review
Male : female ratio of beneficiaries of poverty alleviation programmes (including micro-financing, training, job creation, etc.)	Project/ programme level	Whether men and women have been equally targeted and reached		Programme evaluation

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Labour

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Labour

Labour economics is related to gender in many different ways. Thus, this chapter is an attempt to capture such relations and highlight many possible ways of further engendering policies related to labour and the workplace. It examines the issues of productive and reproductive (unpaid) labour, investigates the reasons for unemployment in the context of gender and the ways to combat it, and covers specific gender aspects of employment policies such as occupational segregation, equal opportunities, and the introduction of family-friendly policies. The brief also provides an overview of most commonly used indicators and gives some directions for data analysis.

Key Indicators of the Labour Market (KILM)

This set of country-wide indicators was developed by the International Labour Organization (ILO) in an effort to monitor new labour market trends. However, despite the intention to incorporate a gender dimension into each of the indicators,¹ gender disaggregated data is not yet fully available or accessible at any level. Thus, there is some scope for gender mainstreaming efforts 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

Along with the initiative to increase the number of indicators for the monitoring of the formal sector, the informal sector should also be adequately covered in terms of indicators, and especially gender disaggregated indicators. Given that a large number of women are involved in the grey economy, especially in the context of the Commonwealth of Independent States (CIS), one of the goals of gender mainstreaming is to support development of a set of new indicators to monitor the situation in informal employment.

¹ Elderand Johnson (1999) p. 448.

I. Economic Activity and Time Use: Productive and Reproductive Labour

What is the Issue? What is the Goal?

Economic activity rate (labour force participation rate)² is considered one of the leading indicators of gender equality or inequality. As such it is also often used by the United Nations Development Programme (UNDP) to show female inclusion in the labour markets. An increase in the economic activity rate indicates higher female involvement in the labour markets and is mostly influenced by the advances in female education. On the other hand, a decrease in the female economic activity rate or its low level shows the opposite, and often indicates strong cultural stereotypes about gender roles that keep women out of the labour force, or regressive institutional arrangements that prevent women from entering and participating in the labour markets. For instance, a 30 percent rate of female economic activity may reveal a culture of dominant gender roles: Females are home makers, males are bread winners, regardless of women's potentially high educational achievements.

Of course, this is not always the case. In Europe and the CIS the trend of decreasing labour force participation rates for both men and women might also reflect other phenomena. Among these are privatizations (followed by lay-offs of workers), which often caused early retirement; the presence of a large informal economy; the discouraged worker effect³; changes in the pension or benefit systems; along with other reasons related to the general conditions of the labour market.

On average, male labour force participation rates around the world are uniformly higher than female. The Western economies also exhibit gender bias in employment. Nevertheless, there are significant variations of female rates among countries, which partially reflect existing levels of gender equality in different parts of the world.

However, despite being a relatively good indicator of existing trends in the labour market, the potentially misleading nature of this indicator should be considered as well. For instance, it measures unpaid work in productive activities, i.e., the unpaid family worker category (in small family enterprises), and in most countries more than half of this work is carried out by women. At the same time, it does not measure the unpaid reproductive work, i.e., work that is predominately done by women in homes and communities. Very often women over 24 are engaged in reproductive work that requires an investment of their time and energy equal or greater than productive work, but the indicator does not consider it. In addition, women, and indeed men, of roughly 15 to 24 who participate in education are also out of the scope and considered inactive. Therefore, lower economic activity rates (or higher inactivity) for women do not mean that women are an idle or wasted resource, since they tend to be involved in other type of activities that are not paid, such as unpaid reproductive work or studies. This is why efforts to increase female labour market participation rates must take into account gender gaps in time use more generally and be directed to seek more balance in hours spent on reproductive and productive work by men and women.

Women involved in reproductive work face several significant barriers:

- Their **time** to participate in the paid market is restricted.

² The economic activity rates are calculated as follows: unemployed and employed persons (labour force) as a percentage of the total working-age population (the population above a certain age).

³ The discouraged worker effect can be defined as: 'the decision to refrain from a job search as a result of poor chances on the labour market. Discouragement effects can arise from a lack of individual qualifications, from discrimination in the labour market or from a high local level of underemployment'. Van Ham, Mulder and Hooimeijer (2001).

- Their **personal income** is restricted.
- Their **choices** (such as participation in politics, work on self-improvement, or recreational activities) are limited as a result of less time and money.

This shows that reproductive work is an important element of labour market policy-making and analysis, and that gender equality in the labour market will only be fully achieved once the deserved attention has been given to reduce differences in gender roles in the unpaid reproductive sector. Such action would also help to avoid inefficiency in the implementation of specific labour market policies (i.e., training, job placement services, and direct job creation as part of active labour market policies). At the broader macroeconomic level it would increase efficiency in terms of taxes and benefits as key elements in budgetary planning.

Simultaneously, the quantitative equality of economic rates for men and women that proves gender balance does not necessarily mean that the two sexes are treated equally within the labour market. Therefore, gender mainstreaming in the labour market must go beyond mere quantity (i.e., economic activity rates) to discover how, where, by whom, and under what conditions men and women are (or are not) engaged in reproductive and productive labour. Therefore, gender mainstreaming in the long-run should aim to correct these imperfections by achieving **two goals**:

- Equal opportunities for men and women to participate in the **productive labour force**.
- Equal division of **reproductive work** between men and women.

For these long-term objectives to be achieved, a *medium-term goal* is to increase the scope for choice among men and women to encourage a more equal division of both productive and reproductive work. Equal participation of both sexes in the labour market remains *the final policy goal* towards which gender mainstreaming efforts should strive.

Link: See brief on Macroeconomics and Trade, Reproductive Work.

Why Bother?

Justice: The burden of social reproduction is almost exclusively born by women. This limits their ability to participate in the labour market. This also impedes women's right to work and questions the commitment of society to women's economic independence. The Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) contains a number of articles that apply directly to nondiscrimination in employment, obligating the state to follow the convention to eliminate discrimination against women and to ensure the same rights for men and women in employment, in particular—including the free choice of profession; the same employment opportunities, benefits, and conditions of service; vocational training; and equal pay for work of equal value (Art. 11.b, 11.c, and 11.d).⁴

Efficiency: The 'efficiency argument' is used in the context of the link between increased gender equality and economic growth. Some recent World Bank and European Union research⁵ shows that there is strong evidence of such a relationship with both short-term and longer-term effects. One such indicator is the level of female economic activity,⁶ which demonstrates that removing barriers

⁴ For analysis and cross-reference of CEDAW, Beijing, and the MDGs see UNIFEM-GTZ (2005).

⁵ World Bank, Gender and Development Working Paper Series: Löfström (2001); Mörtvik and Spänt /OECD (2005).

⁶ See, World Bank.

to women entering the labour market means increased economic growth and development. This argument does not focus on “making use of an idle resource” but rather on removing obstacles to full and equal economic participation, which thereby serves as a catalyst for enhanced development and economic growth in the short and long-term by increased competition on the labour markets. It is the elimination of resource misallocation—which, through sub-optimal labour quality, reduces output—that will add to the growth and development process once the barriers are removed.

Link: See brief on Macroeconomics and Trade

Possible Interventions and Entry Points

✓ **Removal of legal barriers to female productive employment or male reproductive work:**

A review of legislation from a gender perspective highlights the legal barriers to women’s full involvement in the productive labour market (e.g., restrictions placed on women to enter certain professions or to perform certain tasks). Similarly, the restrictions that prevent men from full participation in reproductive labour (e.g., the denial of paternity leave for fathers) can be revealed and addressed with adequate policy measures.

CASE STUDY: Equal Opportunities and Discrimination in Moldova- Gender Discrimination in the Labour Market

In compliance with the Constitution of the Republic of Moldova, all citizens of the country have equal rights regardless of sex. Within the project “Promotion of gender equality through legislation,” supported by the United Nations Development Fund for Women (UNIFEM), a gender analysis of the legislation and a draft law on equal opportunities for men and women was developed.

Nevertheless, indirect gender discrimination in the labour market continues to be a problem. For example, about 70 percent of the complaints received by the Labour Inspection Department in the last few years were from women, and many were about discrimination while seeking employment. This was reflected in the questions asked during the interviews, such as: is the candidate married, how many children does she have, etc. Moreover, employers often requested submission of a medical certificate to prove that the applicant was not pregnant.

Why does it happen?

- Employers foresee bearing costs related to the reproductive function of women: existence of children who need care, possible additional sick-leave for childcare, maternity leave, etc.
- Legislation shortcomings: It is very difficult to prove the existence of discrimination in this regard given that it is not directly forbidden by law.

Gender Equality Actions

- The Republic of Moldova conducted a CEDAW-based gender analysis of legislation to identify gaps in existing laws.⁷
- In February 2006 the law on equal opportunities for men and women was approved by the parliament and a special article was included, stipulating the relationship between employer and employees.⁸

⁷ Osmochescu, Rotarciuc et al. (2004).

⁸ Official Monitor of the Republic of Moldova (2006).

Challenges

The next important step is the development of mechanisms and tools for the law's implementation. The ultimate goal of the government's policy should be the total elimination of gender discrimination.

Acknowledgement to: Valentina Budrug-Lungu, Project Manager, UNIFEM, Gender Equality Legislation in Moldova.

- ✓ **Publicly provided care options:** State or corporate support for reproductive labour, such as the provision of childcare or support for dependant adults, can significantly increase women's participation in the productive labour market. For example, research shows 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.⁹ In Sweden, childcare options are largely sponsored by local governments. There are increasingly more examples in the private/corporate sphere that demonstrate increased productivity in the workplace as the result of greater reconciliation between work and private life.¹⁰
- ✓ **More specific research on 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. In addition, efforts must be made to create incentives for men to participate more widely in care and reproductive work.
- ✓ **The impact of the design of tax and benefit systems on women's activity and employment opportunities should be carefully considered:** In addition to in-kind support already mentioned, the incentives and disincentives that tax systems can have on women's economic activity (for example, joint vs. individual taxation) as well as benefit systems (for example, universal vs. means-tested) should be carefully assessed. There is a need for reform given that the design of those systems in many countries¹¹ is based on the male bread winner model. The appearance of other family models in society, in particular single-parent families, makes this even more important as they can be particularly affected by gender-blind changes of the tax-benefit system. In the UK, for example, the Ministry of Finance has taken into account information presented by the UK Women's Budget Group to address specific tax-credit changes that did not take into account the situation of lone-parents.¹²

BOX: Tax-Benefit Regimes in the EU¹³

Despite great variations that have been observed within the EU 15 in terms of the "models" that outline access of women to the labour market, along with the form and number of rights derived from employment and the difficulty of classifying them, the table below provides a good overview of the situation in different countries. It points out gender differences on entitlement to benefits and their bases, the recipients of those benefits, and who does the care work. Together, these indicators highlight the limitations of some models regarding women's access to certain rights of employment.

⁹ Jaumotte (2003).

¹⁰ See European Commission.

¹¹ Villagomez, *et al* (2004).

¹² www.wbg.org.uk.

¹³ Adapted from Villagomez *et al* (2004).

	Male bread-winner or General Family Support	Separate Gender Roles or Market Oriented	Individual earner-carer or dual earner	"Gathering bread-crumbs"
Location	Continental Europe	Anglo-Saxon countries	Scandinavian countries	Mediterranean Europe
Conciliation model	Combination	Choice	Continuity	Choice without support
Ideology	Husband= earner Wife= carer	"Flexible" division of labour Husband= earner Wife= ½ earner/ carer	Shared tasks Father = carer-earner Mother= carer-earner	"Blurred" division of labour Father= earner Mother= carer/ earner
Entitlement	Unequal among spouses	Differentiated by gender role	Equal	Unequal among spouses and among workers
Basis of entitlement	Principle of maintenance	Family responsibilities	Citizenship or residence	Principle of maintenance/ of need
Recipient of benefits	Head of household + supplements for dependants	Men as family providers; Women as caregivers	Individual	Individual
Taxation	Joint Taxation Deduction for dependants	Joint Taxation Deduction for dependants	Separate taxation Equal tax relief	Individual Minor deductions
Employment policies	Priority to the main income provider; Flexibility for secondary earners	Segmented Full time/part-time	Aimed at both sexes Full time/part-time Public/private sector	Dualistic Core/periphery No flexible arrangements
Female labour force participation	Middle/low High discontinuity Short-time work	Middle/high High discontinuity Short/medium and part-time work	High High continuity Long part-time work	Low High continuity Full-time
Sphere of care	Partial state involvement	Weak state involvement	Strong state involvement	Weak state involvement
Caring work	Paid component to caregivers in the home	Paid component to caregivers in the home	Paid component to caregivers in the home and outside the home	Unpaid
Political tendency	Corporatist/conservative	Liberal	Social-democratic	Corporatist-left ¹⁴

¹⁴ León (2002)

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, disaggregated by age)	National (also, regional or local)	Gap in activity rates between men and women To some extent, the existence of pervasive barriers (legislation, stereotypes) that keep women out of the labour market altogether	Qualitative inequalities of participation Gender balance in reproductive work	Labour market surveys
Male : female ratio of hours spent on both productive and reproductive work, (disaggregated by age)	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*

Link: See brief on Macroeconomics and Trade, Part II: Reproductive Work.

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. Although unemployment is a problem for both men and women, data shows that unemployment rates tend to be higher for women than for men. There are many explanations for this situation:¹⁵

- Unpaid reproductive work is more common for women than men. Women are more likely to enter and leave the workforce for reasons linked to their roles in social reproduction and care for other family members. Because of the high frequency of exits and entries, proportionally more women than men will be looking for jobs.
- Women face direct barriers in employment such as lack of available jobs. They are more likely to stay within a certain range of career options that, due to limited supply, might not be always available or, if available, are under massive competition.
- Women often lack the education and skills required for employment, which is why they are sometimes not highly valued as employees. That leads to the creation of stereotypes and causes discrimination. An example of this is the status of female workers in company restructuring: Women are likely to be those first affected by lay-offs and made redundant.
- Women tend to change their status in the labour market more often than men, frequently switching from employment into unemployment and inactivity, which explains why depreciation of skills is more typical for women than men, in that way affecting their employability.¹⁶

In addition, high unemployment and inactivity rates among women may also result from their high involvement in the informal economy as well as the age discrimination that older and younger women face in labour markets. Indeed, as the United Nations Economic Commission for Europe (UNECE)/UNDP regional database shows,¹⁷ the activity rates across countries for both younger and older women are much lower than for women within the middle age group.

However, unemployment is not gender-exclusive; unfavourable economic conditions and socio-economic upheaval common among transition countries such as those in Europe and the CIS also increase male unemployment. In many socialist countries unemployment among men rose more quickly than among women.¹⁸ The gender dimensions of unemployment in this respect depend on precisely what sectors are affected. Traditionally male-dominated sectors (mainly heavy industry) leave mostly men without work when being privatized or restructured, whereas the opposite happens when the sectors under restructuring are those dominated by women (mainly textiles and public sector services). This sheds light on gender and geographical dimensions of the transition process.

One of the recommended policy solutions to tackle both male and female unemployment is training, re-training, and continuous life-long learning as part of the active labour market approach. This policy needs to be designed to be effective and quick, but also directed towards understanding the

¹⁵ Elder and Johnson (1999), p. 459.

¹⁶ Inactivity for men in most cases is related to disability and retirement, although many more men nowadays become inactive as a result of depressed social and labour market conditions or changes in the rules for social welfare.

¹⁷ UNECE, Gender Statistics Data Base.

¹⁸ However, this rise might also be due to a statistical effect since men's activity rates have also dropped while men's mortality has risen. In other words, there are two elements in the formula that are affecting the indicator.

different reasons for unemployment¹⁹ and then adequately adjusted. Unpaid reproductive work also needs to be considered in order to avoid increasing inequality in employment. At the same time, the design of active labour market policies should incorporate specific gender, geographic, and economic factors to better target unemployment in specific regions.

Counselling in job-search activities is another active labour market policy measure. This measure should be designed to be gender sensitive because men and women differ in the way they look for jobs. While men tend to make use of their informal networks more often than women do when searching for jobs, women depend more on public employment services.²⁰ This is important to consider when designing services, which should take into account such variables as distance/location, family responsibilities, and hours of availability in as much as these all influence the extent to which men and women are able to access these services.

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

- To **minimize unemployment and unemployment duration** amongst both men and women.

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

- To integrate economic, **cultural, social, and historical factors** that influence unemployment among men and women into policy-making.
- To develop **job-creation and retraining** schemes that address the disparate needs and situations of men and women.

Why Bother?

Accountability: Job creation is often a promise of politicians, whether as part of their election platforms or government proposals. Any policy measure that aims to reduce unemployment, such as retraining, must benefit both men and women, and governments should be held responsible for those policies that do not benefit both equally. Comparisons of male and female unemployment levels together with other labour market indicators can assist in doing so. In most countries legislation on equal opportunities and anti-discrimination is already in place, so that fulfilling these commitments also increases accountability.

Chain Reaction: The issue of unemployment (or underemployment) is closely linked to issues of sustainable livelihoods and poverty. Thus, poverty reduction programmes must also make sure to address the social, cultural, and historical factors that make unemployment and the lack of sustainable livelihoods a gender issue. This is particularly relevant for reducing the factors that can lead to trafficking in women for sexual exploitation or other exploitative labour situations.

Link: See brief on Poverty

¹⁹ The reasons may be lack of productivity or erosion of skills due to family responsibilities, Layard, Nickell, and Jackman (2005) or massive lay-offs as a result of restructuring and, consequently, a lack of jobs in the same occupation where the workers used to be employed.

²⁰ Melis (2003).

BOX: 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 (CEE) and the CIS. 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 and cost caused by transition, at the same time researchers note that they have often been better able to survive, 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. Suddenly given the role of bread-winner, this role was simultaneously threatened by mass unemployment, resulting in a “crisis of masculinity.” This shock has, unfortunately, resulted in high rates of male mortality, suicide, and alcoholism.²¹

However, as pointed out in the recent UNIFEM study based upon regional research, this situation has in turn affected women by increasing the proportion of widowed women with family responsibilities and by a higher incidence of domestic violence and poverty. Under these circumstances, women became managers of the poverty that affects their households: “The ability of households to survive is exacerbated by men’s drinking, since spending on alcohol becomes a priority over spending on other family needs.”²²

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 downsizing 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.
- ✓ **Research:** Undertake more detailed sociological and economic 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:** As mentioned above, 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 sexes. For instance, the time of day that the training takes place and the care facilities or other support that are offered to women while re-training as well as transport are of the utmost importance. Those who have been out of the labour force for a long time will also need support in job-seeking skills, interview skills, and—depending on the level of social exclusion—social skills. All of these have specific gender differences to be dealt with.

²¹ See True (2000).

²² UNIFEM (2006), p. 17.

Furthermore, care should be taken not to entrench occupational segregation 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.

Maintaining a high level of economic activity is also closely linked to life-long learning as a strategy to enhance the opportunities of men and women to adapt and maintain themselves in employment in the face of changes in the labour market as well as to acquire personal, social, and civic skills.²³ Training that develops new skills, particularly technical or information technology (IT) skills, must recognize the nature of the changes that are taking place in the work environment and must adapt training techniques to the needs of displaced members of the workforce. Life-long learning must accompany strategies that aim to bank on highly skilled workforces, not those aiming to attract investment through low wages and diminished labour standards.

- ✓ **Gender-sensitive activation of unemployment benefits:** In the context of reform of benefit systems, the unemployment benefit must take into account the weaker connection that women have with the labour market due to their family responsibilities. Activation rules (payment or duration of the benefit) dependant on the efforts of the job-seeker cannot be equally applied to different segments of the population. In this respect, tailor-made measures need to accompany more general changes regarding eligibility for social programmes.²⁴ Those using public employment services will usually have lower skills and greater difficulty finding and keeping jobs.²⁵

²³ ILO (2005)

²⁴ Ibid.

²⁵ Addison and Portugal (1998)

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female unemployment rate (disaggregated by age group)	National (also regional)	Gender gap in unemployment levels	-Reasons for unemployment -Differences in male and female success in re-entering the labour market	Labour force survey
Male : female ratio of long-term unemployment rate (percent of job seekers who fail to find employment within 6 months disaggregated by age group)	National (regional)	Gender gap in chronic unemployment can indicate prevalence of discrimination in hiring practices, or failure of training schemes to equally prepare men and women to re-enter the labour market	Precise reasons for job-seeking failure, but the same sources of information usually have variables that can help to explain this	Labour force survey and administrative data from the public employment service
Male : female inactivity rates as well as the reasons for being inactive	National (regional)	The extent to which women and men leave the labour force and the reasons for it	Depending on the design of the survey, the reasons for being inactive might not cover all the possibilities	Labour force survey and administrative data from social security pensions and benefits
Male : female ratio of placement through the public employment service (disaggregated by age group)	National (regional and local)	-Gender gap in public employment placement -Can indicate the effectiveness of the public employment service vis-à-vis the rate of unemployment for each of the sexes	Precise reasons for different placement rates	Administrative data from the public employment service

III. Employment

What is the Issue? What is the Goal?

From the previous sections on economic activity and unemployment, it is clear that being active in the labour market does not guarantee that gainful employment will actually materialize, or that the wages or payment obtained from it will guarantee decent living conditions. This is particularly the case when the economy is adjusting to the effects of major changes such as those experienced in recent years by the CEE/CIS countries. These changes include privatization, lower wages, cheaper working conditions (to attract foreign investment), and the absence (or inadequate design) of employment policies (for example, those focusing more on flexibility and less on job security).

In relation to this, access to gainful work and employment that protects human integrity and creates satisfaction is indeed the primary goal set by the ILO. More specifically, "it involves opportunities for work that is productive and delivers a fair income, security in the workplace and social protection for families, better prospects for personal development and social integration, freedom for people to express their concerns, organize and participate in the decisions that affect their lives, and equality of opportunity and treatment for all women and men." Decent work has recently been linked to the achievement of the Millennium Development Goals (MDGs).²⁶

The concept of "decent work" to some extent opposes the popular notion of the importance of labour flexibility (e.g., part-time work and fixed-term contracts), which aims to reduce unemployment (often targeting women since they are most often involved in such activities) but which is inherently less secure than full-time employment. These two relatively opposite concepts, however, have a common base: Both theory and practice show that flexibility and employment levels are correlated, although to some extent negatively to the concepts of protection and security that are part of the definition of "decent work." Still, positive employment growth and tighter labour market conditions as the results of such flexibility will have a gender-positive impact and eventually lead to less discrimination, higher protection, and greater security. Given that flexible work, though less secure, can still be "decent" in the context of the ILO definition, one possibility is to increase efforts to foster flexible arrangements, but only where the state is willing and able to provide the necessary social protection and human rights. Such a situation is already present in some EU countries, which introduced greater labour flexibility in the 1980s and early 1990s.²⁷

BOX: New Thinking on Employment: The EU Policy Approach

In Western Europe and, more specifically, in EU member states during the 1970s and 1980s, certain economic changes occurred in the Europe and CIS countries: namely, the oil shock, restructuring, and privatization. The effects on unemployment gave way to new thinking in the EU context on labour market policies and, in particular, on employment creation. In the first place, the approach was to reduce unemployment benefits and introduce more flexible working arrangements (see also box, below). Later, new policies were put forward in the context of the knowledge economy and the new challenges of globalization.

²⁶ ILO (2005).

²⁷ Giuseppe, Tito, Sandrine (1999).

These changes were followed by a more gender-sensitive approach in EU employment policy and legislation. The European Commission launched a set of recommendations to EU member states regarding the obstacles that women faced in the labour market. It was recognized that female employment rates would be difficult to raise unless these barriers were addressed. However, it was also recognized that these efforts had to include policies that created incentives for men to shoulder more care work as well as tackle the obstacles that prevented them from doing so. Unless efforts are made to make men 'exit' the labour market, efforts to make women 'enter' the labour market will have only limited effect. EU directives on parental leave do exist,²⁸ but in the EU policy context this issue is limited to urging member states and their social partners (trade unions and employer associations) to advocate for increasing parental responsibilities for men.²⁹

There are various solutions to dealing with female unemployment—applicable to the countries in Europe and the CIS, but also in other locations. First, policies dealing with employment creation must incorporate both the baseline supply-side and demand-side aspects, as they altogether affect the opportunities men and women will have in finding and keeping new employment. As a recent World Bank paper shows,³⁰ the changes taking place in the labour market together with the changes made to the benefit and pension systems have disproportionately hurt women as they typically held lower-end jobs, had a lower retirement age, and already had lower wages before transition. This indicates the importance of both supply-side and demand-side policies in the context of gender.

Link: See IV. Occupational Segregation, below

Unemployment may also be managed through the introduction of a more modern work organization—one that offers flexibility for women at work, creating some particular advantages in terms of balancing family and work life. Indeed, these should not only be aimed at women but men as well.

Another way of raising employment is by fostering entrepreneurship that will lead to more job creation. Women's full potential in this area has not been realized due to various factors, including lower access to credit, but also due to a difference in the approach to entrepreneurship. Furthermore, many of these potential entrepreneurs are relegated to do their business in the informal market, which has detrimental effects both on the development of the business as well as on the tax system and on women's access to the benefits of the tax system.

Link: See brief on Private Sector Development

Reduction of informal employment or undeclared work is yet another challenge that the CEE/CIS countries are facing. Although informal employment offers a coping strategy and helps families get out of poverty, the informality also means the lack of legal and social protection. Nevertheless, a careful approach towards legalizing informal activities is needed given the size and importance of the informal sector. A recent UNIFEM report focusing on the situation in Bulgaria has found that the informal market is in itself heterogeneous and ranges from unprotected salaried work and precarious self-employment to services and goods traded outside the formal markets that are meant to complement family incomes. The report further suggests that women engage in the informal economy mostly for economic reasons, and that they perform informal work either because their formal sources of income are insufficient or because they cannot access employment in the formal economy.³¹

Link: See brief on Macroeconomics and Trade for additional related arguments

²⁸ Council Directive 96/34/EC of 3rd June 1996 on the framework agreement on parental leave concluded by UNICE, CEEP and the ETUC - COM (2003), p. 358.

²⁹ http://www.europa.eu.int/comm/employment_social/gender_equality/gender_mainstreaming/familylife/family_life_reconciliation_en.html.

³⁰ Castel and Fox (2001).

To sum up, the **medium-term goals** of policy-making are:

- To remove barriers to employment on the supply and the demand side for men and women.
- To anticipate further reductions of employment due to restructuring and privatization such that the evolving situation can be better addressed, taking into account the baseline situation.
- To foster entrepreneurship.
- To encourage the progressive formalization of the informal economy, one consequence of which will be the better protection of women

The **final policy goal** remains:

- To increase gainful employment of both men and women.

Why Bother?

Justice: The recent ILO initiative on decent work makes clear links to the importance of such work in reducing poverty and thus achieving the Millennium Development Goals. Furthermore, access to productive and gainful work is a basic human right according to article 23 of the Universal Declaration of Human Rights. While for a variety of reasons some people do choose, will continue to choose, or are forced to choose homemaking, child-rearing, or other unpaid work as their only activity, cultural stereotypes and gender roles that restrict the ability to choose paid work is a violation of the right to self-determination and gainful employment.

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 and not making any improvements in employment. While dramatic unemployment and underemployment mean less productivity (and efficiency) for the nation as a whole, this also has obvious effects at the household and individual level.

BOX: The EU Employment Strategy and the Case for Increasing Women's Employment

Faced with soaring unemployment in all EU member states, the European Commission presented a "White Book on **Growth, Competitiveness, and Employment**" in 1993, which was the basis for the European Employment Strategy.³² Gender equality has been present throughout this process and, more concretely, throughout the formulation of policies on the reduction of the wage-gap, reduction of occupational segregation, increasing entrepreneurship, and strengthening the balance between work and family life. Some of the most interesting policy changes have been introduced in Spain, including subsidies for employers' Social Security contributions for women over a certain age and women in social exclusion situations, a 100 Euro per month/per child allowance for working mothers, equalization of rights and benefits for part-time workers, and the most recent change (affecting only government workers) providing 10 days paternity leave for new-born or adopted children.

Possible Interventions and Entry Points

- ✓ **Link macroeconomic and development strategies to employment creation:** A review of recent employment policy interventions in CEE/CIS countries shows that macroeconomic constraints

³² European Commission (2005).

and how they are addressed can be the worst enemy of well-intended employment policies.³³ It seems that macro-strategies often focus their attention on price stability rather than employment growth. In addition, many times macroeconomic policies are gender-blind and socially insensitive. No mechanisms are included to deal with the specific problems created by unemployment, and even less so those taking gender-specific concerns into account.

- ✓ **Strengthening labour market institutions:** The strengthening of democratic employers, worker associations and unions, and/or women's sections within these organizations should be encouraged as a way to foster social dialogue and to bring gender concerns to the negotiation table, especially those in the area of reconciliation of work and family life and flexibility of the workplace and the workforce. The introduction of women's groups within unions can also help in this regard.
- ✓ **Reforms of the social security systems:** Recent and on-going reforms can be seen as a chance to rid systems of obstacles to increasing women's employment. Special care should be taken to provide transitional measures, taking into account the existing rules—especially those that can negatively affect older workers and lone parents. The use of the tax system to finance these benefits can be a powerful instrument to create incentives to reduce undeclared work and also to acknowledge unpaid care work. All and any of these interventions would benefit from specific studies of the gender impact in this area.
- ✓ **Micro-credit:** Promotion of gender sensitive micro-credit schemes to establish small businesses as part of the general initiative for wider micro-credit availability has proven to be a popular and effective way of addressing sustainable livelihoods for poor men and women. However, care must be taken to avoid occupational segregation in the identification of business opportunities for women and differentiating survival activities from business opportunities.

Link: See brief on Private Sector Development

BOX: Social Partnerships in Estonia for Women's Entrepreneurship

The ILO³⁴ has implemented a successful programme in Estonia that aimed to promote the economic revitalization of rural areas through the boosting of women's entrepreneurship and employment. The programme included intensive skills trainings of the women receiving the credits, and was implemented with the assistance of local governments, women's organizations, trade unions, and business groups.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Employed women as a share of total female working age population (employment rate), if possible also by age group	National (also, regional or local)	Gender gaps in actual employment opportunities	Qualitative inequalities of access to employment	Labour market surveys

³³ See, for example, ILO (1995) chapter 5.

³⁴ ILO (2002).

IV. Occupational Segregation and the Influence of Stereotypes in the Labour Market

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 ways³⁵:

- **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., majority of school heads may be men while the majority of teachers are women).

In addition, examination of the situation in many diverse countries shows that traditionally “female” occupations are paid less and carry less prestige in society.

Although there are mainstream economic theories that explain occupational segregation, “they fail to consider adequately a number of critical, non-economic and non-labour market variables and forms of behaviour.”³⁶ This is mainly a result of gender stereotypes whereby abilities and competencies in the labour market are consciously or unconsciously judged by the perceived characteristics of women. The following is a list of how these stereotypes can affect the occupations and sectors in which women work.³⁷

- 1) Caring nature - nurse, social worker, teacher, midwife
- 2) Skill in household-related work - maid, housekeeper, cleaner, hairdresser
- 3) Physical attractiveness - receptionist, sales person, shop assistant
- 4) Disinclination to supervise others
- 5) Lesser physical strength.
- 6) Lesser ability in science and mathematics.

Another set of stereotypes may also explain to a great extent the features of certain jobs such as lower pay, lower status and, again, lower authority:

- 1) Greater willingness to take orders, greater docility, and lesser inclination to complain about work or working conditions.
- 2) Greater willingness to accept lower wages and less need for income.

In addition to stereotypes, cultural restrictions imposed on women in some societies can also determine the jobs that women take, as the following box shows.

³⁵ H. Melkas and R. Anker (1998). For an excellent discussion on the problems measuring occupational segregation and innovative tools to measure occupational differences and inequality, see Blackburn and Jarman, (1997) and Anker, (1997) where the neo-classical, institutionalist and feminist contributions to understanding occupational segregation are clearly presented.

³⁶ Anker, (1997).

³⁷ Based on Anker (1997).

BOX: Occupational Segregation in CEE/CIS Countries

Most studies point out that occupational segregation explains an important part, although not all, of the wage gap between men and women. According to analysis by UNECE, “In many countries, a more mixed labour force hides the emergence or reinforcement of occupational segregation. This is the case of transition countries where women are being pushed out of what are now better-paid jobs in financial services and moved into public service jobs such as health and education. Financial services, which were feminized and underpaid in the past as compared to male-dominated heavy industry, have been “catching up” in the process of market building: job opportunities have expanded and wages increased. The opposite was true for education and health services.”³⁸ See table, below, where these claims are documented.

Changes in female employment in financial services and education in selected transition countries (percentage women in total employment in respective branch)

	Financial services			Education		
	1993	1997	Change	1993	1997	Change
Latvia	90	66	-24	78	80	+2
Lithuania	86	72	-14	67	77	+10
Russian Federation	86	72	-14	72	74	+2
Hungary	76	66	-10	76	76	None
Estonia	76	68	-8	86	92	-4
Slovakia	77	72	-5	75	79	+4
Slovenia	69	67	-2	74	78	+4
Czech Republic	67	68	+1	72	77	+5
Romania	62	65	+3	69	72	+3
Poland	52	70	+12	74	76	+2

Source: Ruminska-Zimny based on data from UN/ECE 1999. For Latvia, Lithuania, Russian Federation (1972-1997); Estonia, Hungary (1992-1996); Romania, Slovakia (1994-1997).

The medium-term goals of policy-making targeting occupational segregation are:

- **Elimination of stereotypes** through education and information campaigns, but also through a strict application of anti-discrimination law and equal-pay legislation.
- **Appropriate changes in the educational systems** linked to reducing gender stereotypes in choosing careers.
- **Strengthening women’s link to the labour market** through better support for care of dependant family members (both children and adults).

Accordingly, **the final policy goal** should be:

- **Equal prevalence** of men and women both vertically and horizontally throughout the occupational spectrum.
- **Equal opportunities** for men and women to choose their profession.

³⁸ Ruminska-Zimny (1999) p. 8.

Why Bother?

Efficiency: “Occupational segregation by sex negatively affects the efficiency of the labour market as a whole.”³⁹ 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. Wages and, therefore, goods and services are being mis-priced, and men and women are potentially doing the wrong jobs. Output could and would be higher if greater gender equity prevailed.

Additionally, the so-called “glass ceiling”⁴⁰ 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, which is quite common in transitional economies, negative effects or trends might be exacerbated by 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 adversely affects both men’s and women’s career opportunities, as their options are limited, due either to stereotypes they themselves have inherited and now espouse (e.g., “As a man, I can’t be a nurse”) or to biases they will face from potential employers.

Possible Interventions and Entry Points

- ✓ **Anti-discrimination policies plus enforcement mechanisms:** 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. Also, they can further influence the application of equal pay for equal value. 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:** 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.

³⁹ Melkas and Anker (1998) p. 5.

⁴⁰ This refers to impediments that prevent women from rising to top positions in an organization, whether public or private. More recently this is being focused at the policy level as balanced participation of women and men in decision making. Thus, this includes the political, public, judicial, social, and economic domains. The term “glass” is used as these impediments are apparently invisible and are usually linked to the maintenance of the status quo in organizations as opposed to transparent and equal career advancement opportunities for women and men within organizations.

Link: See brief on Education

- ✓ **Child-care and other family-friendly policies:** Vertical segregation is partially caused by the continued assumption that women have sole responsibility for unpaid reproductive work. A more even distribution between men and women of reproductive labour (child care, elderly care, housework) will break stereotypes and will help bridge this gender gap.
- ✓ **Transparent Career Paths:** In the area of corporate responsibility, transparent career paths for women and men should be encouraged from the public arena and apply to both civil servants and private sector employment.

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) ⁴¹ (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	Labour market surveys (Specific data analysis required)

⁴¹ This is a measure of statistical association, which ranges from 0 (no segregation) to 1 (total segregation). It refers to the minimum proportion of men plus minimum proportion of women who would need to change occupation so that the female proportion is the same in all occupations. See Melkas and Anker (1998) p. 102 for a complete mathematical definition. Also, see Blackburn and Jarman (1997) for an innovative measurement that includes vertical segregation.

V. Equal Opportunities and Sex 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 his or her 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.

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 “suitable” 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 job. 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”).

Career advancement: Employers may deny career advancement privileges to one sex (most often women) because of false assumptions made about their leadership or management skills, or because they assume women have too many family responsibilities.

Wages and Benefits: Men and women may not be equally remunerated for work that is of equal value. Pay discrimination, therefore, is a failure to reward equal or similar human input with equal or similar wages. At times, this type of discrimination may also manifest itself by giving different types of contracts (full-time versus part-time or fixed-term contracts) to one sex or the other or by introducing “false” categories of workers within a firm to justify the differences. Also, it is present when unequal benefit packages are introduced for performing equal work. 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 accepted. This type of discrimination should be viewed in the context of power relations and distorted views on gender relations that are used to legitimize such inappropriate and illegal behaviour.

Indirect discrimination: This occurs when there is a requirement (rule, policy, practice, or procedure) that is the same for everyone but has an unequal or disproportionate effect on a particular person, group, or groups of people. Indirect discrimination may arise in relation to the operational requirements of a workplace such as shift arrangements, start and finish times, requirements to work full-time, and the like. For example, a certain group of people, such as men and women with family responsibilities, may not be able to comply with some of the requirements.⁴²

⁴² Taken from the website: www.solicitoradvice.com/direct_indirect_discrimination.htm.

Why Bother?

Justice: The most obvious reason for ensuring equal opportunities and equal treatment stems from the argument for justice and fairness. There are absolutely no grounds for denying equal individual opportunities based on sex. Discrimination on this basis must be eradicated in the form of the numerous treaties, conventions, and normative documents that demand gender equality, particularly within the labour market.

Efficiency: As pointed out in the previous sections, reduction in the inequalities between men and women in the labour market will bring about greater economic efficiency as human resources are correctly priced and used to their full potential. Discrimination on gender grounds is a market distortion resulting in the misallocation of labour and other resources.

Possible Interventions and Entry Points

- ✓ **Anti-discrimination legislation:** Usually, national constitutions contain so-called equality clauses, providing for equal treatment and prohibition of discrimination based on various criteria, including sex. Recognizing the need for addressing existing patterns of discrimination in a comprehensive manner, anti-discrimination laws have been drafted in many countries of the CEE/CIS region. Some of those laws address discrimination based on multiple criteria (e.g., discrimination based on gender, minority status, religion, ethnic background, etc.)⁴³; others address discrimination of one specific group (e.g., gender equality laws).⁴⁴ Legislation prohibiting discrimination on the basis of sex should make it explicit that such discrimination is illegal and punishable by law, including issues related to the labour market. This also implies that employers - both from the private or public sector - can be made accountable for discriminatory acts towards their employees. In addition to specific anti-discrimination laws, equality/anti-discrimination clauses can be contained in other specialized laws, such as labour laws or social laws.
- ✓ **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, the public must be aware of them. Often, average citizens may not know of existing legislation (particularly during a period 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 such discrimination is to succeed. As

⁴³ For example, Austria and other EC Member States.

⁴⁴ For example, Bosnia and Herzegovina, Albania, Moldova, Kosovo.

we have mentioned before, 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, but it is also necessary to raise awareness of the negative social and economic consequences that gender stereotyping can produce.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Existence of labour 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 such labour 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
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

VI. Working Conditions and Family-Friendly Policies

What is the Issue? What is the Goal?

Linked to the idea of gainful work, the quality of one's employment can be as important as whether or not one is employed. Quality can be partially determined by the conditions under which people are employed. Wages, 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.

While "good quality" employment means that working hours are not too long (or longer than stipulated by law) or that compulsory overtime is not excessive (thus encroaching upon other spheres of life), at the same time too few working hours may lead to "underemployment." Specifically, discrimination occurs when the individual's willingness and availability to work full-time is not considered and acknowledged by the employer. Evidence and available data show that women spend less time at their paid jobs than do men, while at the same time more women than men would like, and are available, to work more hours than their current jobs allow.⁴⁵ There is also an indication that men spend too many hours in paid jobs, resulting in a lack of time for family life, which is something that should also be more adequately managed. There are a variety of reasons for such tendencies, which may include discrimination against women in the workplace, women's predominance in part-time and casual work, and attitudes and policies that place different expectations and demands on men and women both within the workplace and family sphere.

However, all this does not mean that labour flexibility is necessarily bad. A flexible working schedule is a valid concept and should be encouraged when it is an individual choice. Together with other factors, it helps the expansion of employment.

BOX: Effective Use of Time at Work

A study comparing male and female management styles revealed that men spared little time for non-work related activities, while female managers made more time for other non-work related responsibilities.⁴⁶ While this gender difference is not a direct result of any policy, it likely stems from women's double burden (i.e., responsibilities for unpaid reproductive work in addition to paid employment/economic activity). However, work schedules that reduce late night or weekend meetings, for example, are an effective and productive way to reduce the amount of time that men spend in the workplace.⁴⁷ In addition, the corporate work ethic, as the recent high-profile anti-discrimination cases in international finance have shown, must also include rules that allow men and women to compete evenly.

⁴⁵ Elder and Johnson (1999), p. 463, and a study by the European Foundation for the Improvement of Living and Working Conditions of the accession countries in 2003 based on a survey carried out in 2001 found that "working hours are considerably longer than in the EU: workers in the acceding and candidate countries, particularly women, have longer working days and weeks part-time work is less widespread in the acceding and candidate countries than in the EU and is distributed equally between men and women [and] 'atypical' forms of work such as night work or shift work are more widespread." Paoli and Parent-Thirion (2003), p. 45.

⁴⁶ Hegelsen (1990) as cited in Claes (1999), p. 441.

⁴⁷ Recent studies show that "presenteeism" is much more expensive for firms than absenteeism and that conflict between work and family life need to be further investigated in relation to this phenomenon, Hemp (2004), Lowe (2006).

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 (e.g., to care for sick children, to attend school events, etc).
- Responsibility of the workplace to provide concrete support to families in the form of child-care (crèche) facilities, maternity and paternity leave, and many other measures that need to become available to all workers.⁴⁸

Job-Security and Benefits: Transition from a local economy to a globalized, knowledge-based economy has meant profound changes in working conditions, including the increase of part-time and limited contractual work in place of stable, full-time work. In addition, people nowadays also switch jobs more frequently. Although these changes have brought many benefits in regard to reconciliation of work and family responsibilities, they have also contributed to a sharp decrease in job security. Additionally, these shifts may mean a loss of benefits (present and future) 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.⁴⁹ These types of salaried work offer less job security and fewer benefits; but workers, and women in particular, might be disempowered to fight for changes. The development of quality part-time work should thus be included as a policy objective, taking into account that balancing employer and employee needs will also lead to better quality of both work and family life.⁵⁰

Another important point is maternity leave and its optimal length. Extensive maternity leave arrangements have been found to be a negative factor in the career advancement of women.⁵¹ This can be partly explained by long absences from the labour market and real or perceived loss of skills—something similar to long-term unemployment. On the other hand, an overly short maternity leave negatively influences family life and places many constraints on mothers. Thus, a balance here is needed in the form of an implicit contract among parent, employer, and state that delivers both competitiveness and sound parenting and involves better child care facilities, flexibility, and other family-friendly policies. One negative example from the region is the case of Poland, where maternity leave was reduced but was not adequately supported with an additional investment in child-care, which is the main obstacle facing women who are trying to balance work and family life. In addition, it is important that opportunities for men to take parental leave are created as well. Ideally parents should be able to choose who should and how to take advantage of parental leave (maternity/paternity leave).

The goal here is two-fold:

- To enhance the ability of men and women to balance productive labour with reproductive labour through the **promotion of family-friendly work environments**.
- To ensure **equality** between men and women in terms of **quality of employment** through state policy and other interventions.

⁴⁸ There are at least 38 different measures that firms can introduce to improve reconciliation of work and family life. These can be grouped widely into the following seven areas: 1) time flexibility; 2) leave flexibility; 3) flexibility in the place of work; 4) personal services (such as crèches, but can also include subsidies to workers for private crèches or home help, and also for dependent adults); 5) job adaptation; 6) professional and personal support and counselling; and 7) social benefits that complement those obtained through the public social protection system.

⁴⁹ Elder and Johnson (1999), pp. 454-456.

⁵⁰ See Rubery *et al* (2005) *The changing employment relationship and the implications for quality part-time work*.

⁵¹ In recent work by the OECD we find that: "Taking parental leave for an extended period may also deteriorate labour market skills, and damage future career paths and earnings" (Edin and Gustavsson, 2001). There is some evidence that very long parental leaves make it more difficult for women to return to the labour market, Ondrich *et al.* (1998). The problem is more acute when the parental leave is not accompanied by a job-guarantee, and the mothers are low-skilled. Ruhm (1998) also finds evidence that extended parental leaves have a negative impact on the salary of returning mothers. In marked contrast, a recent Danish survey reports a (progressive) catch-up of mothers' salary to those of childless women, as they compensate for their lack of capital accumulation, Gupta and Smith (2002)" in Jaumotte, 2003, p. 11).

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) have greatly contributed to falling levels of gender-based occupational segregation.⁵² This leads to a more efficient labour market.

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

Indeed, the efficiency argument can go even further when one considers that the bringing up of children leads to the future accumulation of human capital, which is a pre-condition for growth and development. For this reason, public provision and pro-family policies offer good value and should be stimulated.

Chain Reaction: Less job security means less sustainable livelihoods. If one sex (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 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.⁵³ In other words, without attention to family-friendly policies that address the necessity of care, equality within the labour market will remain elusive.

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.
- ✓ **Dissemination of good practices by firms in the region applying family-friendly policies:** This is one of the best ways that firms can learn how changes to their work organizations and styles can actually increase productivity and profits.

⁵² Melkas and Anker (1998), p. 97.

⁵³ Plantenga and Hansen (1999), p. 378.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Percent of private sector employers 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
Available places in nurseries/ kindergartens per child	National	The level of state help in social care to working mothers	The quality of services provided	Time-use surveys
If it exists, percent 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 the general public.	Precise barriers to effectiveness	Survey

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Macroeconomics and Trade

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Macroeconomics and Trade

This Gender Brief examines ways to mainstream gender into macroeconomic and trade policies. Macroeconomic policies to a large extent set the “tone” and overall direction of public policy through regulating its fiscal envelope. Therefore, progress made at the macro level in the gender context will greatly assist in mainstreaming gender into the policies of line ministries and specific sectors. This brief begins by examining the objectives of macroeconomic policy; goes on to address the issues of reproductive labour and gender-responsive budgeting; and concludes with a subchapter on gender and trade and trade liberalization policies.

I. Objectives and Justification of Macroeconomic Policy

What is the Issue? What is the Goal?

There are four major macroeconomic objectives:

- Sustainable economic growth
- Full employment of resources (low unemployment)
- Low inflation (price stability)
- Equilibrium in balance of payments

In short, the goal of macroeconomic policy is to enable economic growth based on full employment and price stability.

Recently, another objective of macroeconomic policy—income redistribution—has become important for policy makers. Human development is increasingly recognized as an overarching policy goal of nations, which has led to a social justice dimension (including the reduction of poverty and gender inequality) to macroeconomics. The idea is that greater social justice is achieved when wealth is distributed to all segments of the population, from the rich to those in need. There have also been calls to democratize the decision-making process around macroeconomic policy, in particular referring to budgeting.¹

At the same time, it has been recognized that macroeconomic policies are not “gender blind”: Even if they do not address gender issues directly, macroeconomic policies still may bring gender-differentiated outcomes at the macro, meso and micro-levels. Means of integrating gender and social justice issues, however, require long-term investments and commitments by policy makers, and even a shift in the way macroeconomics is approached. To date, mainstream macroeconomic analysis has failed to integrate the basic relations underlying social reproduction. For instance, reproductive (i.e., unpaid) work performed by women or the sectoral distribution of reproductive work are taken as given, and as never-changing, in modelling and policy analysis. Attempts to include gender relations into basic macroeconomic analysis² are in their infancy, only slowly changing the way macroeconomics is understood. Perhaps the area that has been most advanced in that respect is labour economics,

¹ See for example the work by the International Budget Project, which includes many initiatives in the Europe and CIS region (www.internationalbudget.org), and OECD (2001).

² Elson and Çağatay (2000) and Waring (1998).

while the largest part of the research currently being done is on the links between gender relations and the tax-benefit systems at both the macro and micro-economic level.³

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 economic development concerns, and that the human dimension must “address fundamental long-term issues of the structures, scope, and substance of societal development.”⁴ Despite poor evidence of the translation of this ideal into action thus far, this mandate should be referred to in arguments for a more gender mainstreamed approach to macroeconomic policy, especially where World Bank resources and inputs are concerned.

Despite being fairly gender progressive in comparison with other programmes, another World Bank-sponsored initiative, the Poverty Reduction Strategy Paper (PRSP) processes in different countries in the region, has yet to address gender concerns in a comprehensive and consistent way. UNDP and other multilateral and bilateral donors have already been responsible for the inclusion of gender into the PRSP in several countries in the region,⁵ and some of these policy documents have incorporated some of the gender concerns. However, few cases exist where gender has been fully mainstreamed and gender-specific concerns included in a holistic way.

Link: See brief on Poverty.

The goals of macroeconomic policy need to be transformed to better cover the social dimension of economic growth. The soundness of macroeconomic policies should not be judged only by market-based criteria, but also in terms of whether they ultimately succeed in promoting human development, 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**.
- Second, new macroeconomic policy **targets** must be set, where measurements of success will include social justice and human rights criteria.

Why Bother?

Justice: Economic and social rights are an integral part of many major human rights treaties.⁶ 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 most often is correlated with greater economic growth. Similarly, unequal social relations are an obstacle to sustainable and high rates of

³ For a recent review and implications see Jaumotte, F (2003). For a review of the systems in the EU15 countries and how they manifest themselves at the macro and micro level see Villagomez, E, *et al* (2004).

⁴ James Wolfensohn (1999) as quoted in Elson and Çağatay (2000).

⁵ See, for example, Kyrgyzstan and Serbia in the Poverty brief.

⁶ 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 (CEDAW), European Social Charter, and Amsterdam Treaty.

growth.⁷ If economic systems explicitly or implicitly discriminate against women, human capital will be under-used and therefore economic output will be far from its potential. Thus, it follows that investment in gender equality and social justice issues at the macro-level will eliminate misallocation of resources and facilitate higher output and more stable growth, benefiting the nation as a whole. One of the links is through the transparency and accountability that governments must embark on in order to achieve gender equality and social justice goals, which can make the execution of the budget more efficient. Another, as already mentioned, is through increases in human capital and better health of all citizens, which are widely accepted as boosting growth.

Link: See brief on Labour.

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 is not automatically distributed equally to all segments of the population. Policy makers should include issues of social justice and equality as an integral dimension of macroeconomic policy, rather than as an “added bonus.” 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 belief that high growth will automatically reduce poverty and income disparities over time. Macroeconomic stability is indeed a very important goal, but the social costs that this carries must also be considered. Recent experiences have proven that lack of social protection leaves vulnerable groups increasingly exposed 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 crises and periods of economic adjustment. Attention to the rule-of law, transparency, and accountability have also been identified as crucial in making sure that these policies have the expected beneficial effects for the population, i.e., to ease the assumed social costs that the country faces in transition. The absence of these governance objectives can turn a transitional situation into a more chronic and desperate one, as witnessed in East Asia in 1997.

Link: See brief on Poverty.

BOX: The 1997 East Asian Financial Crisis and the 1998 Russian Crisis

In the aftermath of the East Asian crisis, it became clear that the social impact of macroeconomic policies must receive more attention, that formal protection for vulnerable groups must be in place, that there must 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 remain the same or even be increased during economic crises and the accompanying periods of stabilization and adjustment.⁸

Similar conclusions were made on the example of the Soviet Union and Russia. The reforms that took place after the disintegration of the Soviet Union did not instantly bring new institutions even though the old institutions had already collapsed. Also, strictness of monetary and fiscal policies caused demonetization of the economy, and the most serious result of this was the inability of employers to pay wages and benefits. Money was mostly in the hands of powerful managers who, due to their connections with the old system, succeeded in controlling a large part of the economy after the privatization process had begun. In such conditions, the poor in general

⁷ Elson and Çağatay (2000), pg. 10.

⁸ Çağatay et al. (2000), p. 9. For a wider discussion of international capital flows and their destabilizing effects on women, especially in the context of the Asian Crisis, see Singh and Zammit, (2000).

and poor women in particular were the most harshly affected. Ironically, international monetary institutions and the stabilization policies they pursued actually reinforced policies that awarded, condoned, or encouraged this behaviour.⁹

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

Chain Reaction: Macroeconomic policies often 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.

Possible Interventions and Entry Points

Given the reorientation of policy objectives that needs to be in place in order to fully integrate (mainstream) social justice and gender equality issues into 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, some individual measures can be taken to support this transformation:

- ✓ **Commission and collect research:** Develop a database of research, both from your own and other countries, that highlights the social justice and gender effects of macroeconomic policies from a qualitative and quantitative perspective. If no such research 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 referred to later.

⁹ Clarke (1997).

BOX: Who Pays for Health?

Diane Elson¹⁰ 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 care givers (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, as personal income, taxes, and social security contributions are forfeited, not to mention the depreciation of human capital, social capital, and other negative welfare effects.

- ✓ **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 gender impact assessment of the SAP as part of a wider poverty and social impact analysis. This will highlight the possible negative consequences of such a programme and serve to balance against any potential positive gains, thereby helping to decide on the correct course of action. Similarly, if a SAP has already been implemented, an ex-post gender impact assessment of its outcomes should be undertaken for the purpose of establishing “lessons learned.” The following points are especially relevant:¹¹

Link: See Gender Analysis.

1. The first stage, fiscal and financial stabilization, implies among other measures (combating inflation and trade imbalances) the reduction of public expenditure to bring it in line with shrinking public revenues (reduction of budget deficits). This involves tax increases, the reduction of subsidies to consumers and loss-making producers, cuts in expenditures on health care and education, and the reduction of social and welfare benefits. These should all be looked at from a gender perspective, in particular taking into account that it is usually women’s unpaid work and existing social networks that many times kick in as substitutes when cut backs in public services are made. This means that other, usually paid, work suffers. By this way opportunity costs are created that hamper the overall efficiency of the economy instead of increasing it.
2. The second stage of structural adjustment necessarily implies a shift from non-tradable to tradable production and the elimination of unviable economic activities under the pressure of competition: Simply put, high-cost and low-quality producers have to be removed to make way for new activities. This leads to a reduction in incomes and employment, particularly in state enterprises and the public sector. The more serious the initial structural maladjustment, the greater is the scale of the initial decline. Reforms of the social protection system to ensure that the most vulnerable are duly protected - taking into account gender differences - are of utmost importance. There is evidence in Russia, for example, that the lack of social assistance reforms left the most needy outside the system (see box, below).
3. The structural adjustment mechanism is meant to operate through widening price and income differentials as low prices and incomes drive people and resources out of declining sectors and high prices and incomes attract people to sectors with greater prospects. This necessarily implies an increase in levels of inequality as the information and human capital mobility assumptions behind the smooth operation of these transitions is usually missing or greatly hampered by a number of obstacles. An analysis of the gender balance in sectoral, occupational, and geographical terms must be made.

¹⁰ Elson (1995).

¹¹ Based and adapted from Clarke, 1997. p. 3.

Link: See brief on Labour.

For instance, a “switching effect” in the economy will be questionable unless specific attention is paid to the gendered economy. If the wages of female workers are miss-priced due to gender discrimination, then the price adjustments associated with SAP will not have the expected effect of increasing the female labour supply.

In relation to price adjustments, wider economic liberalization might cause some inflationary effects. There is a clear gendered aspect to this as well that should be considered, since women as the primary household budget holders will bear the brunt of it.

- ✓ **Dialogue with development partners:** Development partners such as UN agencies or the European Union should place human development and social justice concerns at the top of the agenda during any meetings with high-level policy makers. 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. In the case of countries seeking to enter the EU, a strategy to bring objectives in line with EU standards and policies on gender equality and equal opportunities, especially in employment policy and poverty and social exclusion policies, should be created. A good practice example is the case of Albania and the recently signed Country Programme Action Plan 2006-2010 between UNDP and the government (see box, below).

BOX: Country Programme Action Plan (CPAP) 2006-2010 between UNDP and the Government of Albania

UNDP’s support in the process of creating the CPAP is an excellent example of how to introduce gender concerns into negotiations with host governments. The effort applies to the macroeconomic policy in the country, though development policies as objectives are linked to budgetary commitments.

Gender concerns are included throughout the document. For example: The inclusion of a gender equality perspective into government planning (Outcome 1); inclusion of gender concerns into the national development agenda and making legislation more gender sensitive (Outcome 2); inclusion of women (and other groups) in the establishment of institutions and forums to support participation in policy formulation and decision making (Outcome 3); and addressing gender disparities and specific needs of women in the development of economies and social infrastructure at the local/regional level (Outcome 4) show that much work has been done to identify the entry points and specific actions that will take the CPAP forward.

In addition, through monitoring and evaluation under the Gender Mainstreaming Strategy, and through reporting under the UN Development Assistance Framework, UNDP is set to establish and utilize a set of gender-based monitoring indicators for each project.

It is also significant that the document reveals the process by which the document was created as well as the fact that it drew from other processes linked to the overall UN development strategy for the country. It is notable that the Millennium Development Goal (MDG) Task Force includes a Gender Theme Group.¹²

¹²CPAP, Albania <http://intra.undp.org.al/ext/elib/download/?id=789&name=Country%20Programme%20Action%20Plan%20%28signed%20english%29%2Epdf>

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* of macroeconomic policies and goals (IMF letters of intent), PRSP, MTEFs, any other macroeconomic policy paper
Existence of social justice and gender equality indicators (e.g. poverty level, GDI, GEM ¹³) 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 of macroeconomic policies and goals (IMF letters of intent), PRSP, MTEFs, any other macroeconomic policy papers

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

¹³ GDI – Gender-based Development Index; GEM – Gender Empowerment Measure. See *UNDP Human Development Report 1995*.

II. Reproductive Work

What is the Issue? What is the Goal?

For the purpose of economic valuation, value tends to be synonymous with market value. This has led to a separation between productive work (remunerated work) and reproductive work (unremunerated work). Reproductive work includes activities that do not have any attached market value—for example, much household and community work. As such this work remains unaccounted for in national accounting systems. The result is an underestimation of the total “product” of society, and a failure to recognize and acknowledge the contribution of those people responsible for reproductive work when formulating and executing policy. The “male breadwinner bias,”¹⁴ 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.

While it is true that men also perform unpaid work (for example, car and home repairs, which, as noted, have a higher market value), most time-use surveys point to a much longer and steadier unpaid activity by women. In all societies there tends to be a sexual division of labour that makes the activities for women more restricted to caring for dependent children and adults, in addition to meal preparation, cleaning, and other household tasks and community services (volunteer work). This creates the false impression that women are not as economically active as men when, in fact, women are doing as much as half of the productive work, plus most of the reproductive work. It is important to point out that benefits that acknowledge this work but keep women at home instead of creating incentives for their market participation can create a disempowering effect as women’s economic independence is curtailed.

Reproductive work is an important element to consider 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 accounted for. This, in turn, can lead to dramatically increased hardship at the micro level. For example, cut-backs in 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 and elderly. This increases the contribution of reproductive labourers, but fails to recognize this contribution. For those shouldering these responsibilities, this also restricts the options and potential for earnings and other activities (as well as taxing and contributions to social security) in the productive sector. As said above, the end result may likely be decreased overall efficiency, as only direct costs have been taken into account when deciding upon the budget cuts.

Link: See briefs on Labour and Health.

However, when attempting to attach value to reproductive work a problem arises, since much of it can not be measured in market terms.¹⁵ 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.

¹⁴ See Elson and Çağatay (2000), p. 16.

¹⁵ UNDP Human Development Report 1995.

*The short and long term **goal** of policy makers should thus be twofold:*

- To **acknowledge** the significance – economic and otherwise - of unpaid reproductive work.
- To **reflect** this in policy analysis and development.

Why Bother?

Justice and Quality of Life: The “male breadwinner bias” ignores the high percentage (although decreasing in the region) of women’s participation rates in the labour market and the predominance of dual-earner households. 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.

BOX: Reproductive Work and Reform in Transition Countries

In the countries of Central and Eastern Europe (CEE) and the Commonwealth of Independent States (CIS) the male breadwinner model must be measured against what the social practice is in reality: Are individual incomes pooled at the household level? Who decides on expenditure for food and basics as opposed to alcohol and other non-essentials? It is important to remember that wages and benefits in most of these countries before transition were based on individual, not family, needs. This was also the situation for the tax system. Women’s participation, although considerably decreased during transition, was and continues to remain high by Western standards. It is also important to keep in mind that before transition the state took responsibility to a large degree for dependant persons (children and adults), leaving women relatively free to work, but not entirely free of the unpaid work at home. Thus, assumptions made behind reforms and the structural adjustment and macroeconomic policy agendas should be adjusted for these facts where relevant and in particular in the case of changes to the social protection and tax systems.

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

Efficiency: The invisibility of reproductive work may hide greater inefficiency overall.¹⁶ Unless some mechanism is developed that can make reproductive work visible and can 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 that risk decreasing the overall effectiveness of the economy. In addition, misallocation of the female labour to the reproductive sphere also contributes to inefficiency.

Link: See brief on Labour

¹⁶ Çağatay. (1998), p. 9.

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, time-use needs to be measured. These surveys can and have been developed on a stand-alone basis, but labour force surveys can also incorporate questions relating to all-time use by men and women, including non-remunerated, reproductive labour.¹⁷ 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 then be prepared to 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, those stipulating direct entitlement to social security benefits and tax incentives for child care, and those determining divorce settlements) must be reviewed. Non-monetized contributions in the form of both productive and reproductive work must be recognized and adequately rewarded.
- ✓ **Acknowledging the informal market:** It is also important to take into account the large presence of the informal market in some countries of the region. This poses a series of challenges as far as enforcing legislation and collecting taxes. The heterogeneity of the informal sector and its gender dimensions must be taken into account if effective policies are to be implemented to support policies that “formalise” activities and/or workers.
- ✓ **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 make explicit the need for men to be involved in reproductive labour as well.
- ✓ **Barriers for men:** It must also be recognized that men face barriers to enter the unpaid care sector. The expectation that they be the sole breadwinners, as well as the existing policy framework that supports this model, hinders their participation. The organization of work is very much tied to such barriers. In addition, cultural stereotypes also prevent men from taking up roles that are usually designated for women. It is important to note that men who take paternity leave or become more engaged in care work can also face the same problems women do in advancing their careers. As noted in the Labour brief, the culture of ‘presenteeism’ at the work place can also have very negative consequences for an effective reconciliation of work and family life for men.

Link: See brief on Labour

¹⁷ See UNECE database for time use: www.unece.org/stats/gender/timeuse/Welcome.html.

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)

Link: See brief on Labour.

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 as 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 also reflect the priorities and values of the government, and the choices people in power make to realize their social and economic agenda.

Macroeconomic policy plays an important role in affecting living standards and economic opportunities for the population in general and women in particular. This fact is the economic rationale for introducing a gender perspective into budgets. There are costs associated with lower output, reduced development of people's capacities, less leisure, and diminished well-being when macroeconomic policy, through its different instruments (including the budget), increase inequalities instead of reducing them.¹⁸ Consequently, increasing the possibilities for those who experience inequalities to access resources and opportunities has positive economic effects, as it deals with misallocation of resources.

It is possible to assess government priorities and commitment to social aims, including gender equality, through scrutiny of the generation and use of public resources, i.e., budgets – at national, regional, and local levels. However, budgeting often takes place in a very non-transparent, non-participatory manner. The majority of ordinary citizens, including women, usually have no voice in determining how budgets are made. Even elected representatives can have limited influence on this process. This is because budgets are often considered a highly technical subject “best left to experts.” However, this ignores the significant social dimension of budgets. It cannot be said that making choices about the social development of a country is something only for “experts.”¹⁹

Furthermore, in the Europe and CIS region there are specificities of the transition that need to be taken into account when budgets are analysed from a gender perspective: privatization processes affecting the provision of basic public services such as water or electricity; the use of privatization proceeds and the continuation of the use of extra-budgetary accounts (especially in health, education, culture, and science); and quasi-fiscal activities (linked mostly with government-controlled tariffs applied by state-owned enterprises). The increase in transparency and consolidation of central budgets is indeed an opportunity to introduce Gender Responsive Budget initiatives (explained below). It also presents challenges in understanding how the current status of the system as well as changes in it will affect the situation regarding gender.²⁰

*With 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 men and women.
- Second, ensuring that the **content of budgets reflects gender equality and social justice goals**, allocating funds and generating income in ways that are socially equitable to both men and women.

¹⁸ Elson (2002); Buddlender et al. (2002).

¹⁹ These paragraphs have been adapted from Çağatay, Keklik, Lal and Lang, (2000), p. 12.

²⁰ UNECE (2004); Villagómez (2004).

Progress towards both of these goals can be accomplished through the implementation of “budget initiatives.” While many types of budget initiatives exist, their common goal is to reveal and reshape the way public funds are generated and spent.

BOX: Gender Responsive Budgeting Examples

United Kingdom: The UK Women’s Budget Group (WBG)

This group focuses mostly on taxes and benefits and less on expenditures. The most important areas of their activity are tax credits and benefits, poverty, pensions, combining employment and caring, equal pay, and productivity. Some of the main policy changes that the group influenced through effective use of in-depth application of gender analysis are:

“Giving couples the choice of receiving the Working Family Tax Credit (WFTC); allowing couples who share full-time employment hours and caring responsibilities to claim the full-time premium in the Working Tax Credit (WTC); payment of the Child Tax Credit to the main care-giver; [and taking into account the] effect on second earners in the new WTC compared with WFTC” (WBG brochure).

The group also puts forth efficiency arguments before Treasury and the other actors such as parliamentary committees, diverse government departments and the tax authority (Inland Revenue).

France: The Budget Act for 2000

Since 2000, the French government has been obliged to submit an annex to the draft Budget Act presenting the money earmarked to promote gender equality and women’s needs. Hence, this government initiative has been put into practice in the form of a detailed identification and catalogue presented by each ministerial department and through the actions and programmes that foster gender equality or enhance gender awareness. Each department was also invited to specify its gender equality guidelines and to present the equality indicators that were considered most relevant to its particular area of responsibility (French Ministry of Economy, 2001). In its sixth year running, the reports of each of the departments have progressed from describing the equal opportunity policies within the ministries or presenting programmes that target women to the analysis of impact that their expenditure has on improvement or non-improvement of gender equality goals (see web gender budget sources, below, for links to all years from 2001).

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. The Organization for Economic Cooperation and Development (OECD) has issued a number of documents dealing with budget transparency as well as supporting this as a practice among its member states and gathering information on the practice of gender budgeting.²¹

²¹ These documents can be found on the following web-links: <http://www.oilis.oecd.org/oilis/2001doc.nsf/NEWRMSENGREF?OpenView&Start=1&Count=100&Expand=21.12#21.12> - document on the questionnaire to budget officers on gender; <http://www.oecd.org/dataoecd/33/13/1905258.pdf> - best practices for budgetary transparency from the OECD; <http://www.oilis.oecd.org/oilis/2001doc.nsf/87fae4004d4fa67ac125685d005300b3/c1256985004c66e3c1256a5300380be4?OpenDocument> - for tracking budget transparency in OECD members in collaboration with the World Bank.

Accountability: The development and implementation of sound human development policies is often hampered by closed, inaccessible processes of budget allocation. Gender budget exercises or initiatives can introduce accountability and transparency into macroeconomics, compelling governments to make effective its national and international commitments to allocate funds and deliver services that enhance gender equality and support women's economic and social rights, and creating an environment whereby these commitments 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 and an analysis or monitoring of their impact is carried out.

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

Quality of Life: Gender responsive budgets lead to better targeted public spending, which implies that policy initiatives will reach those who need it most and, consequently, improve people's quality of life.

Alliances: External development partners are more willing to provide financial support to governments if public funds are managed in a transparent and accountable manner. Involvement of civil society in monitoring the budget further raises the standards of accountability and transparency.

Chain Reaction: Budgets, as a part of macroeconomic policy, reflect the values and priorities of those who formulate them. They critically affect 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.²²

Another equally important issue in this context is the budget balance. Fiscal conservatism may result in many budget constraints, including a reduction in spending for social programmes that would benefit women, among other vulnerable groups. This implies that budget deficits can also be good and stimulating for the economy, but only if they are within prudential limits. Deficit financing can act as both an automatic stabilizer and as a protector of essential provisioning. Nonetheless, budget deficits that are deeper than what is manageable create additional inflationary pressures, which strongly affect women as those most responsible for households. Thus, the question of optimal budget balance is a sensitive one and always has a consequent chain reaction.

²² Çağatay, et al. (2000), p. 5

CASE STUDY: Gender Budgets in Russia

This project run by UNIFEM aims to develop methods of gender budgeting in order to increase gender sensitivity of the government and to strengthen the decision-making role of women in Russia as participants in the budgeting process.

The project is being conducted during a period of full-scale reforms, which include fundamental changes in the budgetary-taxation relations of decentralization, including devolvement of competencies in the social sphere from the federal to regional level. Reforms in the social sphere in Russia have revealed an important problem: securing human rights for men and women throughout the Russian Federation (RF). Thus, supervision and control of budgetary flows to the regions and to different population groups by civil society, and permanent analysis and monitoring through gender budgeting methods, were considered as effective mechanisms for upholding human rights, including women's rights, for the whole RF.

The project attracted high-level experts in budgeting and gender for the development of the methodology of gender budgeting in Russia. It also allowed for meaningful cooperation among an array of partners: representatives of the executive and legislative power authorities, civil society, mass media, and the experts.

Since the start of the project in 2004 the following **key results** have been achieved:

- A methodology of gender budgeting at the federal and regional levels was elaborated, taking into account the changes made to the budgetary code in the context of decentralization.
- For the first time in Russia, gender analysis of federal and regional (Komi Republic) budgets, and gender analysis of the set of laws influencing budgetary policy decisions, were conducted together. These laws include: the law on '*Minimum wage rate*'; the law on '*State allowances to citizens having children*'; and the law on '*Budget of the Federal Fund for compulsory medical insurance*.'
- In addition, a large number of recommendations were submitted for consideration to the Government of the Russian Federation, and several amendments were approved at the local and regional level.

These recommendations represent the redistribution of approximately 50,000 million roubles (USD1.8 billion) in the federal budget to cover expenditures on gender-responsive measures, including measures for increasing the minimum wage rate; increasing the wage rate in the social sectors (health, education, culture), where women are in the majority; increasing allowances for children; and increasing the tax exemptions of families with children, among others.

UNIFEM CIS

Possible Interventions and Entry Points

- ✓ **Budget Initiatives:**²³ Gender budget initiatives are policies or actions with an explicit focus on national or local level public expenditures and/or revenues from a gender perspective in order to constitute a budget exercise. Analysis can be of two types:

²³ Adapted from Çağatay, et al. (2000). For more information on practical implementation of budget initiatives, see also Adelstal (1998) and Budlender, et al. (1998). More recent work and the results of the UNIFEM global initiative can be found in: www.gender-budgets.org.

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 principles** – Is the initiative guided by a gender equality mandate, a pro-poor mandate, both, or something else? It is important in this case to keep in mind two principles that distinguish gender budget analysis from other forms of analysis: assessment on an individual as well as a household basis and systematic recognition of the contribution of unpaid care work.²⁴
- **Focus** – Does the initiative look at expenditures, revenues, or both?
- **Outputs** – Will the initiative produce an impact analysis, alternative budget proposals and recommendations, or 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 actors, nongovernmental 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, France,²⁵ and South Africa, for example, have implemented gender budget 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.

Regional or local: In the context of decentralization, budget initiatives are particularly helpful for introducing transparency and accountability into decentralized expenditure and revenue collection processes. There is a growing number of examples at the regional and local level in Europe,²⁶ which also point to the need to develop other tools of impact and analysis that are more adequate at this level of government. Also, in the Europe and CIS region and in the context of decentralization processes, municipalities that have already introduced participatory mechanisms and evaluation practices of the budget (user satisfaction surveys, for example) can in principle more easily incorporate a gender perspective.

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.

²⁴ Diane Elson (2002).

²⁵ Since (2001) this has been done in France through a law that requires all ministries to present the budget with an impact assessment. For the latest, go to: <http://alizer.finances.gouv.fr/budget/plf2006/jaunes/pdf/811.pdf>

²⁶ Villagómez (2004).

- Demonstration of how public budgets can be made responsive to the needs of both sexes 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.

BOX: Gender Responsive Budgeting Tools

Diane Elson ²⁷ has identified six tools for integrating gender issues into an assessment of public expenditure. Note that these tools are based on those already commonly used within budgeting departments to prepare, implement, or monitor budgets, except for tool number 5, which uses time-survey data and is directly related to unpaid work:

- 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:** analyzes 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.

Measuring Progress

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

²⁷ Elson and Keklik, (2000), *Progress of the World's Women*, UNIFEM, pp. 116-117.

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)	Percent of public funds that go specifically towards gender equality	"Mainstreamed" expenditures will not be measured here, although they may target gender equality	National, regional or local budget
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		-Civil society or government technical papers -Legislation requiring a gender impact assessment of all laws, including the budget bill (gender sensitive budget exercises)
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 parliamentary budget committee meetings -Monitoring reports on the implementation of the budget by civil society

IV. Trade Liberalization

What is the Issue? What is the Goal?

Trade liberalization does not have to support 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. Moreover, just as in the case of general macroeconomic policies, trade liberalization tends to be gender blind or, put differently, it is certainly not gender neutral.

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

Shifting the burden of social reproduction: Free trade policies usually mean that tariffs and licensing fees will be either reduced or eliminated. This means that a decrease in government revenue is likely to follow in the short to medium-run. Governments must therefore look for ways to make up for lost revenue – usually by increasing domestic taxes (especially indirect 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).²⁸

While it is true that trade liberalization is expected to increase employment as export-led sectors are developed, and economic inefficiencies are eliminated through higher competition, adequate levels of employment are not generated quickly enough to compensate for the unemployment created (and/or sufficient re-training policies are not put into place). This might be one reason for the emergence of informal market activities or undeclared work activities as survival responses of individuals and households, which affect men and women in different ways. Informal market activities can to some degree also be identified as a product of the lack of implementation and timing of other reforms to promote SMEs. In both cases, tax collection is also clearly limited. Furthermore, in some cases export-led sectors are developed on the basis of cheap labour and other concessions to investors that also limit tax collection.²⁹ Dynamic economic analysis is needed to measure to what extent theoretical benefits of unfettered trade have materialized and whether the assumptions behind them are realistic. Analysis is also needed to identify the obstacles that limit their full benefits, including timing and implementation of other reforms.

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, for example “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 tend to rely on cheap female labour.

On the one hand, competitive pressure on exporting sectors brings about changes in work organization practices. If unchecked, these practices can be negative as working conditions deteriorate following a cost-cutting rationale, even when actual salaries might be larger in the short-run and future benefits forfeited.³⁰ On the other hand, these changes can bring about opportunities for women and youth who, because of their life-cycle needs, might be more willing to take up temporary and part-

²⁸ WIDE Resources on Gender and Trade.

²⁹ In the EU context, countries with the highest taxation have the highest female participation rates, namely the Nordic countries. The higher taxation is used, among other things, to maintain the publicly provided or privately subsidized care for dependent persons. In these countries the reproductive roles of women have been factored into macroeconomic policy-making.

³⁰ See World Bank (2001), pp. 198-203.

time work and who predominate in the least regulated sectors. However, this should not come into conflict with ensuring that work conditions meet minimum safety standards and that temporary work is balanced with some degree of job security (see ILO recommendations and research on “flex-security”³¹).

Link: See brief on 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 occupations, 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 investment: Trade liberalization is also likely to bring increases in foreign direct investment (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.

On the other hand, FDI and international trade can represent an opportunity for improving gender equality outcomes at the workplace as international suppliers increasingly pressure their supply chain providers in developing countries to adhere to certain ethical standards. The pressure on FDI and international trade comes from consumers worldwide as they become more aware of the indecent work practices behind the products they buy. Again, work organization practices that include more family-friendly policies can greatly enhance the work-life balance and set standards for national firms.

Trade liberalization can also bring great benefits, both in terms of growth and gender equality. Like other macroeconomic policies, trade policies are tools that must be used appropriately in order to yield results that benefit the country.

On the other hand, trade liberalization is not likely to be successful without greater gender equity. Trade liberalization should bring competition and sound conditions to the economy, but all this will not be possible with a strong gender bias in economic relations. If the allocation problem is not adequately solved at the level of the entire economy, that might lead to the failure of the whole trade liberalization concept and its benefits.

Link: See brief on Labour.

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

- To ensure 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.
- To help policy makers acknowledge the existence of the wider economic issue of labour misallocation within the concept of trade liberalization.

³¹ See ILO paper on decent work, including issues of flex-security at: <http://www.ilo.org/public/english/bureau/integration/decent/publicat.htm>.

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.³²

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, as described above.

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.

The research questions that might be considered are:³³

- How do international trade agreements and, hence, national trade policies based on these agreements, shape and re-shape the time burden for men and women, their access to essential services - critical to social reproduction - as well as access to employment?
- What are the potential and actual effects on men and women at the micro, meso, and macro levels of the economy as a result of directional shifts in trade policy?
- How does trade liberalization affect and relate to industrial and fiscal policy and/or poverty reduction initiatives?
- As a result of trade liberalization, what new opportunities and new areas of involvement (created directly or indirectly) are available to men and women in the formal, informal, and household sector? Specifically:
 - What assets, skills, and training are required for successful involvement in these?
 - How are men and women positioned to take advantage of them?
 - Are the responses of men and women likely to be similar or different?
 - What are the particular challenges and constraints faced by men and women?

³² See, for example, Kvedaras (2005)

³³ Taken from, Williams (2006)

- ✓ **Monitor enforcement of pro-gender equality legislation:** Policy makers should try to ensure the incorporation of national equal opportunity 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.³⁴
- ✓ **Apply a gender perspective to technical assistance:** Governments and multilateral 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 men and women.³⁵
- ✓ **Encourage a gender perspective in foreign direct investment (FDI):** Similarly, governments should encourage investors to invest equally in skills-building and opportunities enhancement for 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. One way to encourage this might be to present Reconciliation of Work and Family Life awards or Equal Opportunities awards to firms.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Rate of women working for export-led industries (disaggregated by age and occupation)	National	The extent to which trade liberalization is affecting women's employment and vulnerability in case of exchange rate or other financial crisis affecting activity where women work		Labour force survey
Index or separate indicators on conditions of work (i.e., wages, social protection data, hours, types of contracts, etc.).	National	Conditions of work	Informal market activity if the survey is not adapted to its presence	Labour force survey

³⁴ WIDE Resources on Gender and Trade.

³⁵ Ibid.

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Private Sector Development

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Private Sector Development

This section examines gender mainstreaming in the context of private sector development, focusing on entrepreneurship and small- and medium-sized enterprises (SMEs). It addresses gender equality in terms of private sector development and economic policy, gender based constraints in the legal and regulatory framework of SMEs, and obstacles that women entrepreneurs face in accessing finance and markets.

I. Economic Policy and Private Sector Development

What is the Issue? What is the Goal?

The development of the private sector, including the promotion of entrepreneurship and small- and medium-sized enterprises (SMEs)¹, has been a principal element of economic policy in the Europe and CIS region. Economic and private sector development policies have been closely linked to the process of joining Western institutions, such as the European Union, and to competing in the global market place. In order to accomplish these objectives, donors have helped governments to adjust national legislation, to liberalize both domestic and international trade, to increase the divestiture of state-owned enterprises (privatization), and to build an institutional and policy framework to support the development of the private sector. In addition, donors have advocated private sector engagements such as the UN's Global Compact, designed to promote responsible corporate citizenship, and UNDP's Growing Sustainable Business initiative, which facilitates business-led enterprise solutions.²

While private sector economic development policies aim to be affecting men and women equally, they tend to be "gender blind" (affecting men and women differently). In addition, where gender inequalities are reinforced through policy, legislation, or practice, there are market distortions relating to the participation of men and women in private sector development.

Since the development of SMEs is vital for job creation, private sector development, and economic growth, it is important for governments to have an SME development strategy that is linked to their macro-economic policy. Positioning SME development policy against national targets makes it easier to coordinate activities of different ministries and to prioritize goals. Specific objectives can be set regarding SME contributions to poverty reduction, job creation, the welfare of specific groups (including women), or major sector targets, such as agriculture or tourism.³

It is also important to develop an SME development strategy that includes lessons learned. Despite good levels of education and high participation in the labour market, women are two times less likely than men to become entrepreneurs.⁴ An important lesson is that the gender gap in entrepre-

¹ SME in this brief refers to micro-, small-, and medium-sized enterprises. Definitions vary by country. For simplification, the definition used here is based on the number of employees of a company: micro (1-10), small (11-100), and medium (101-250). For specific information on how each country in the region defines SME, see (UNECE 2003).

² For more information on these initiatives see www.unglobalcompact.org and www.undp.org/business/gsb.

³ For more information on policy setting, see Gibb (2004), chapter 2.

⁴ UNECE (2002) p. 15.

neurship is seen in all countries regardless of the scale of the SME sector. In terms of gender mainstreaming, the goal of economic policy in private sector development should be the promotion of SME policies that support gender equality.

Where there is evidence of inequality of outcomes, mainstreaming a gender sensitive approach to SME policy also involves including women as a specific target group and reflecting the needs of women entrepreneurs⁵ in that policy. For example, promoting equal opportunity in the labour market and equal access to financing are two key policy issues.

Link: See the Gender Brief on Labour

Why Bother?

Justice and Equality: Many countries have ratified international treaties relating to the prevention and elimination of discrimination, including the UN Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and various International Labour Organization (ILO) conventions on equal labour rights for men and women. In addition, the Millennium Declaration, signed in September 2000, commits member countries to “promote gender equality and empowerment of women.”⁶ Governments can help fulfil these international obligations by including gender equality in economic and SME policies.

Efficiency and Sustainability: Investment in gender equality at the SME policy level will facilitate private sector development and contribute to economic growth. Women own approximately a third of new enterprises in the Europe and CIS region⁷, and are a major but often unrecognized contributor to SME growth. For example, in family-owned businesses men are usually listed as the primary owner. Under-representation of women in this sector also means that talent of the potential women entrepreneurs has not been adequately utilized, which has its effect on efficiency and economic growth.

Alliances: Many countries have development partnerships with international organizations, such as the United Nations, which mandate increased attention to gender equality. For countries trying to join the European Union, there is an additional incentive to promote gender equality in economic and SME policies in order to be able to meet the requirements for membership.

Possible Interventions and Entry Points

- ✓ **Establish processes for mainstreaming gender into SME ministries/agencies:** Establish a gender working group to serve as a coordinating body to promote gender issues in the agency or ministry responsible for private sector development (PSD) and SME policies; provide gender-sensitive training for ministry or agency staff as well as for service providers in government institutions, such as small business development agencies; and set concrete targets for women’s participation in policies and programmes implemented by SME agencies. If SME reports from

⁵ According to the Organization for Economic Cooperation and Development (OECD), there is no internationally recognized definition for entrepreneurship and, as a result, a “women entrepreneur” can refer to someone who has started a one-woman business, to someone who is a principal in a family business or partnership, or to someone who is a shareholder in a publicly held company that she runs.

⁶ World Bank (2003) p. 3.

⁷ UNECE (2002) p. 26.

these agencies do not include gender analysis, develop indicators and propose their inclusion in SME reports. Changes in SME development should be tracked and compared to socio-economic situations amongst different groups such as men and women. Results can be used to formulate arguments for integrating gender into SME policies.

- ✓ **Participate in/establish donor coordination on gender:** Consult with development partners working on economic development projects in your country who have gender programmes and gender mainstreaming mandates – for example, the World Bank, UNDP, European Union, and USAID. They can share their expertise and provide data and arguments for including gender equality in PSD and SME policies.
- ✓ **Encourage gender impact monitoring of PSD and SME policy and programme interventions at all levels of government (national, regional, and local):** While SME policies are often formulated at the national level, and in theory are based on equal opportunities for men and women, implementation is carried out at the regional and local level. It is during the implementation phase that gender discrimination can occur, which leads to gender-differentiated outcomes. Gender monitoring at all levels of government can help address gender inequalities that may arise during implementation.

Measuring Progress

INDICATOR	Level of Measurement	What does it measure?	What does it not measure?	Source of Information
Existence of gender equality issues in a national strategy for private sector development (e.g., National SME Strategy)	National	Degree of political will to integrate gender issues into PSD policy	Commitment to implementation	Survey/ Desk review of national strategy documents
Existence of government strategic plans (land reform, privatization) that address gender-related constraints	National	Degree to which gender issues are used to judge soundness of SME action plans	Commitment to implementation	Survey /Desk review of government documents
Percentage of government budget and/or donor funding for PSD projects that target women	National	Commitment to implementation of gender specific PSD interventions	Results of interventions	Audit of government budget and donor support

II. Legal and Regulatory Framework

What is the Issue? What is the Goal?

Laws and regulations governing the marketplace must create incentives, rather than barriers, to entering, working in, and exiting from the marketplace. In order to grow, SMEs need laws and regulations that promote competition and reduce transaction costs. Rules and regulations, if excessively complex or incorrectly applied, can turn into significant barriers for SMEs and hamper business growth. While each country has its own set of challenges, major obstacles to SME growth in the Europe and CIS region include issues of taxation, land registration and ownership, impediments to business start-up, and privatization. Both men and women entrepreneurs face these challenges, but women entrepreneurs have the additional challenge of overcoming gender-specific barriers. These barriers are outlined below. In addition, the role of the informal economy, where women are over-represented, needs to be included in the legal and regulatory framework.

High tax rates and complex tax administration are a significant constraint for SMEs and can lead them to the informal sector if the tax burden is too excessive. If government taxation or illegal taxation (through corruption) takes all the profit, SMEs can not grow. SMEs often expand their business using financing from retained earnings. In many countries women are more vulnerable to offences such as extortion or racketeering.⁸

Barriers in the land market are high in many countries. If the process is too arduous it discourages entrepreneurs from formally purchasing or registering land. This hinders access to resources necessary to start and expand businesses, as land is often used as collateral in securing loans. Despite formal equality in property ownership laws, traditional patterns of male property ownership and inheritance persist, making it more difficult for women entrepreneurs. If property is inherited by the nearest male relative, rather than the wife or female dependants, then the economic opportunities for women are decreased. They can not sell the property for profit or use it as collateral in a loan.

CASE STUDY: Tajikistan: Women's Rights to Land

In Tajikistan, "Women's Rights to Land"—a project of the United Nations Development Fund for Women (UNIFEM)—resulted in the acceptance by the parliament in February 2004 of four amendments to the Land Code. The amendments mainly relate to women's rights and access to land resources. The following changes were introduced:

- Article 71: Amended article states that each family has a right to receive an allotment. The amendment allows for greater ease in establishing the order of property rights and management. Previously, each farmstead got an allotment, but in reality one farmstead was shared between several families. It was nearly impossible to track and manage the rights of property and/or right of possession.
- Article 17, clause A: Amended article states that all members of a family, including women, will receive a Land Use Certificate (LUC) in addition to the General LUC that is given to a head of the family, and the settled land share of the family will be vested to women and girls of each individual family. Previously, if a head of a family received the LUC, neither women nor their children received documents certifying their rights for land shares within the family.

⁸ Ibid, p. 19.

- Articles 67-69 were excluded from the amended Land Code. These articles stated that former collective land should be distributed among permanent and full members of kolkhozes. Women who were on maternity leave or were not members of a certain kolkhoz were excluded from the land distribution process.
- Article 66 was edited to substitute Articles 67-69, and its new version states that all citizens of the republic have equal rights in receiving their land shares.

UNIFEM CIS

Due to traditional attitudes about gender roles and the double burden of work and family responsibilities, women are often discouraged even further from starting a business. Traditional attitudes include the idea that business is the sphere of men and that women are relegated to social services. The labour market has become increasingly segregated by sex. Female-dominated sectors are often in the public sector, while male dominated sectors tend to be in the private sector. With wages in the public sector generally lower than wages in the private sector, these attitudes contribute to the gender gap in income.

During the **privatization process of state-owned enterprises**, many of the assets ended up in the hands of former top management. Since the top management was overwhelmingly male, the majority of assets went to men. A strong gender bias of the privatization process has led to an uneven distribution of assets, thus negatively affecting economic opportunities for women. With fewer assets to start or maintain a business, women were left behind during the initial stages of economic transition, and that gap continues to grow. Women have entered business, but overwhelmingly at the micro level as a means of economic survival.

While both men and women lost jobs during the privatization of state-owned companies, women have been hit particularly hard given the economic sectors in which they have been concentrated. As the privatization process continues, women who are strongly represented in public sector fields (education, healthcare, public administration, social services) are likely to continue losing jobs. Although there are job opportunities for private sector employment, women face obstacles. Older women face gender bias in recruitment practices of private employers, while younger women, who are preferred in private sector jobs, face sexual harassment.⁹

The **informal sector** of the economy¹⁰ across the Europe and CIS region is quite large (ranging from 15 to 50 percent of GDP). Over half of those employed in the informal economy are women.¹¹ Economic activities include unregistered micro and small businesses that conduct street vending (selling home products or trading purchased goods), cross-border suitcase trading (food products, textiles, household goods), personal and social services (tutoring, child care), and sub-contracting work (usually home-based). While there is debate as to the causes of women's entry into informal work arrangements (ranging from lack of opportunities in the formal sector to the need to support substandard wages to the loss of state-sponsored child care facilities), the key issue regarding the legal and regulatory framework is that the informal sector lacks social and legal protection and is not subject to national taxation policies. The needs of participants in the informal economy should be included in the legal and regulatory framework.

⁹ For more information see Esim (2002).

¹⁰ The international definitions for the informal sector include small and unregistered enterprises, paid and unpaid workers in these enterprises, and casual workers without fixed employers. For full details, see publications of the International Labour Organization, available at: www.ilo.org.

¹¹ It is difficult to determine the exact size of the informal economy. Statistics vary depending on the sources used. For more information, see publications of the Women in Informal Employment Global Organizing Network (WIEGO), available at: www.wiego.org.

Link: See also gender briefs on Labour and Macroeconomics

In order to promote an enabling legal and regulatory environment for SMEs both in the formal and informal economy, there needs to be a public-private sector dialogue. It is important to develop private sector capacity to lobby governments. Key actors include business associations and think tanks. Business associations can lobby governments for reforms; think tanks can analyze constraints to and opportunities for growth of SMEs and disseminate results and facilitate public debate about the issues. Gender issues affecting SMEs, such as gender specific barriers to starting a business (noted above), need to be included in this dialogue. Thus, there is space for women's groups and women's business associations to become active in the process.

Therefore, the goal is to

- **Include gender issues in the public-private** dialogue focused on promoting an enabling legal and regulatory environment for SMEs in the formal and informal economy.
- **Support of women entrepreneurs as well as gender-sensitive employment policies.**

Why Bother?

Efficiency and Sustainability: Studies have highlighted the active role women play in SME growth and development. However, women are often disadvantaged by local customs or legalities that make it more difficult for them than for men to access resources to develop their business. By promoting gender issues in laws and regulations governing business, governments can address inequalities and, as a result, benefit from economic contributions made by both men and women. This, in turn, boosts the number and quality of SMEs, their competitiveness, and overall employment levels.

BOX: Accessing Economic Resources: Land Ownership Rights in Kyrgyzstan

Although men and women are guaranteed equal land ownership rights by the Kyrgyz legal system, many factors inhibit women's access to land—notably, the dominance of common law over the official legal code concerning land and private property; flawed laws of succession, sale, and purchase of land; and limited information about women's economic rights to property and land. As part of a strategy for supporting women's entrepreneurial initiatives and helping them to access economic resources, the Women Entrepreneurs Support Association (WESA) launched a project in 2002 on women's land rights. Project collaborators include UNIFEM, other national women's NGOs, local government agencies, and the media. WESA experts travel to villages with written materials about land rights; they broadcast advice on land issues in Russian and the Kyrgyz language on radio programs; and they have established a network of local trainers. Documents about land rights have been published and are available in Russian on the UNIFEM website. To date over 10,000 women have received legal advice and assistance. WESA has also developed a series of gender indicators that will help them to develop a fuller picture of women's knowledge of their economic rights. Gender-disaggregated data is also being collected about the distribution of land during land reform.¹²

Accountability and Credibility: As women often make up more than half of the population and are becoming increasingly involved in business, any data or policy that does not address both genders

¹² Adapted from *Presentation at the Second UNECE Forum of Women Entrepreneurs in 2003*, by Gulnara Baimambetova, Available at: www.unece.org/ie/entrp/women/program.htm.

equally is flawed. Using gender analysis in developing legal and regulatory reform can improve credibility.

Quality of Life: Women's business associations have taken the lead across much of the Europe and CIS region by providing women entrepreneurs with services and resources and advocating their interests at the policy level. As critical barriers, such as inequalities in property rights and the influence of traditional gender roles, are addressed, women entrepreneurship can increase. With increased opportunities for income, the quality of life for families and children will improve.

Chain Reaction: A gender sensitive legal and regulatory framework can provide incentives for changes at the micro or enterprise level. If there are equal opportunity employment laws, then SMEs will need to include sexual harassment and sex discrimination policies in their employment practices.

Possible Interventions and Entry Points

- ✓ **Conduct an inventory of legislative and bureaucratic impediments to SME development that includes gender analysis:** This survey should include a review of licensing and registration rules and procedures, property laws, and taxation issues. In order to measure improvements over time, the survey should be repeated annually. The World Bank's annual "Doing Business Survey" is an excellent source of information on indicators (see below). Men and women should be compared through these indicators. Once the data is analyzed, disseminate it to relevant stakeholders.

BOX: World Bank Indicators: Doing Business in 2006

This report is the third in a series of annual reports investigating the scope and manner of regulations that enhance business activity and those that constrain it. Quantitative indicators on business regulations and their enforcement can be compared across 150 countries and over time. It presents indicators in nine topics: 1) starting a business, 2) hiring and firing workers, 3) registering property, 4) getting credit, 5) protecting investors, 6) enforcing contracts, 7) closing a business, 8) paying taxes, and 9) trading across borders.

The indicators are used to analyze economic and social outcomes, such as productivity, investment, informality, corruption, unemployment, and poverty, and to identify what reforms have worked, where, and why. Sample indicators (disaggregated by sex) include:

- Starting a Business: # procedures, # days, and cost (% income per capita)
- Registering Property: # procedures, # days, and cost (% property value)
- Paying Taxes: # payments, # days to prepare, and total tax payable (% gross profit)¹³

- ✓ **Develop and strengthen linkages among stakeholders who work with female entrepreneurs:** Encourage partnerships and dialogue among chambers of commerce, local branches of public employment services, women's NGOs and women's business associations. A good example is World Learning's STAR Network, which has worked in the post-Yugoslav countries creating initiatives to support women's self-employment and enterprise development.¹⁴

¹³ Adapted from www.doingbusiness.org.

¹⁴ For more information, see www.worldlearning.org/star.

- ✓ **Support the capacity building of women's business associations:** Business associations lobby on behalf of their members for laws and regulations that encourage growth. Access to information and networks is a challenge for women, who have less time for networking, due to family and household duties, and who typically lack access to traditional, male-dominated business networks. Work with development partners to improve the capacity of women's business associations so that gender-related impediments to business can be addressed. It is also important to encourage associations to include women working in both the formal and informal economy. The capacity and effectiveness of associations can also be increased through regional initiatives and coordination.

BOX: Regional Coalition of Women's Business Associations in the Balkans

The Centre for Private Enterprise (CIPE) of Romania organized a conference in 2005 that brought together 24 women's business associations from 12 Balkan countries. The Conference of Balkan Women's Business Associations was an essential step towards achieving the goal of a project entitled: "Establishing a regional coalition of women's business associations in the Balkans." The project aims to create a regional network of women's business groups that can actively promote a legislative agenda that improves both the status of women entrepreneurs and the overall business environment. Following the conference, CIPE Romania prepared a report highlighting the future coalition's mission, goals, and objectives. An e-conference will be held in 2006 at which time association members will take the next step to formalize the coalition structure.¹⁵

- ✓ **Establish a gender working group in professional and trade associations:** Many associations are organized according to industry sectors (manufacturing, services, agriculture) or professions (accountants, lawyers). Encourage association leaders and members to start a gender working group that can promote gender issues in a specific industry or profession.
- ✓ **Promote entrepreneurship programmes and policy initiatives that address gender-based constraints:** Prioritize the most important legal and regulatory restraints in both the formal and informal economy (for example, women's property and inheritance rights) and lobby for reforms that contain effective enforcement mechanisms. Apart from legal and regulatory constraints, it is important to also include constraints related to the unequal division of household and family labour. Inequalities can be addressed, for example, by providing child care and health care benefits in self-employment initiatives.
- ✓ **Encourage appropriate legal frameworks for entrepreneurs in the informal economy:** Many interventions have focused on improving the legal and regulatory framework of SMEs in the formal economy. However, it is also important to encourage appropriate legal frameworks in the informal economy, where over half the workers are women. The informal self-employed need legal recognition of their enterprises and of themselves as economic operators. The legal entitlements that come with that recognition include the right to work, the right to use public resources (for example, street vending), and the right to private property. Policy reforms are needed to correct biases in existing policies against the working poor, especially women, in informal enterprises. Institutional reforms are needed to make relevant policy-making and regulatory bodies (for example, business associations) more inclusive of the informal workforce.¹⁶ In addition, it is important to progressively formalize these enterprises to subject them and their owners and employees to national taxation policies.

Link: See briefs on Labour and Macroeconomics

¹⁵ Centere for Private Enterprise (2006).

¹⁶ For a full discussion of these issues, see Chen (2005).

Measuring Progress

INDICATOR	Level of Measure- ment	What does it measure?	What does it not measure?	Source of Infor- mation
Male : Female ratio of SME owners, if possible broken down by industry sector	National	Gender balance in SME ownership	Obstacles to male or female ownership	Enterprise surveys, official registers of enterprises
Male : Female ratio of self-employed entrepreneurs, if possible broken down by industry sector	National	Gender balance in self employed entrepreneurs	Obstacles to entrepreneurial activities	Labour force surveys, business registers
Male : Female ratio of members of trade and business associations	National	Gender balance in business and trade associations	Male or female member commitment to lobbying the government for gender-friendly business environment	Surveys of business and trade associations
Male : Female ratio of land ownership	National	Gender balance in land ownership	How the land was used	Government land registries

III. Access to Finance and Markets

What is the Issue? What is the Goal?

Entrepreneurship incorporates a wide range of activities—from engaging in micro-enterprises in the informal economy to running family businesses to managing large enterprises. Whatever the size of their business, male and female entrepreneurs need access to finance and markets in order for their businesses to prosper and grow. Access has not been equal due to gender-specific barriers against female entrepreneurs. In addition, there are structural inequalities created by social and cultural norms that are reflected by discriminatory practices, the unequal division of reproductive labour, and psychological barriers due to socialization of these roles.¹⁷

Finance can come from different sources ranging from commercial and state banks to venture capital funds to micro-finance institutions (MFIs).¹⁸ While large companies are usually well served by banks, progress on SME financing has been slow. It is not only about money. SMEs require risk capital, but sources are difficult to tap. So SMEs turn to debt financing, which can be difficult because few entrepreneurs can leverage assets as collateral due to informal property rights and lack of mortgage markets.¹⁹ Women entrepreneurs in the Europe and CIS region are further disadvantaged by gender-specific barriers, which include lack of collateral (i.e., assets given as security for a loan) among other things due to the uneven sharing of privatization gains. Men gained most of the physical assets (property, buildings, and machinery) from the privatization process. Moreover, the dominance of informal activity in the SME framework makes it actually impossible for entrepreneurs to obtain funds from microfinance institutions. Since women are more engaged in the informal than formal sector, this presents a significant barrier. Other challenges that confront women entrepreneurs in obtaining finance are outlined at the end of this brief in the text box: *Financing Women Entrepreneurs: A Global Challenge*.

MFIs in Eastern Europe and Central Asia are the youngest in the global industry and are predominantly comprised of NGOs, which almost exclusively serve their clients through working capital loans and offer very limited savings. A unique characteristic of microfinance is that it is delivered to meet the socio-economic needs of clients often living in the informal economy and traditionally marginalized from formal financial institutions. Instead of using collateral as a basis for approving a loan, MFIs base their lending around an analysis of a client's character, cash flows, and commitment to repay a loan. Thus, women are thought to have equal access to obtaining financing from MFIs. However, in some areas there are cultural and gender norms that may limit women's ability to take up micro-credits. These include primary care responsibilities and traditional male attitudes towards women working in business.

Link: See also Labour brief

MFIs in the Europe and CIS region have focused on meeting the needs of micro and small enterprises rather than targeting lower-income individuals or clients in poorer remote areas. The average MFI serves 6,000 active borrowers.²⁰ While women have a high rate of participation in MFIs, the majority of beneficiaries have been in urban areas. MFIs need to expand their reach to rural and remote areas. However, microfinance is only a first step for business development. For the SMEs to grow in the medium and long-run, more substantial credit lines are required. In that context, access to finance

¹⁷ UNECE/UNDP (2004) p. 2.

¹⁸ Microfinance institutions (MFIs) encompass various types of institutions ranging from formal (banks) to semi-formal (cooperatives, nongovernment organizations, village savings banks) to informal (savings and credit groups).

¹⁹ UNDP (2004).

²⁰ Berryman (2004).

in the capital markets either directly or through lending institutions becomes critical. The majority of countries in the CIS region have small and weak capital markets, which limit the supply of financial resources needed for the proper functioning of SMEs. Banks and other credit institutions are the main providers of funding for the emerging private sector since SMEs are rarely able to directly access finance in the capital markets. However, the region's macroeconomic and political instability accompanied by underdeveloped financial markets means restricted finance possibilities for traditional funders, which is why interest rates are exceptionally high and banks are risk averse. In such conditions, doing business with the private sector is difficult; and when it comes to financing, SMEs are often crowded out. This weakens the position of entrepreneurs, especially those with weak property rights and those who operate in low-value economic activities, i.e., women and the poor.

Access to markets, whether domestic or international, are essential to SMEs. They need to sell their products and services. International donors, such as UNDP, have been active in establishing Business Development Services (BDS) in the Europe and CIS region, which are services that improve the performance of an enterprise, its access to markets, and its ability to compete. Specific services include training, marketing, information, and technology development of individual SMEs. BDS seeks to raise the profitability of enterprises, which directly raises incomes. Therefore, BDS interventions at the micro-firm level can lead to enhanced economic security and income, thus permitting poor entrepreneurs, not least women, to invest in the nutrition, housing, health, and education of their families.²¹

On the macro level, by trading with other countries and attracting foreign investment, countries can take advantage of global market forces – competition, human resource development, technology transfer, and technological innovation – that generate growth. Along with growth, these factors might also bring in new practices when it comes to gender. Competitive pressures can bring flexibility into work patterns that are attractive for women and youth; and foreign direct investment can potentially provide the opportunity for improved gender equality in terms of ethical standards, family friendly policies, and sensitisation of the work place.

Link: See brief of Macroeconomics and Trade and Labour

All entrepreneurs face challenges in accessing credit and markets, but women face the additional challenge of overcoming gender-specific barriers. These barriers include lack of collateral, lack of networks, and traditional views on women's roles. They have greater difficulty in obtaining credit, finding business partners and getting information on business opportunities.²²

Therefore, the goal is to ensure equal access to finance and markets for both male and female entrepreneurs.

BOX: Financing Women Entrepreneurs: A Global Challenge

The challenges:

- Women often have smaller amounts of personal capital available for start-up.
- Women have a greater need for external funding, yet have difficulty obtaining such funding.
- Women lack knowledge about the available options, and the costs of getting this information (measured in money, time, energy) may be high due to family responsibilities.
- Women may face explicit or implicit (structural) gender discrimination.
- Banks may have inaccurate perceptions of women's borrowing and entrepreneurial behaviour.
- Banks often rely on personal profiles and track records in reviewing loan applications.
- Women may be asked to pay a higher interest rate or provide higher guarantees.

²¹ UNDP(2004)

²² UNECE/UNDP (2004)

Responses to challenges:

- Special credit funds
- Mentoring and advisory services
- Development of ties with public authorities, business community, and networks
- Flexible time schedules
- Evaluation of loan applications based on business potential rather than past track record
- Strategies to change women entrepreneurs' self-perceptions
- Strategies to promote a positive image of women entrepreneurs

Potential actors for change:

- International financial institutions (IADB, WWB)
- Public funds providing loans at preferential rates (Kera Ltd Loans, Finland)
- Guaranteed funds (Fonds de Garantie pour la Creation, la reprise, ou le developpement d'entreprises a l'Initiative des Femmes, France)
- Microcredit institutions (Network Credit, Norway; Business Loans for Women, Sweden)
- Private banks (West Pack Bank, Australia; Bank of Ireland)
- Venture capital funds (Women Growth Equity Fund, USA)
- NGOs (Springboard)
- Business angels (WomenAngels.net, Seraph Capital Forum)
- Cooperatives (Cooperatives de credit de Saskatoon, Canada)
- Conditional seed grants (Trickle Up)²³

Why Bother?

Justice and Equality: Better access to credit will help women entrepreneurs buy property and other assets, thereby addressing inequalities in the distribution of assets. In addition, MFIs often work with women from poor households and socially excluded groups and hence have the potential to address social inequality.

Efficiency and Sustainability: Access to financial services makes important contributions to the economic productivity of micro, small, and medium enterprises, improving their efficiency and sustainability. Better access to domestic and foreign markets can result in increased sales of products and services, thus increasing the sustainability of enterprises.

Quality of Life: As businesses grow with access to financing and markets, income increases, improving the quality of life for the children and spouses of entrepreneurs. The additional income can be allocated to productive uses such as education and health. This is particularly true for female entrepreneurs, as it has been argued that money in the hands of women has a more socially-desirable impact.²⁴

Chain Reaction: Women in decision-making positions in successful businesses serve as important role models, inspiring other women to work in business or become entrepreneurs. The next generation will also benefit as gender stereotypes fade and barriers are lifted, improving the opportunities for women in all industries.

²³ The issue of women's access to finance: policy and programmatic responses in OECD countries. Source: Dina Ionescu, former Administrator, LEED Programme, OECD, a presentation at the Second UNECE Forum of Women Entrepreneurs, www.unece.org/ie/enterp/women/program.htm.

²⁴ Sen (1990).

CASE STUDY: Micro-credit Programme in Rural Tajikistan

Due to a high level of male labour migration, many families in rural areas are headed by women. Local customs make women's economic situation vulnerable and insecure. This is further exacerbated by their dependency on remittances from male out-migrants. By teaching women how to get a loan and to use it for various activities—such as livestock breeding, potato and wheat growing, horticulture, poultry farming, and small and medium enterprise development—it increases their independence and ability to support their families.

Through its Communities Programme, UNDP Tajikistan has supported more than 90 Jamoat Resource Centres (JRC) to help strengthen participatory and decentralized decision-making at the local level and improve community development, transparency, and accountability. The JRC Revolving Fund (RF) was established with an idea to helping impoverished communities lacking capital. They also serve as a mechanism to manage small-scale project grants in a sustainable manner, since JRCs are able to prioritize community problems, compile community action plans, and design project proposals for fundraising and practice of monitoring and evaluation. JRCs are managed by a council of elected representatives from the village. Moreover, they have gender committees and women centres.

Until 2005, active female borrowers comprised 27-33 percent of total borrowers. In 2006, UNDP Tajikistan will increase loans for females to up to 50 percent of total borrowers.

Why is it important to use a gender perspective with micro-credit opportunities?

The majority of the Tajik population (well over 51 percent) are women. Moreover, 60-80 percent of agricultural activities are carried out by women. Nonetheless, there are currently more male loan beneficiaries than female. The aim of UNDP, therefore, is to increase the number of female beneficiaries accordingly.

In addition, the number of labour migrants is increasing, leaving many women alone to look after their families. This creates an issue of 'women-headed households.' For this reason, UNDP has come to understand that women in rural areas should be strongly encouraged to participate in UNDP loan disbursements.

What is the goal? Why gender-targeted interventions?

First, the aim is to increase the status of women in society. For example, although men tend to receive loans, in actuality women most often take the responsibility to lead the loan activity. Therefore, UNDP wants women to receive loans and, accordingly, be involved in the income-generation process. Second, this is a very sensitive issue that concerns religion, culture, and tradition of the local population. In this respect, the objective is to intervene and change the behaviour of the local people, giving women more opportunities to build a better life and improve their status in society.

Acknowledgement to: Farrukh Shoimardonov, UNDP Tajikistan

Possible Interventions and Entry Points

- ✓ **Apply gender analysis to improve donor supported trade and finance development activities:** Encourage donors who support trade and credit initiatives (including MFIs and banks) to use a gender lens through which to analyse their activities. This can lead to more effective activities, ensuring that the right target population is being helped.

BOX: Gender Analysis Results in Better Targeted and More Effective Development Activities²⁵

In Georgia, a micro-enterprise programme funded by USAID had been available only for women. However, gender analysis of the target population – internally displaced persons selling in local markets – showed that men were also among the poor. In addition, data demonstrated that male and female clients were equally likely to spend extra income on the family rather than on personal expenditures. Consequently, the programme was restructured to include 24 percent men, i.e., the proportion of men within the target population. After one year, over 70 percent of both male and female clients reported an increase in weekly income.

- ✓ **Monitor the gendered impact of finance and trade opportunities for SMEs by developing statistical data:** A common problem is the incompleteness of statistical data and analysis. According to the UN Economic Commission for Europe (UNECE), data for SMEs is often not available because national business registries do not collect data disaggregated by sex. Even if gender is recorded in the registries, the data is often not published.²⁶ Thus it is important to encourage the development of statistical data by commissioning research and working with financial institutions, trade institutions, and donors. The World Bank's "Doing Business" indicators are a useful starting point. Indicators on "getting credit" include: legal rights index, credit information index, public registry coverage (percentage of adults), and private bureau coverage (percentage of adults). Indicators on "trading" include: number of documents for import/export, number of signatures for import/export, and number of days for import/export.
- ✓ **Encourage "gender friendly" credit and trade initiatives for entrepreneurs:** Policy makers and business and trade associations can encourage private and public financial and trade institutions to adopt policies that promote gender equality. Using statistical data as described above will make arguments more credible. When developing initiatives and programme, use participatory approaches to determine the issues and obstacles that need to be addressed. It is also important to consult with a broad range of stakeholders (for example, business and trade associations, MFIs, banks, government finance and trade authorities, and entrepreneurs). This will lead to better targeted programmes to improve women's access to resources (finance, trade, training, and services).
- ✓ **Provide safeguards to ensure there is no gender discrimination in the implementation of business development services or finance initiatives:** Many policy and programme interventions aim to be gender neutral or involve the provision of services to SMEs on the basis of equal opportunities for men and women. However, because gender discrimination can develop in the way the initiatives are managed, it is necessary to ensure that safeguards are in place to prevent this from happening. Examples include ensuring that gender monitoring takes place, that local project staff are trained on gender issues, and that women as well as men are directly involved in service delivery—for example, as business advisors or loan officers.
- ✓ **Use global and regional resources to strengthen MFIs in the Europe and CIS region:** In order for MFIs to develop and grow, support institutions and networks are needed. Policy makers and other interested groups can tap into global and regional resources.

²⁵ DevTech Systems, Inc. (2004); Estes (2001).

²⁶ UNECE/UNDP (2004) p. 19.

BOX: Examples of Global and Regional MFI Support Institutions and Networks

The Consultative Group to Assist the Poor (CGAP) is a consortium of 31 public and private development agencies working together to expand access to financial services for the poor in developing countries. It is a resource centre for the microfinance industry serving four groups: 1) development agencies, 2) financial institutions, including microfinance institutions (MFIs), 3) government policy makers and regulators, and 4) other service providers such as auditors and rating agencies. CGAP provides a variety of specialized services: advisory, training, research and development, consensus building on standards, and information dissemination (see www.cgap.org).

Women's World Banking is a global network that provides services to financial institutions that support women's access to financial services. It supports affiliates in succeeding as microfinance institutions by providing services in four areas: technical services, financial products and services, policy change activities, and learning services. It has affiliates in Russia and Bosnia and Herzegovina (see www.swwb.org).

The Microfinance Centre for Central and Eastern Europe and the Newly Independent States, based in Poland, is a membership-based resource centre that promotes the development of the microfinance sector. It has created a regional network of 90-plus MFIs to which it provides technical assistance, training, and other advisory services.²⁷

- ✓ **Help women entrepreneurs graduate from micro to SME finance programmes:** Encourage microfinance programmes to incorporate a savings component, which would enable women (including those in remote areas) to build assets to use as collateral or to self-finance investments. In order to have greater impact, microfinance needs to be coupled with other types of products and services (training, technology transfer, marketing, and other business development services). This will help women graduate to other types of financing mechanisms that they will need to grow their business, such as equity financing, leasing, and venture capital.
- ✓ **Use best-case practices to address problems relating to gender-specific barriers:** While the body of work regarding best-case practices in the Europe and CIS region is small, it will grow as donors and governments continue to work on helping women entrepreneurs access finance, information, and markets. UNECE reports on women's entrepreneurship and finance are good starting points.²⁸ Examples from other regions are also useful.

Measuring Progress

INDICATOR	Level of Measurement	What does it measure?	What does it not measure?	Source of Information
Male : Female ratio of credit obtained by entrepreneurs (number of loans, amount of money)	National, Regional, Local	Degree to which credit is obtained by men and women	Degree to which credit is available	Survey of SMEs, Donors (banks, if they are willing to provide the data)
Male : female ratio of beneficiaries of finance and BDS initiatives	National, Regional, Local	Whether men and women are equally included as beneficiaries of programmes	Programmes that specifically target women as beneficiaries	Monitoring and evaluation records of donors and government agencies involved in programmes

²⁷ See www.mfc.org.pl.

²⁸ UNECE (2004).

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Education

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Education

Targeting education is a vital part of a gender mainstreaming strategy in every developing society, on both national and local levels. Gender inequalities in education have large implications for issues of occupation, occupational segregation, and social stratification; the gender pay gap; gender attitudes and behaviour; political participation; and the lifestyles of both men and women. Education is at the core of the empowerment of women and the transformation of traditional gender stereotypes. Therefore, education itself is the single most important entry point for achieving gender equality in the long term. For measuring advancement both quantitative and qualitative indicators are relevant.

I. Equality in Enrolment and Completion Statistics

What is the Issue? What is the Goal?

Globally, the basic measure of gender equality in the education sector is the rate of girls enrolled in primary education in comparison to the rate of boys.¹ Another relevant measure is the percentage of women and men at different educational levels. For the total male and female population the relevant measure is also the illiteracy rate², which is usually different for women and men. Higher illiteracy rates are often characteristic of older generations, and they tend to decrease primarily due to the mortality factor. While illiteracy and primary school attendance are still the two most important indicators of gender inequalities in education in countries in the Southern hemisphere, in post-socialist countries those indicators are simply not sufficient.

Some recent negative trends in enrolment of girls, even in the primary level, can be observed as a result of a number of different factors, including re-traditionalisation (return to patriarchal values and, consequently, pressure for early marriage), family financial problems, and general high insecurity—including the risk of child trafficking in some rural areas.³ However, these trends do not profoundly change the generally positive picture of high gender equality in quantitative terms. In terms of overall enrolment, the gender gap in post-socialist countries is narrow, nonexistent or even the opposite of what we find in the Southern hemisphere due to the socialist influence on education as well as other social and economic changes in transition. In many countries, boy's enrolment is starting to fall behind that of girls, especially on the secondary and tertiary level, while on the level of post-graduate and Ph.D. studies men still outnumber women. Some ethnic groups, such as Roma, are particularly vulnerable in regard to education, especially the education of girls.

Link: see Gender brief on Poverty – Roma box – for further information

At the same time, high overall enrolment rates for girls and female students often hide high levels of segregation of educational profiles, thus perpetuating occupational segregation. For example, girls typically still lag far behind boys in information technology programmes, while there are fewer boys than girls enrolled in humanities, education, and cultural programmes. Furthermore, higher levels of education of young women in comparison to young men are neither a guarantee of employment

¹ Rate is the relation between the numbers of girls/boys who attend per 1,000 of girls/boys of that age.

² Illiteracy rate is the number of illiterate people by sex by the total number of people by sex.

³ In northern Albania, for example.

nor of equal remuneration. On the contrary, a decreasing level of the quality of education seems to correspond to women's inclusion, thus reproducing gender inequalities in different ways.

Link: see Gender briefs on Poverty and Labour for further information

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 or are they recruited for semi-criminal and criminal activities? What is the connection between very low payment for qualified labour and women's inclusion in education? How does a very low quality of education in some countries affect gender inequalities? Does education contribute to better employment opportunities? If so, exactly what kind of education actually benefits employment? 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.

*In summary, the **goal** of gender mainstreaming in terms of education should be:*

- **Equal enrolment** of both genders in all faculties, programmes of study, and levels of education (from pre-school to Ph.D. programmes).⁴
- **Equal completion** rates of boys and girls, women and men, in all faculties, programmes of study, and levels of education.⁵
- **Elimination of gender segregation** of educational profiles.
- Elimination of **gender bias** in curricula and textbooks.
- Achieving a **gender-sensitive approach in teaching** and training that is equally encouraging for both genders and that makes the best use of human resources in society.

CASE STUDY: Halting the growing gap in educational achievement between boys and girls in Tajikistan

Background information: As in many transition countries, women in Tajikistan carry the heaviest burden and responsibilities of transition, a burden further aggravated by the civil war, collapse of social services and safety nets, and labour migration. Lack of economic and sometimes physical security for young women has encouraged early marriage and the re-appearance of polygamy. There is growing evidence of a reversal of educational achievements from Soviet times.

Urgent action is needed to halt the growing gap between the educational achievement of boys and girls. One reason for the low number of women from remote regions of the country enrolled in higher education is the fact that universities and institutes are not in a position to provide accommodations for women to live and study in cities. In most cases parents of young women fear for their daughters because of the lack of safe housing with basic utilities (water, heating, sanitation, etc.). To improve the access of women to higher education, UNDP—within its programme “Women in Development” (WID)—established a Learning Centre Dushanbe in 1998. The objective of the Centre was to organize and implement training on women's mental and reproductive health, on human rights, and to promote women to leadership positions in politics, in the economy, and within their communities.

⁴ Due to the differences in numbers in each generation of women and men, a much more precise indicator of gender inequalities at different levels of education is actually the rate of enrolment, which measures the number of those enrolled, by sex, in relation to the total number in each generation, by sex. Otherwise, the fact that girls make up less than 50 percent of pupils in primary schools could be misinterpreted as inequality, although it may be the normal consequence of differences in the sex ratio of different generations. In fact, it should be compulsory to abandon this misleading indicator of percent in favour of rates.

⁵ If completion rates are suggested to be taken into account as a valid indicator, it makes even more sense to use enrolment rates as an adequate indicator.

Today the Learning Centre is providing a scholarship programme for 150 young women from 38 remote, mountainous districts. Each receives a stipend and free accommodation in a refurbished hostel in Dushanbe. These students are studying in 10 higher education institutions in various fields, including medicine, agriculture, foreign languages, and pedagogy. Former students are today working with local governments in their regions of origin and are teaching Russian, English, and computer classes in their local schools. Some have started local NGOs and community groups.

The Learning Centre is a unique experience in improving access of women from remote regions to higher education. Each year a growing number of young women apply to the Centre; and supplementary classes in Russian, English, computers, and leadership skills make it easier for them to adapt to the requirements of university curricula and help them broaden their horizons.

The Learning Centre was handed over to the Ministry of Education in September 2003.

Acknowledgment to: Farrukh Shoimardonov, UNDP Tajikistan

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. Education is closely linked to people's readiness and ability to exercise their human rights, including the right for gender equality.

Efficacy and Efficiency: Research shows that "gender inequality in education is bad for economic growth,"⁶ as states cannot capitalize on the full productive and creative potential of their populations 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. This means that there is not an optimal distribution of individual talents, capabilities, and motivation but, instead, distribution is shaped by gender stereotypes. Women more often than men are educated for 'typical' gender jobs; and in a similar way they often perform low-paying jobs—especially in the informal economy, which is very well developed in post-socialist countries. Besides economic costs there are social costs of this imbalance, because the important jobs related to such 'caring activities' as teaching and nursing are largely undervalued.

High enrolment rates of women at higher educational levels in countries in the region could actually hide a very low quality of education, as a consequence of severe budget cuts during the transition. At the same time, new private educational institutions in the region are not necessarily of high quality. Therefore, it is also important to explore the *quality* of education in the specific country and how that is connected to the high inclusion of women. In addition, if education does not lead to taxable employment, the investments made to fund it do not reap returns and are inefficient.

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 and their underpayment as well.⁷ For example, girls are often encouraged to study subjects in which the logical career segue is less prestigious and lower paid. This is also directly linked to the high risk of poverty in female-headed households as well as the low value placed on fe-

⁶ Dollar, Fisman, and Gatti (1999).

⁷ Elder and Johnson (1999).

male-dominated sectors of the labour market. Closing gender gaps in the labour market need to begin with redressing them within the school system. However, gender differences should not outweigh other problems related to employment and the labour market in countries in transition, such as generally high unemployment rates, low salaries regardless of education, low quality and outdated education, etc.

Agency and Empowerment: Another aspect of the relevance of education for gender equality lies in the fact that education of both women and men is closely linked to their health, quality of life, and especially to their attitudes. Education increases life chances and often contributes to open mindedness that breaks down gender stereotypes.

BOX: Life satisfaction and education in Serbia: Research results

Research in Serbia (survey, representative sample) has shown that the value orientation of women (modernistic, heterogeneous, or traditionalistic) was strongly connected to education. Moreover, value orientation was shaping women's attitudes towards marriage and parenthood. Women who were more educated handled conflict better, were more satisfied with both their professional and personal life, and had higher life satisfaction in general. They were at the same time more critical of 'traditional' gender roles and placed higher pressure on their partners to accept a more fair division of labour within the household.

Women with higher education tended to exercise a 'non-sacrificial' style of parenthood, centering parenthood on psychological rewards, while women with lower education showed the tendency to see the parental role as 'sacrificing'. At the same time, women with lower education were less satisfied both with their partner and parental roles. Thus, in this case, education is the most relevant source for the increase of women's individual agency, both in the family and in society. What is equally important is that education also brings 'instant rewards' to women, increasing their capacity to control their own life and to be more competitive in the labour market, while at the same time increasing their level of personal satisfaction. The education and professional career of women remain the most important influences on the modernization of family relations and towards gender equality⁸.

However, in post-socialist societies forces of re-traditionalisation tend to be very strong, and younger generations run the risk of becoming more conservative than older generations. Neo-conservatism is often connected to the revival of different patriarchal values and the strengthening of nationalism throughout the region. Education in a post-socialist context often reflects the ambivalence of the state: on one hand, the aim is to transmit the modernistic and globalized values of gender equality; on the other hand, it is to strengthen national identity by (among other things) reaffirming traditional gender roles. The same ambivalence is present in the media. The result is often a kind of value vacuum, or value confusion, to which young generations are exposed. Different types of education, including informal education, are becoming increasingly important in a 'knowledge society' and the globalized labour market.

Link: see brief on Labour for further information

Possible Interventions and Entry Points

- ✓ **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.

⁸ Blagojevic (1997).

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. At times, girls as well as boys 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 should be undertaken to encourage boys to study teaching or social work, or other “non-traditional” subjects for boys. Another possibility would be to have quotas in different schools for the lesser represented gender (30%, for example).

CASE STUDY: Mainstreaming gender in education in Bosnia and Herzegovina

In Bosnia and Herzegovina a three-year project “Gender mainstreaming in education and media” sought to change gender stereotypes and professional segregation at all levels of education, resulting in six seminars for some 500 directors and teachers from 208 elementary schools and 85 secondary schools.

Two very important results of the project are the publication of two collections, one related to the gender equality aspects of different disciplines, including religious education (Muslim, Orthodox Christian, and Catholic) and another which includes sets of concrete suggestions to the educators on how to organize different classes, workshops, class events, or parental activities to discuss gender-based stereotypes and prejudices.

The approach to gender mainstreaming in education in Bosnia and Herzegovina is an excellent example of both comprehensive and in-depth approaches. It mobilizes all relevant stakeholders in the education process (children, educators, and parents), and it creates both the practical conditions for the realization of change (through curricula, training of educators, and provision of materials) as well as a favourable climate for that change to happen through the active inclusion of parents and children.

It should be mentioned that there are two important side-effects to such a comprehensive approach to gender mainstreaming in education for Bosnia and Herzegovina itself. This project brings together professionals across ethnic lines, thus contributing to the building of a more tolerant civil society and better acceptance of differences between people, including gender differences. Also, this project, with many concrete suggestions for the educators, is introducing a fresh, modern, and student-centered methodology, which is a novelty in the education system of BiH. With topics such as health, love, friendship, family life, etc., this project is making strong connections between an education-for-life approach and a change of patriarchal values⁹.

- ✓ **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).

⁹ Zbornik gender pristupa u odgojno-obrazovnom procesu, Sarajevo: Ministarstvo za ljudska prava i izbeglice Bosne i Hercegovine, 2005.

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"> • gender mechanisms at different levels • students • student groups and government • teachers • teacher unions • parents and parent associations • Ministry of Education and its departments and institutes • local governments • school boards • education policy researchers • education NGOs 	<ul style="list-style-type: none"> ➤ What is the gender balance in all of these groups? ➤ How can gender mechanisms, if they exist, contribute to the achievement of gender equality in education? ➤ 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)? ➤ 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)? ➤ Are there high-ranking officials in Parliament or the Ministry of Education who are interested in pursuing a gender equality agenda within education? ➤ Is gender equality an issue for student government, parents groups, or other stakeholders? ➤ Is there gender expertise within your department, in UNDP, or elsewhere within the government that you can access?

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female rate of enrolment at all levels of schooling (primary, secondary, vocational, post-secondary)	District Regional 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 different socio-economic groups or ethnic groups	Enrolment statistics
Male : female rate of enrolment in all subjects in secondary, vocational, and post-secondary education	District Regional 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 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

II. Structural Equality within the Teaching Profession

What is the Issue? What is the Goal?

In most of the post-socialist countries patterns exist where most teachers at the primary and secondary school level are female, with the proportion of male teachers increasing at the tertiary level. (However, feminization of the teaching profession is already taking place at a rapid pace at the lower levels of university education.¹⁰) Notably, day-care and pre-school positions in particular are heavily dominated by women. On the other hand, managerial positions such as principals, directors, deans, and rectors of universities are often (although not always) held disproportionately by men. The result is a sector disproportionately dominated by women—except in decision making positions with higher wages and prestige. One of the major obstacles to gender mainstreaming in education comes from the fact that men dominate positions of power, while at the same time they may not have been gender sensitized.

Structural equality within the teaching profession is thus both an issue of equal opportunities and sex-based occupational segregation within the labour market, but also an issue of gender mainstreaming in education. Questions raised here need to be linked to employment policies and actions within the labour market.

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.

Link: see Gender brief on Labour for further information

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.
- Promoting equal participation in **decision-making** positions in education.

Why Bother?

Justice: A lack of women 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. Greater inclusion of women into decision-making positions will contribute to the gender mainstreaming of the education sector, because women are at the moment, in countries in transition, much more sensitive to gender issues than men.

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 in-

¹⁰ See, for example European Commission (2003).

flexible labour market. Particularly in times of economic crisis or transition, such inflexibility can greatly exacerbate gender gaps in unemployment rates.

Gender Mainstreaming in Education: If gender balance is achieved at all levels among teachers, then the gender equality model emerges as a new role model for students. This can, in the long run, contribute to the change of gender stereotypes and to the higher inclusion of men into the 'caring' professions, which would also create more socially inclusive societies.

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 lowers the prestige of the profession, which in turn drives down the quality and value of the sector. This, in turn, lowers the prestige of education itself, and thus increases the 'negative selection' of teachers (i.e., the best students are not attracted to the teaching profession).

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 opportunity policies that actively promote and encourage women in management positions can also be effective.
- ✓ **Wage Review in the Context of Educational Reform:** Because part of the reason for sex segregation in the education sector 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. This would promote change in favour of high quality teachers, high-quality teaching, and ultimately high-quality educational outputs, leading to a substantial improvement in the human resources of the country.
- ✓ **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 teacher unions.

Link: see Gender brief on Labour for further information

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female ratio of teaching staff	District Regional National	Gender balance/ gaps in teaching staff		Labour market survey
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

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.

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

School Curricula: There are various opportunities at all school levels and in many different subjects where a gender aspect should and 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: gender equality in interpersonal relations, the family, and the household; gender-based violence.
- Civic studies: gender equality issues in political representation and participation; civil society and NGO efforts in supporting gender equality.
- Human rights education: issues of justice and fairness; anti-discrimination on the basis of sex and other “differences”.
- History, language, and literature.
- Biology and ecology, life sciences in general.
- Media studies and cultural studies.

At the same time, it is equally important that all subjects are taught in a gender-aware manner; otherwise positive messages risk being undermined by contradictory messages.

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 and offer students with a special interest in gender the opportunity to become gender specialists.

At the same time, gender equality issues should also be integrated into other programmes of study in more traditional faculties and departments, such as public policy and public administration programmes and faculties of law. Gender courses are also being offered as specialized courses, such as Gender and Health or Gender and Violence, at university departments throughout the region. Gender studies are being developed both as post-graduate and Ph.D. studies as well as through specialized courses.

Teaching Materials and Textbooks: Here, gender mainstreaming efforts should investigate questions such as: 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?

BOX: Textbooks in Romania

The most relevant national studies on the impact of curricula reforms in Romania showed the existence of a series of gender discriminations in the new alternative textbooks. There is a general conservative, traditional definition of gender within these new teaching materials. Results of the study have shown that:

- **At a visual, linguistic, and content level, schoolbooks create a masculine world.** Example: Pictures with masculine characters predominate. Out of 5505 pictures with humans in primary texts books, 3281 are men/boys and only 756 are women/girls. The number of masculine characters in the content of texts is higher for each education cycle and within each curricular area; linguistically, the pronoun associated with such words as professor, colleague, and friend is dominated by the masculine.
- **Dichotomous presentation of gender.** Gender is defined through differences more than through similarities, in complementary situations/roles, and in functionalist ways. What women do (mainly in private life) men almost never do (in public life) and vice versa. As such, an unbalanced gender model of success is promoted. In science schoolbooks for primary cycle: of 26 names of personalities, only 2 are women. In history: of 116 names, only two are women. In textbooks for drawing: women are models, men are artists.
- **Homogeneous treatment of gender.** Promotion of a unique “good” model of femininity/masculinity.
- **Lack of gender specificity.** Very few images and texts about specific female experiences: pregnancy, breast-feeding, menstruation, etc.

Teacher Training: The way in which teachers present materials – from math 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 and are often a part of a socialization process, whereby rather than openly favouring male students in math or science classes they subtly reinforce gender stereotypes in classroom exercises. This type of stereotyping is much more difficult to see and therefore needs special attention.

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” their aggression or frustration. This can lead to problems for both genders in future social interactions. In countries in transition, much of this knowledge is not yet widely shared. As such, resource material for teachers and the training of teachers is a priority issue.

BOX: Gender Lens: Measuring the Child-Friendliness of Schools

- Are community leaders and parents equally supportive of boys and girls attending this school?
- Do community leaders and parents value female and male teachers equally?
- Does the principal treat male and female teachers the same?
- Is the school close enough for all school-age boys and girls to walk to it safely?
- Do girls and boys feel safe from bullying, discrimination, and sexual harassment in this school?
- Do teachers encourage girls and boys to speak and contribute equally? Do teachers value the views of boys and girls equally?
- Does the curriculum reflect the lives of boys and girls?
- Do boys and girls feel confident in making subject choices that may not be traditionally male or female subjects?
- Do teachers and materials portray girls and boys of varying socio-economic backgrounds with equal prominence, potential, and respect?
- Do extra-curricular activities equally attract the participation of boys and girls?
- Do teachers offer relevant training and support on reproductive health equally to girls and boys?
- Are there activities organized by teachers or children that will create a gender-friendly culture of peace in the school? (sports, cultural events, etc.)

Each question opens the door for exploring 'why' there are gender differences!¹¹

Student Councils and Extra-curricular Activities: The school environment is also an important site of socialization and interaction of 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:*

- To eliminate gender stereotypes from **teaching materials** and curricula content.
- To promote gender mainstreaming in the education system.
- To identify and **eliminate biases** within the classroom that favour either boys or girls, or which reward or punish behaviour of one gender.
- To identify and **eliminate indirect discrimination** and treatment.

¹¹ GENIA toolkit.

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.

Efficacy and Efficiency: Elimination of visible and invisible barriers to full participation of both girls and boys in any education of their preference actually increases the efficient use of their human resources. People become more productive if they do what they have an individual interest to do.

Chain Reaction: Gender stereotypes and traditional gender roles are inherited generation to generation, but are 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 by individuals and societies. Finally, there are considerable personal benefits for young people that may be attained through gender-sensitive education, leading to more balanced and rewarding relationships with each other and lifting the burden of pressure to fit into traditional gender roles.

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

Possible Interventions and Entry Points

- ✓ **Guidelines and Methodological Materials:** Policy makers and/or gender mechanisms should ensure that there is a mandate for the integration of a gender perspective in primary, secondary, and tertiary level 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 be developed for inclusion in pedagogical college (teacher training) curricula.

- ✓ **Curriculum and Textbook Changes:** First, measures need to be taken to eliminate sex segregation in general subjects such as language and literature, history, science, biology, etc. Second, changes should be promoted from kindergarten to the university level. Entry points for these changes are: research on textbooks and curricula to disclose gender bias; advocacy campaigns aimed at ministries of education; media campaigns to raise public sensitivity; public campaigns among parents; creation of alternative textbooks; international pressure and cooperation, etc.

BOX: Gender Lens to Create Curriculum and Textbooks Free of Gender Bias

- Is the steering committee composed of equal numbers of women and men who are gender-sensitive?
- Will the needs assessment equally involve boys and girls so both their needs and interests are identified?
- Do the topics and outline of the curriculum and teaching materials fulfill the needs of boys and girls?
- Do the topics and outline of the teacher materials meet the needs of female and male teachers?
- Are gender issues taken into consideration in the workshops in which experts agree on the content of the curriculum and materials?
- Are the writers and artists gender-sensitive? Is there a gender balance of authors and artists, if available?
- Are the text, language, and pictures free of gender bias?
- Will equal numbers of boy and girl students be involved in the pilot testing of the curriculum and textbooks?
- Will all female and male teachers of this specific subject be trained to teach the new curriculum in a gender-responsive way?
- Will the new textbooks be available to all boys and girls.¹²

- ✓ **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. Gender focal points appointed in local governments could play an essential role in the promotion of gender equality in education.
- ✓ **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.
- ✓ **Research on Actual Teaching Practices:** The attitude of teachers and children should be considered to give a clear overview of the problem in different contexts.

¹² This Gender Lens was created in a GENIA workshop of Pakistan with government and non-government stakeholders in education. 2002.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Percent 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
Percent 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
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

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 does the 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 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 Gender briefs on Macroeconomics and Labour for further information on the implications of reproductive labour.

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.
- ✓ **Research on parenthood** in different contexts to understand different patterns of sharing the obligations and responsibilities of mothers and fathers and identifying specific entry points for different cultural settings.

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

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Health

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Health

Health is a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity.¹ The enjoyment of the highest attainable standard of health is one of the fundamental rights of every human being without distinction of sex, race, religion, political belief, or economic or social condition. Thus, the ultimate goal of a health policy is the production and maintenance of good health and well-being, for which health services are only one of many critical inputs. Health and well-being are dependent on many factors, such as economic status, public policy, health insurance systems, access to services, commodities, education, social and cultural factors, behaviour, and environment.

Gender mainstreaming in health identifies, analyses, and acts upon inequalities that arise from belonging to one sex or the other, notably from the unequal power relations between the sexes. These inequalities can create, maintain, or exacerbate exposure to risk factors that endanger health and well-being. They can also affect the access to and control over resources, including decision-making and education, which protect and promote health, and the responsibilities and rewards that follow.²

I. Gender and Health Policy

What is the Issue? What is the Goal?

Individual health and well-being depends on many important factors related to gender. The combination of one's biological sex and the social context of one's gender strongly determines the nature of the health problems that an individual is likely to encounter. Furthermore, the subsequent effect of these problems on individual will also be influenced by both their sex and gender roles.

For the most part, health policies and programmes have focused on biological aspects of diagnosis, treatment, and prevention. Likewise, when considering the differences between men and women there is a tendency to emphasize biological differences as explanatory factors for well-being and illness. A gender approach to health, while not excluding biological factors, considers the critical roles that social and cultural factors as well as power relations between women and men play in promoting, protecting, or impeding well-being.³

Socio-cultural determinants: Evidence documenting the multiple connections between gender and health is rapidly growing. For example, it has been shown that men and women respond to stress and symptoms of mental illness in quite different ways. Men, given dominant male stereotypes, are reluctant to seek professional help for depression or anxiety, instead turning to anti-social coping mechanisms such as alcohol use or even suicide.⁴ In general, women tend to focus on prevention, whereas men seek health services only in case of illness. Social and economic factors, such as violence, urbanization, and the disruption of certain cultural practices and traditional family roles, also contribute to the rising incidence of mental illness.⁵ Gendered views on women's health empha-

¹ World Health Organisation Constitution.

² WHO (1998).

³ WHO (1998).

⁴ WHO (2007).

⁵ Reproductive Health Outlook (2000).

size the need for a holistic approach, which includes self-esteem, personal autonomy, freedom from violence, and sexual choice.

Economic determinants: Economic factors—including, of course, poverty—also affect well-being. Gender roles and unequal gender relations interact with other social and economic variables, resulting in different and sometimes inequitable patterns of exposure to health risk, and in different access to and utilization of health information, care, and services. 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. The health impact of the linkages between gender and poverty are most clearly seen in terms of overwork, hazardous work, and poor nutrition. Poverty and gender also have significant linkages in relation to mental illness, vulnerability to violence, and stigma due to health problems. Nutrition is a key area where the combined effects of gender inequality and poverty produce ill-health for women and girls. Furthermore, certain conditions of ill-health may lead to women's social exclusion and subsequent poverty, pointing to the importance of recognizing a cycle of ill health and poverty.⁶

Link: see Gender brief on Poverty for further information

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, which can in turn 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, dung, or wood fire energy source might experience respiratory problems as a consequence.

Link: see Gender brief on Energy and Environment for further information

Multiple factors: Very often, well-being and health 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.⁷ Similarly, women are more likely to be exposed to sexually transmitted diseases than are men due to a combination of physiological and social factors.⁸ 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, environment, and social factors. The gender dimension of health in Europe and the CIS seems to be significant if we look at the gender gap in life expectancy, which is lower for men by 7 to 10 years. Some important causes and factors of low male life expectancy include:

- Deaths in armed conflicts and street violence. (By 1997, mortality from injuries and violence for people under 65 years of age was five times higher in former Soviet Union (FSU) countries than in Western Europe.)⁹
- Higher mortality rates from accidents, including traffic accidents in particular.
- Greater exposure to occupational hazards and accidents.
- Higher rates of suicide.
- More cardiovascular diseases and other illnesses directly or indirectly related to consumption of alcohol and tobacco.

Biological and physiological determinants: The biological course of a disease may be different in women and men; society may respond differently to sick males and sick females; women and

⁶ Oxaal and Cook (1998).

⁷ 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.

⁸ Reproductive Health Outlook (2000).

⁹ Pace (2002) p. 53.

men may respond differently to treatment; or they may have different access to health care and/or be treated differently by health providers. Some diseases will affect only men or only women, such as those associated with reproductive organs and functions. Other diseases affect men or women disproportionately due to biological and physiological factors, such as cardiovascular disease and osteoporosis.¹⁰ While men are more likely to die prematurely, it is women who experience more chronic diseases and disabilities, especially in old age (WHO, 1998).

*The **goals** in regard to a gender-sensitive approach in health and well-being are thus:*

- Identification of gender concerns in health and well-being.
- Analysis of causal factors from a gender perspective.
- Gender-disaggregation of all data on incidence of disease and infirmity.
- Development of gender-sensitive public health policies.
- Development of prevention and care programmes that take gender into account, striving to eliminate barriers that make one gender more vulnerable than the other.
- Gender sensitive education programmes in schools and among young people, focusing on disease prevention and healthy lifestyles.

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: If gender-based determinants are not considered, health promotion policies risk being inefficient. According to WHO, gender mainstreaming is the most effective strategy for reducing the health-related gender gap.¹¹ Increased well-being of both men and women not only decreases public expenditure in regards to medical care and social benefits to unhealthy people, but it is also likely to increase the productivity of the entire population. Good health is fundamental to sustainable economic growth. Investment for health not only unlocks new resources but also has wider benefits, contributing in the long term to overall economic and social development.¹²

Possible Interventions and Entry Points

- ✓ Targeting gender-balanced preventive care, taking into consideration the different gender roles and specific sex-related health issues.
- ✓ Reducing external risks that disproportionately affect either men or women (e.g., occupational hazards, traffic fatalities, alcoholism, and smoking).
- ✓ **Gender-sensitive approach in medical research, clinical studies, and pharmaceutical drug testing:** Women and men may respond differently to drugs and medical methods as well as to

¹⁰ 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 (see Reproductive Health Outlook, 2000).

¹¹ WHO Euro (2001).

¹² WHO (1998a) p. 8.

the causes and courses of an illness, which may vary. Criteria for public funding should include sex/gender considerations in the research design.

- ✓ **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 be exposed to media at different times of the day.
- ✓ **Public information campaigns focusing on the importance of prevention** with a gender sensitive approach.
- ✓ **Education and awareness-raising campaigns** at schools and among youth promoting healthy life-styles and prevention programmes.

Measuring Progress

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
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
Gender disaggregated data and research in health sector*	National Local	Whether data and factual information is available to inform policy decisions	To what extent policy formulation is based on this	
Gender sensitive public information and education to increase preventive inspection	National	Progressive health policy and gender sensitive approach	Efficiency of preventive programmes	Public policy

*Data disaggregated by sex, age, and social class.

II. Access to Health Care

What is the Issue? What is the Goal?

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 in this area. There are differences in the opportunities and resources available to women and men, and in their ability to make decisions and exercise their human rights, including those related to protecting health and seeking care in case of ill health.

The focus on poverty in women's health provides an opportunity to broaden the idea of what constitutes women's health needs, moving away from the current focus on reproductive health. Thinking about women and poverty can draw attention to issues around well-being arising from the wide scope of women's activities and how gendered patterns of disease and health risk are affected by socioeconomic position. However, it is important to recognize that women's health problems and access to health care are affected not only by poverty, but also by gender inequality.

Studies suggest that the constraints of poverty and gender mean that it is poor women (and girls) who are least likely to have access to appropriate care and to seek adequate treatment. Issues of health policy, financing, and service delivery also have important gender aspects, particularly in relation to budgetary allocation, the impact of user fees on poor women, and the quality of care—all issues that merit further research.¹³

Several aspects of access that 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 the different roles men and women play at home and in the workforce often limit the mobility of women in relation to men, they are both 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. Women are reluctant to complain about treatment unless it is their children that have been mistreated.¹⁴ 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. It is obvious that poverty limits access to health services, but what is perhaps less obvious is that poor health can contribute to poverty in terms of additional expenses and/or lack of employment. The range of factors limiting health access for poor women include time constraints, intra-household resource allocation and decision-making relating to health care, and legal and socio-cultural constraints. 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. The

¹³ WHO, (2003).

¹⁴ WHO, Gender and Health: A Technical Paper (1998).

opportunity costs of medical treatment may also be greater for a woman. If she becomes ill at harvest time, for example, there may be no one who will take her place either in the fields or at home so that the visit to a health worker might impose unacceptable burdens on the household as a whole.

Link: see Gender Brief on Poverty for further information

Social and cultural patterns: 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 services that are sensitive to their needs. Public health clinics are also traditionally the domain of women and children, and men, particularly young men, may feel uncomfortable accessing services at these locations.

*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.
- A greater **understanding among policy makers** of individual and household demands for health and of its wider determinants.
- Improvements in **quality of care**, which take account of women’s perceptions and experiences, in order to increase demand for services.
- **A gender specific and sensitive approach by** health service providers.

Why Bother?

Justice: Equal access for both men and women is an issue of gender equality and basic human rights. The extension to all peoples of the benefits of medical, psychological, and related knowledge is essential to the fullest attainment of health.¹⁵

Accountability: Governments have a responsibility for the health of their peoples, which can be fulfilled only by the provision of adequate health and social measures and affordable services. 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 all health care services.

Efficiency: Increasing access to health services—particularly stressing preventive care—can significantly improve the overall well-being of the population and thereby decrease the national costs of illness treatment.

¹⁵ WHO (1998)

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.
 - **Anonymous 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-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– gender analysis– 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 it.
- ✓ **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.
- ✓ **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.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
percent of men v. percent of women who regularly (annually) receive 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, including accompanying children or the elderly.**	National	Gender gaps in time resources expended on health care	Reasons for increase or decrease in expended time resources	Time-use survey
Quality of care, including gender sensitivity of service providers	National	Can indicate gender sensitivity of service providers as an access issue		Anonymous client surveys*

* See *Possible Interventions and Entry Points* for a description of this methodology.

III. Health Sector Reform

What is the Issue? What is the Goal?

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.

Because such reform is generally fashioned by economists and health managers, lack of gender awareness has frequently resulted in the prioritization of men (who are considered to be the standard) in the allocation of resources. This is often unconscious, with 'gender blindness' leading both individuals and organizations to ignore the realities of gender as a key determinant of social inequality. This problem can only be resolved through the development of gender-sensitive policies that acknowledge both the reality and also the undesirability of the inequalities between women and men, including the unequal division of labour and power.

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.

Introduction of user fees and financial reform: One of the main causes for health reform in the transition countries is the financial burden of the old system, whereby the whole responsibility was carried by the state. 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. In addition, families may selectively pay for curative services and not pay for preventive services, which are often needed and sought by women.

A gender analysis of health and poverty suggests the need for policies that ensure that health sector reform strategies do not put extra-heavy burdens on poor women through increased demands on their time or income.

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. For similar reasons, the role of nurses in the new system should also be analysed from a gender perspective.

Link: See Gender brief on Labour – Occupational Segregation - for further information

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.

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

- To introduce **gender impact assessment and gender mainstreaming in health reform** and take these into account in the **design, implementation, and monitoring** of reform policies with the aim of addressing the special needs of men and women.

Why Bother?

Justice: Because health and individual well-being are basic human rights, economic factors must not be allowed to impede access to health services. In the context of human resource restructuring, it is important to bear in mind that equal access to career opportunities is also a human rights imperative.

Efficiency: Another main goal of reform 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 overall labour market.

Quality of Life: Individual well-being ensured through access to health services is one of the major presumptions for high quality of life. Furthermore, 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).

Possible Interventions and Entry Points

- ✓ **Gender impact assessment:** A review of health sector reforms 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.¹⁶ It is crucial to monitor the gendered impact of any reforms, both in terms of health and economics.
- ✓ **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 oper-

¹⁶ Reeves, Hazel, "Health Sector Reform, Poverty, and Gender Inequality," *Development and Gender In Brief*, Issue 7: Health and Well-being (Institute of Development Studies, 1998), p. 3.

ate 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.

- ✓ **Gender budgeting in the public budget.** Gender analysis of public budgets related to the health system can show if and how gender-specific needs are targeted both in relation to the health services as workplace as well as toward towards patients.

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: <ul style="list-style-type: none"> - 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	Employment statistics
Financial dimension of health services, costs of health care and mediation compared before and after reform	National Local	Indicate the financial burden for poor families, particularly single mothers, families with many children, old aged women		Regulation for service fees and costs of mediation

* 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, below.

IV. 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. It implies the right to make free and responsible decisions about family planning and to have all the necessary information and means to do so. Reproductive health care also includes sexual health, the purpose of which is the enhancement of life and personal relations.¹⁷ Sexual and reproductive health is the one area where gender differences are most significant. Even though reproductive and sexual health is often considered to be a “woman’s issue,” 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 analysed and addressed in a number of contexts:

Sexual and gender roles: Socially accepted gender roles and the power divisions found in society and family often give men primary authority over sex and reproductive health decisions, and can deny women the ability to refuse sex and control sexual events, to use modern contraceptives, or to negotiate condom use. As a result, women are often unable to adequately protect themselves against unwanted pregnancies, sexually transmitted diseases, and their adverse health consequences.¹⁸ 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 that of their partners as well. According to the principles of the International Conference on Population and Development (ICPD), advancing gender equality and equity and ensuring women’s ability to control their own fertility are cornerstones of population and development-related programmes.

BOX: International Conference on Population and Development (ICPD), Cairo, 1994

By shifting focus on the fulfilment of a wider range of women’s needs rather than solely reducing birth rates to address the causes and effects of population growth, the ICPD achieved a paradigm shift in the global agenda on population and reproductive health. Through this new perspective stronger links were made between population, development, and individual well-being. To operationalize this, the conference called for the universal availability of high quality family planning services and the tackling of such issues as women’s reproductive health and rights.¹⁹ Since the conference, 179 States have adopted a 20-year Programme of Action linking population, development, and women’s empowerment.

Maternal health and women’s health: Safe motherhood should be one of the top priorities 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 human beings, rather than as vessels or potential vessels of the next generation. Women who cannot 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 during their reproductive years.

¹⁷ International Conference on Population and Development 1994, Summary of the Programme of Action.

¹⁸ Reproductive Health Outlook (2000).

¹⁹ Ibid.

Men's health: Men's sexual and reproductive 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 in women (the reluctance of men 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.²⁰ Like adults, young people have the right to information about their reproductive and sexual health, and to high quality care and counselling, including contraception. Access to information and services should be warranted in line with the International Convention on the Rights of the Child/ICPD principles of growing responsibility.²¹ 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, services, and commodities to all women and men throughout the life cycle.
- Implementing gender sensitivity **in services** approach where appropriate.
- Empowering women to take **control of their sexual and reproductive lives**.

*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 control their life and sexuality and to have 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 expensive curative treatment and emergency care. Most interventions that promote reproductive and sexual health and rights are both inexpensive and highly cost-effective.²² Returns to investments in women's education and health have a strong impact on the well-being of the whole population and future generations.²³

Quality of Life: Research shows that adolescents who receive appropriate information and services are more likely to delay sexual activity and have fewer sexual partners; they are also less likely to

²⁰ Family Care International (2000).

²¹ For more on the International Convention on the Rights of the Child, see <http://www.un.org/documents/ga/res/44/a44r025.htm>; for the International Conference on Population and Development, see <http://www.unfpa.org/icpd/index.htm>.

²² Family Care International (2000).

²³ World Bank (1995).

engage in risky sexual behaviour, have unplanned pregnancies, or contract a sexually transmitted infection (STI).²⁴ 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 effects on children—not only in the womb but also during nursing.

BOX: Abortion in European Countries

Abortion is not only legal in most of the Central and Eastern European (CEE) countries, it remains a primary method of fertility control. This is largely caused by lack of access to information on contraceptive services and to commodities for contraception.²⁵ Many couples in the region therefore resort to relatively ineffective traditional methods, with failure of these methods usually resulting in abortion. It is estimated that if couples using traditional methods in the region were to adopt more effective modern methods, 23 percent of abortions would be prevented.²⁶

At the same time, various restrictions in law and in practice can make legal abortion services inaccessible. Consequently, an increasing number of women are turning to illegal and, hence, unsafe abortions. These illegal abortions can lead to serious health problems and even death. In fact, unsafe abortions remain one of the primary causes of high maternal mortality in the region.²⁷ Georgia, Moldova, Ukraine, and Russia in particular are all among those countries where women are said not to have the means to prevent unwanted pregnancies.²⁸

Although the general tendency towards undergoing unsafe abortion is somewhat similar throughout the region, the situation differs from country to country due to such factors as legal approach, latest movements to make abortion policies more restrictive, political controversy, and religious and cultural context.²⁹

Guaranteeing women the right and access to safe abortion is a question of human rights, gender equality, justice, public health, and quality of life.

Possible Interventions and Entry Points

- ✓ **Full implementation of the Action Plan of the International Conference on Population and Development:** national strategies and policies (see above box).
- ✓ **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 and childless women 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 are adequately addressed by public health policies, so that their health is not valued only in a maternal context.

²⁴ Family Care International (2000).

²⁵ ASTRA. 2002. Sexual and Reproductive Rights and Health in Central and Eastern Europe.

²⁶ Biard, T.L., Falk, S., and Shehu, E. 2005. “Shifting Focus to the Women: Comprehensive Abortion Care in Central and Eastern Europe,” *Entre Nous*, No. 59:13.

²⁷ Ibid.

²⁸ Ibid.

²⁹ ASTRA (2002).

- ✓ **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 identify barriers to enjoyment of full sexual and reproductive rights.
 - Elimination of barriers to these rights, either through legislative amendments or necessary policy changes.
- ✓ **Ensuring full access to sexual and reproductive health services** regardless of gender, age, social or marital status, or religion. These actions include:
 - Implementation of subsidies for modern contraceptive use at least for socially marginalized groups and youth.
 - Promotion of services where poverty or cultural and religion-related patterns might restrain access, e.g., in rural areas or among certain ethnic groups.
- ✓ **Life-skills based education approach with young people:** Provision of information alone 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 based education programme should incorporate a strong gender component.
- ✓ **Service provider training:** Training can make providers more sensitive to gender and sexuality issues. Coupled with new clinical protocols that clear up misinformation on the safety and efficacy of modern contraception, 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. Therefore, it is necessary to enforce the implementation of a gender sensitive approach into health education.
- ✓ **Public information and education on prevention of STIs.** A gender-sensitive approach in campaigning for existing/new drugs, vaccination, and preventive methods can help to eliminate/eradicate STIs.

BOX: Health service providers who are sensitive to gender and sexuality issues³⁰:

- 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 sexually transmitted disease (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 and evidence of physical and/or sexual abuse during physical exams.

³⁰ Adapted from Reproductive Health Outlook (2000).

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

Measuring Progress

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 recognizing both genders' role in this issue	The quality of such a policy and the adequacy of implementation	Policy review
Use of family planning methods: <ul style="list-style-type: none"> - rate of abortion (safe and unsafe) - abortion related mortality rates - rate of modern contraceptive use 	National	Access to modern methods of family planning, quality and access to sexual and reproductive health services	Gender equality in decisions about the family planning policy	Statistical data
Existence of a state regulated sexuality education and information policy	National	Governmental approach to responsible and ideology-free behaviour in the prevention of unwanted pregnancies and STIs	The quality of education at the individual level	Policy review in education
Preventive programmes with gender-based approach in sex-related illnesses (cervical and breast cancer for women, prostate cancer for men) HIV prevention	National	Governmental approach to responsible prevention and well being of citizens	Accessibility of those treatments	Ministry of Health policy review

V. Gender-Based Violence

What is the Issue? What is the Goal?

Gender-based violence refers to violence that targets individuals or groups on the basis of their gender. The most extended form is “violence against women,” which means any act of gender-based violence that results in, or is likely to result in, physical, sexual, or psychological harm or suffering to women, including threats of such acts, coercion, or arbitrary deprivation of liberty, whether occurring in public or in private life.³¹

Violence against women shall be understood to encompass, but not be limited to, the following:³²

- Physical, sexual, and psychological violence occurring in the family, including battering, sexual abuse of female children in the household, dowry-related violence, marital rape, female genital mutilation and other traditional practices harmful to women, non-spousal violence, and violence related to exploitation;
- Physical, sexual, and psychological violence occurring within the general community, including rape, sexual abuse, sexual harassment and intimidation (at work, in educational institutions, and elsewhere), trafficking in women, and forced prostitution;
- Physical, sexual, and psychological violence perpetrated or condoned by the state, wherever it occurs.

Violence against women is a manifestation of historically unequal power relations between men and women, which have led to domination over, and discrimination against, women by men and to the prevention of the full advancement of women, and that violence against women is one of the crucial social mechanisms by which women are forced into a subordinate position compared with men.³³

Research in almost 40 countries reveals that from one-tenth to more than one-half of women have been beaten by a male partner.³⁴ Violence is a complex, cross-cutting issue that requires multi-sectoral attention. At the same time, there are strong links between gender-based violence and health that demand attention to violence as a major public health risk.³⁵ The fact that violence (particularly domestic violence) is “socially accepted” and exists in a “culture of silence and denial” in many parts of the world highlights the importance of transforming accepted gender roles and stereotypes in order to prevent such violence.

CASE STUDY: Men Against Domestic Violence: Raising public awareness on domestic violence in Armenia and facilitating nationwide public dialogue on the issue

Mass media is one of the most effective tools used to raise public awareness on domestic violence and to carry out information campaigns in support of women’s rights. Taking into account its crucial role in information exchange and dissemination, the UNDP Gender and Politics project incorporated a mass media component into a “Men Against Domestic Violence” project implemented by two local NGOs. The media component targeted journalists and reporters from local TV, radio,

³¹ UN General Assembly Resolution 48/104 (1993).

³² Ibid.

³³ Ibid.

³⁴ Reproductive Health Outlook (2000).

³⁵ It should, however, be noted that violence is not just an issue for the health sector, but needs to be simultaneously addressed from the perspectives of legislation and justice, law enforcement, education, media, and social services.

and newspapers for special training aimed at empowering media representatives with the necessary skills and knowledge to promote public debates on domestic violence. The trainings included: the role of mass media in unveiling the problem of domestic violence in society and proper reporting ethics to be used while interviewing victims of domestic violence and writing articles; and preparation of a TV talk show series on domestic violence as a follow-up to the training.

The training clearly demonstrated that the target group had a rather vague understanding of the domestic violence phenomenon and various forms of family violence, and that they significantly underestimated the degree of such violence in their local communities.

As a follow-up to the training, the Armenian Public Relations Association, one of two NGOs implementing the project, prepared (with the support of the Gender and Politics programme) a series of talk shows on domestic violence, which were aired on a local television channel. The talk show focused on the roles of Armenian state authorities, international organizations, Republic of Armenia (RA) police, judicial and law enforcement bodies as well as social workers and local NGOs in the prevention, handling of, and reporting on domestic violence issues. Participants included representatives from RA Ministry of Labour and Social Issues, heads of social services agencies, RA Police, NGOs, and experts dealing with women's issues.

The talk shows turned into hot TV debates that showed several tendencies: a growing interest in issues of domestic violence among state officials and civil society, an emerging need to identify certain mechanisms for domestic violence studies and preventive measures; and a need for stronger cooperation between the state and international organizations in the field of domestic violence prevention and reduction.

One of the most important outcomes of the debates was the establishment of active cooperation between the RA Police and the UNDP Gender and Politics project. Currently, the project is elaborating a strategy on strengthening RA Police information units in terms of collection of data and its disaggregation. Specifically, the strategy is targeting the creation of a statistical database on domestic violence cases, which will assist in arriving at a clear picture of domestic violence in Armenia. This, in turn, will help to identify appropriate measures for the reduction of domestic violence, and will facilitate the work of police officers and social workers who must deal with such cases on a daily basis.

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The gendered effects of small arms violence

Uncontrolled small arms affect men and women differently. While men are overwhelmingly in the majority of owners, mis-users, and victims of firearms violence, women are disproportionately affected by them. Globally, research shows that the gun a woman has to fear most is the one in the hands of a man known to her: When a firearm is present in the home, domestic violence can escalate to become lethal. Even if the household gun is not turned against a woman, its presence can be enough to terrorise her into submitting to violence.³⁶ Prolific weapons, both inside and outside the home, curtail men's and women's freedom of movement, may limit their economic options, and can result in an increased burden of care or tragedy when, for example, other members of the household are inadvertently injured or killed.

³⁶ Control Arms Campaign, 2003, *The Impacts of Guns on Women's Lives* (Amnesty International). See also the International Action Network on Small Arms (IANSA), Women's Network: <http://www.iansa.org/women/index.htm>.

Forced prostitution and trafficking in women for sexual exploitation

Trafficking in women for the purposes of sexual exploitation is an obstacle to equality and the basic human rights of women. Trafficking and forced prostitution considers women as goods and exploits the socio-economic status of women, particularly in poor developing countries. Sex trafficking, slavery, and forced prostitution are not new forms of exploitative criminal activity. However, those societies that value women's human rights, freedom, and dignity have recognized the harm of these activities to women, families, and communities, and consider them incompatible with universal standards for human rights. Those countries that do not adopt appropriate measures to eliminate trafficking in women and forced prostitution can be considered as conducting a form of institutional violence against women.

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 ashamed of or even responsible for the violence they suffer.
- Women may justifiably fear repercussions from the perpetrator if the violence is reported.
- Women are often "re-victimized" 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.

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

- **Raising awareness** about gender-based violence as a major threat to human rights and public health.
- Taking **appropriate measures** to **prevent gender-based** violence and **care** for survivors from a gender perspective.

*The ultimate goal should be the **eradication of any form of gender-based violence** in 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.

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

Nor does gender-based 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 5-16 percent of healthy years of life lost to death and disability 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.³⁷ Thus, violence cannot 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, and 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.

Possible Interventions and Entry Points

- ✓ **In-depth sociological surveys:** Experiences from many diverse countries around the world have revealed one common trend: In general, individuals do not readily discuss their experiences as survivors of violence due to shame, silence, and taboos that too often accompany 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.

- ✓ **Adopting an efficient legal framework—i.e.,** penal, civil, labour, and administrative sanctions in domestic legislation to protect victims of gender-based violence, including forced prostitution and trafficking in women; preliminary measures to protect victims (such as a provisional remedy to access the home or otherwise to get near the victim); strengthening the responsibilities and competencies of policeman on first contact; etc. Victims of violence should be provided with access to the mechanisms of justice and to effective remedies for the harm that they have suffered. States should also inform women of their rights in seeking redress through such mechanisms.
- ✓ **Developing national plans of action** to promote the protection of women against any form of violence, and to develop preventive approaches, taking into account cooperation with non-governmental organizations concerned with the issue of violence against women.³⁸
- ✓ **Adopt all appropriate measures,** especially in the field of education and media, to modify the social and cultural patterns of conduct of men and women, and to eliminate prejudices, customary practices, and all other practices based on the idea of the inferiority or superiority of either of the sexes and on stereotyped roles for men and women.³⁹
- ✓ **Recognize the important role of the women's movement and nongovernmental organizations** worldwide in raising awareness and alleviating the problem of violence

³⁷ Reproductive Health Outlook (2000).

³⁸ UN General Assembly Resolution 48/104 (1993).

³⁹ Ibid.

against women. Facilitate and enhance the work of the women's movement and nongovernmental organizations and cooperate with them at local, national, and regional levels.⁴⁰

- ✓ **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 "re-victimize" 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 gender-based violence:** In order for gender-based violence to be prevented, awareness must be raised about its negative consequences. In many societies violence against women is so ingrained and accepted that it has come to be seen as normal. 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 inter-ministerial working group to address issues of violence. Members should be drawn from justice, law-enforcement, health and social welfare, education, and other relevant government departments.
- ✓ **State (or municipal) support to crisis intervention and support services:** While gender-based violence remains widespread, appropriate support and counselling services are needed to help victims to deal with the trauma. This is often most effective at the municipal government level. Cooperation with community-based organizations or other nongovernmental organizations is an economical and effective way of delivering such services.

Gender mainstreaming in arms control means the following:

- ✓ Connections must be made between national legislation on domestic violence and on arms control. If a man has ever been convicted of domestic assault, he should not be able to apply for a gun licence. The partner of anyone applying for a firearm licence should be consulted before it is awarded.
- ✓ Women should be included in all aspects of gun control, e.g., legal reform, violence prevention education, public debates, weapons collections processes, and anything else to do with disarmament at local, regional, and national levels.
- ✓ Law enforcement officers must be educated to understand the gendered implications of gun violence.
- ✓ Children, especially boys, should be educated about the risks posed by small arms so that weapons possession is de-glamorized.

⁴⁰ Ibid.

Measuring Progress

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 the nature of violence, most likely perpetrators (family, strangers, etc), emotional and physical effects of violence, etc.		Sociological surveys*
Existence of policy to protect victims of all forms of gender-based violence in public and private sphere (domestic violence, trafficking and forced prostitution, sexual harassment, etc.)	National	Government commitment to end gender-based violence and protect victims	Efficiency of adopted measures	Governmental policy Legal framework
Number of shelters and services helping victims of gender-based violence (special shelters for victims of domestic violence and trafficking)	National	State commitment	Quality of services	Official data

*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.

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Energy and Environment

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Energy and Environment

This brief examines the relationship of gender to issues of energy and the environment. Specifically, it highlights some of the main links between gender and environmental degradation and protection, energy, water and sanitation, biodiversity, and climate change, and it suggests further directions of action and research for policy development and implementation.

In general, gender mainstreaming needs to approach this complex issue from, at minimum, the following four perspectives:

1. The impact of gender and economic and social activities upon the environment.
2. The differentiated effects on men and women.
3. The consequences of environmental degradation upon the Earth's biosphere and ecosystems and, thus, the threat to all living beings.
4. The different means that men and women have at their command to affect the environment.

The Nexus of Gender and Energy/Environment

Some aspects of policy-making that are important from the gender perspective are also important from the broader environmental perspective, namely:

- participatory decision-making and stakeholder involvement, and
- a re-evaluation of the criteria by which "good" policy is judged.

Gender equity is also essential to achieving two important international sustainable development goals:

- natural resources use and management, and
- the prevention of environmental degradation and pollution.

I. Mainstreaming Gender in Policy and Decision-Making for Sustainable Development

What is the Issue? What is the Goal?

Generally speaking, there is a global lack of awareness regarding the critical interrelationship between the Earth's environment and our own human survival, and this lack of awareness is shared by men and women alike. Despite the fact that a great deal of attention has been focused on this issue in recent decades—at the local, national, and international level—many people remain confused or inadequately informed. One reason, of course, is the enormous complexity of the subject, which continues to generate sharp debate among policy makers and within academic circles. In some countries the problem is compounded by a lack of educational materials and media coverage that are accessible to people of all education levels, thus impeding the mobilization of public action.

This is also true in respect to gender differentials of human impact on the environment. Most of the indicators developed for assessing environmental damage are not gender-specific and/or sensitive, and do not allow for the differentiated evaluation of the contribution of men and women to environmental degradation. Such shortcomings undermine the potential effectiveness of rehabilitation and protection measures as well as the potential for altering consumption patterns.

In many countries of the region, especially in the CIS, national sustainable development strategies, government intentions, and the means by which these strategies are to be implemented are not known and/or understood by the general public. To ensure voluntary compliance of the population with new regulations and norms, such as the use of water in protected zones (e.g., parks, forests, reservoirs.), it is of paramount importance to carry on efforts to deepen the understanding of all social groups regarding their impact on environment and, hence, the future of generations to come.

*The **goals** regarding mainstreaming gender in environment for sustainable development are:*

- To minimize the negative impact of certain economic and social activities on the environment by raising awareness among men and women regarding the links between their established patterns of production and consumption (including energy, water, and bio-resources) and the effects of those patterns on the environment.
- To minimize consumption of natural resources by promoting innovative gender-sensitive solutions to environmental problems within the framework of national sustainable development.
- To accelerate the promotion and development of environmentally sound, cost-effective technologies and methods as well as their wide spread use by men and women by providing economic incentives

Why Bother?

Justice: Equal participation of men and women in decision-making with regards to remedial measures and sustainable development programmes and projects is a question of equal rights and responsibilities. Given the major impact that global environmental degradation will have on the lives of all people and on future generations, men and women must share the right and responsibility of defining environmental priorities and developing environmentally sustainable development solutions.

Effectiveness and Efficiency: Participation of men and women in environmental problem-solving, namely in the design and implementation of sustainable development programmes and projects, is likely to ensure their support and collaboration and, thus, improve chances for achieving desired objectives and a lasting effect. In addition, tapping into the expertise of both groups will increase the knowledge base and the efficiency in implementing policies.

Possible Interventions and Entry Points

- ✓ **Research:** Undertake research to develop gender-specific and gender-sensitive indicators that can evaluate the impact of:

- men and women on the environment
 - environmental degradation on men and women
 - government environmental policies on men and women
- ✓ **Policy:** Undertake research and evaluation of policies aiming to induce changes in the established gender-specific production and consumption patterns in order to identify the most effective and efficient policy instruments at all levels. A survey of decision makers and their opinions can help to map the degree of involvement of men and women in the design and implementation of sustainable development policies, programmes, and projects. A sociological survey (interviews) should be commissioned specifically to look for and analyze links between a pro-gender equality agenda and a pro-sustainability agenda.
- ✓ **Establishment of a “Gender and Environment” Working Group:** An inter-ministerial working group or commission could be established to ensure that all policy documents take into consideration both gender and environmental perspectives and their respective implications. Policies in all areas of concern, including energy, land cultivation, and the use of mineral, water, forest, and bio-resources as well as the recycling of waste and the reduction of air pollution, could be better targeted by mainstreaming gender. This does not mean that the task of mainstreaming would fall to this group alone; people at all levels should be responsible for mainstreaming. The role of this group would be to ensure that this has been done at the policy-making level, and to assess the adequacy of these efforts.
- ✓ **Establishment of a Database of Gendered Environmental Statistics:** Statistics or empirical information that is rooted in sound methodology is needed for policy and decision-making. Although some gendered data exists for theme areas such as education, employment, and health through the United Nations Economic Commission for Europe (UNECE) databases and the World Bank, little or no information is collected that is environmental in nature.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female levels of awareness of causal links between environmental problems and established production and consumption patterns as well as of a sustainable development paradigm, 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
Male : female ratio of top political positions for environmental decision-making (e.g., in the 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.	Dynamic of engagement of either men or women	Survey

* Specific methodology will need to be developed to ensure that such measurements can be repeated and compared over time.

II. 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 attitudes, priorities, and power over resources when it comes to environmental protection. Men and women are also likely to interact differently with the environment, which presents women and men with different opportunities to protect it. Moreover, it is likely that men and women will adopt different strategies and have different knowledge regarding environmental protection.

Some examples of these differences include¹:

- For women with multiple roles as breadwinner, homemaker, and community manager, time pressures may force them to adopt unsound environmental practices at the household level, for example, in disposing of waste and recycling. Access to “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 regarding masculinity may make men reluctant to adopt environmentally sound practices, for example, regarding the proper use of a motor vehicle or the disposal of old motor oil, anti-freeze, or other contaminating materials.
- Because women often rely on public transportation more than do men, they possess practical knowledge regarding the convenience of schedules and routes, and should therefore be called upon when planning or revising public transportation systems.
- Because women often play the role of care-giver in the community, they may possess knowledge of ecologically-based practices, such as benefits derived from medicinal plants and other non-timber forestry products.
- In some countries in transition, both men and women have been recently exposed to the values of consumerism, and income and social differentiation has become pronounced. As a result, both men and women may be inclined to ignore the need to constrain their consumption in order to protect the environment (for instance, the construction of private houses on the banks of public water reservoirs and/or the disposal of waste in local rivers).²

Neither men nor women have a “natural predisposition” for environmental protection. However patterns regarding their roles and, consequently, their command over resources in society mean that strategies for promoting environmental protection at the local and community level need to target and involve men and women differently.

*The **goal** of gender mainstreaming for environmental protection is therefore:*

- To promote equal opportunities for men and women as participants and beneficiaries of development by considering their different positions and knowledge in regard to the environment and environmental protection; and, consequently, when developing environmental policy, to call on and consider these positions and knowledge.
- To disseminate information about environmental protection to audiences in a way that recognizes the different roles and priorities of men and women in relation to the environment.

¹ SIDA(1999).

² Lenta (2005).

Why Bother?

Equality: Men and women are consumers, exploiters, and managers of natural resources and contribute to environmental degradation in their own way. The depletion and pollution of natural resources (e.g., air, forests, watersheds, foreshores, agricultural land) will subsequently have a severe effect on the livelihoods of everyone. Therefore, men and women must have equal opportunity to participate in decision-making in regards to environmental services, to which everyone is equally entitled.

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 mean a more efficient use of resources needed for implementation.

Possible Interventions and Entry Points

First, it is crucial to gather and analyse 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 that 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 and/or not?), 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, but also reasons, obstacles, and/or constraints to more environmentally sensitive practices and behaviour.
- ✓ **Natural resources management policy review:** A comprehensive gender impact analysis should be undertaken that reviews policy and practice in areas of energy, water, solid waste disposal, and other environmental issues. The goal of such a review would be to identify ways in which such policy might affect men and women differently, 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 home waste disposal but who have little available time and/or no access to a vehicle, may have little motivation to recycle.

Once the different knowledge bases and lifestyles of men and women are identified, the following potential strategies promoting environmental protection could be pursued:

- ✓ **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 particular 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.

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 National statistics
Male : female levels of awareness of environmental problems and their specific contribution to the environmental degradation, 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
Male : female who consume or purchase more environmentally friendly products ³	National and local	Gender differences in decision-making and environmental awareness	Decision-making power in the household, financial capabilities to have purchasing options	Survey and consumer study statistics

*Specific methodology will need to be developed to ensure that such measurements can be repeated and compared over time.

³ In the Mazandaran Province in Iran, women were crucial for the acceptance of environmentally friendly agro-ecosystem management. Initially, pesticide shops campaigned against more environmentally friendly alternatives. However, after implementing an awareness-raising campaign among village women on the effects of pesticides on families, the women prompted farmers to reduce or eliminate the use of harmful chemicals in agricultural production. (UNDP GEF).

III. Degradation and Rehabilitation of the Environment

What is the Issue? What is the Goal?

Men and women are often affected differently by local and regional environmental degradation given the differences in their tasks and work patterns. For instance, if men primarily suffer from exposure to environmental hazards related to their employment, such as mining or other potentially hazardous industries, women more frequently suffer from environmental hazards in the home, such as exposure to gas or wood-fire stove smoke.

Environmental degradation is often addressed by the implementation of environmental protection policies. However, unless these policies are designed and implemented with caution they can have a drastic negative impact on livelihoods. For example, certain segments of the work force have suffered job losses caused by either depletion of natural resources and/or measures undertaken to rehabilitate fragile ecosystems. Among the most affected sectors are:

- forestry
- mining
- fisheries
- agriculture

Traditionally, these are all sectors that are heavily dominated by men. Apart from the obvious economic crisis that can result from job loss, the psychological impact can also be significant, affecting the way that men view environmental protection overall.

*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 rehabilitation, to consider the diverse needs of and effects on men and women.
- To identify alternative income and/or job-generating schemes in instances where remedial environmental measures may lead to displacement and the loss of employment—particularly in instances where there is a gender bias.

Why Bother?

Justice and Credibility: Men and women have the right to equal protection from environmental pollution and degradation, but also the right to decent income and employment opportunity. Policy makers need to ensure that a potential conflict between these two rights is mitigated at the initial stage of environmental rehabilitation. Furthermore, if governments only partially protect their population and remain indifferent to the needs of 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 have been well documented. These consequences also have strong links with chronic poverty due to health problems and/or premature death. Apart from undermining the quality of life of men, women, and their families, this issue has broader implications for national economic development.

Chain Reaction: Adopting a participatory approach to assessing environmental degradation and developing alternative income generating and/or employment schemes will build trust and credibility, which, in their turn, may elicit more commitment to environmental protection from men and women.

Possible Interventions and Entry Points

- ✓ **Research:** Studies that assess environmental degradation often fail to note disparities among 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. This should also be complemented by studies on employment and income-generating opportunities for the men and women affected by environmental degradation and rehabilitation programmes.
- ✓ **Gender impact assessments of environmental policies** and emergency environmental actions: Before and after environmental protection and clean-up policies and programmes are implemented, a gender impact assessment should be undertaken to identify how such actions will affect men and women differently.

NOTE: This is by no means suggesting that environmental damage should be ignored because solutions may have a negative gender impact – quite the opposite. The objective is rather to research and analyse the impact of environmental protection actions so that appropriate policies can be put in place that would minimize any such negative effects while protecting the long-term sustainability of the environment.

- ✓ **Capacity-building and technology transfers:** This would involve carrying out training workshops on new environmentally sensitive technologies for men and women. The key to the adoption of these technologies is using appropriate technologies both from a gender perspective and an environmental one. This could be achieved through international collaboration and sharing experiences.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
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.	Long term illness resulting from exposure to environmental hazards	Medical statistics National statistics Administrative data
Male : female ratio of new jobs created in the area and/or sector affected by rehabilitation of the environment (includes informal and formal sectors)	National, regional, local	Differential impact of environment rehabilitation programme or project on men's and women's livelihoods	Secondary industries and spin-off sectors that are reliant on natural resources (processing plants, taxi drivers, etc.)	Survey

IV. Energy

What is the Issue? What is the Goal?

Until recently, it was assumed that the production, consumption, and the end use of energy relating to purposes such as washing, food preparation, heating and lighting of houses and streets, and/or the use of motor vehicles was gender neutral. However, a closer investigation of this issue reveals the presence of gender differentials in energy production, usage, preferences, and attitudes towards primary energy sources and energy carriers.

Some research findings have indicated that women in industrialized countries generally use less energy in the household and on transportation than men.⁴ There are also gender differentials in the forms of energy used by men and women. Women rely more on household appliances (washing machine, vacuum cleaner, refrigerator, toaster, gas and/or electrical stove, etc.), while men tend to use various communications equipment (computers, etc.) to a larger extent. However, it is usually men who choose which of the large household appliances to purchase. The explanation for this is that men tend to be regarded as more technically proficient than women, and in most instances in control of the family budget.

Another important gender difference is the intensity of use of a particular appliance and/or transportation unit to measure the direct and indirect emitting capacity of men and women. On average, the emitting capacity of women at the household level may be larger than that of men because of cooking, washing, ironing, light use, etc. These differences could be taken into consideration by policy makers in their efforts to stimulate the production and use of energy-saving household technologies.

Studies on energy consumption in some countries showed that poor households generally spend more on energy/fuel than wealthier households in terms of income share (e.g., poor households in the United Kingdom spend more than 20 percent of their income on fuel). As women prevail among the poor, it could be safely assumed that more women live in “fuel poverty” than men.⁵

BOX: Poverty, Environment, and Energy Use in Montenegro

A key factor through which the environment and living standards of the poor are linked is through the use of “dirty fuels.” High electricity prices (4.85 Eurocents per KWh, higher than in many other countries in the region) in combination with low income levels and harsh winters—especially in the mountain areas, where most of the poor of Montenegro live—produce a poverty trap. Consequently, to heat themselves the poor have to rely on firewood.

However, poor management of forest resources means that wood tends to be harvested illegally. This leads to the further degradation of already shrinking forest resources and undermines future income and growth opportunities for the poor. Meanwhile, others among the poor, such as the elderly or single parents living in urban areas, cannot afford electricity at current rates and do not have access to alternative fuel sources. For both groups of the poor, the safety net is not adequate in covering them for such seasonal energy demands.⁶

In some of the CIS and Central and Eastern European countries, which have recently experienced a dramatic contraction of output and, hence, unemployment and impoverishment, many households have to resort to fuel austerity. Moreover, the feminization of poverty in such countries was further

⁴ See, for example: Clancy and Roehr (2003); Clancy, Stienstra, Gregory and Cornland (2001); de Melo Branco and Roehr (2002).

⁵ Waddams (2001).

⁶ World Bank (2006).

aggravated by male labour migration and forced resettlement. With the prices of electricity and fuel constantly rising, women will suffer more than men from a deepening of “fuel (or energy) poverty.”⁷ According to some estimates, the proportion of household expenditure for utilities in poor households may increase up to 70 percent by 2007— in, for example, Tajikistan, Serbia, and Montenegro.⁸

In conflict-affected countries in the region, the patterns of energy use have become similar to those in developing countries. For example, there is an increasing reliance on biomass, particularly wood but also coal and kerosene, especially for carrying out household chores. In addition to rising energy prices, the decay of public energy infrastructure causes frequent interruption of heat and energy supplies and adds to the burden of low-income families in these countries. According to some estimates, people living on welfare benefits in Armenia, Georgia, Moldova, and Uzbekistan spent 30-61 percent of their budgets on utilities in 2003.⁹ In Moldova, the proportion among pensioners, a social group with high proportion of women, was more than 37 percent.¹⁰

The energy sector as a whole is male dominated. Among energy professionals men constitute the majority. They also prevail among policy makers associated with the development of the sector. Women tend to be particularly underrepresented in the governmental organizations responsible for important issues such as waste management, reduction of air pollution, and soil and water contamination linked to the production and use of energy.

BOX: Fuel Poverty and Health

The connections among wood use, cooking, and the epidemiology of respiratory and other illnesses is a topic of current research. One consistent pattern linking energy, environment, and health has already become alarmingly clear: Wood burning in confined, often unventilated indoor areas on traditional stoves is a major source of concentrated air pollutants, including a number of carcinogenic organic compounds.

Numerous studies demonstrate a consistent positive correlation between exposure to smoke from indoor biomass burning and acute respiratory infection and chronic lung disease. It is clear that long-term exposure to biomass smoke elevates the risk of a child developing acute respiratory infection by 100 to 400 percent.

Women and children are the primary victims of indoor pollution as they have the greatest level of exposure. Women also bear the main burden of energy poverty in other respects. Rural energy consumption and production revolve around the household as the basic unit of rural economic activity in almost all developing societies, and the vast majority of household roles, including those relating to energy, fall disproportionately on women.

Changes in the prices and availability of household fuels can have significant impact on the allocation of women's time, their need to earn income, household nutritional levels, agricultural productivity, and the household's use of biomass resources. The relationships among rural energy, household labour allocation, and family health and nutrition are complex but merit serious consideration in the formulation of rural energy policies and strategies. Aspects that are often overlooked and should be understood are women's control over household resources and incomes,

⁷ Usually, energy poverty is defined as insufficient access to modern energy sources, such as electricity and natural gas. Water poor households are those that do not have access to modern water services. Some analysts use the affordability concept to identify those suffering from “energy poverty” (Fankhauser and Tepic (May 2005).

⁸ Ibid., p. 20, table 5.

⁹ Ibid., p. 24, table 7.

¹⁰ Ibid.

the influence of men's roles in extra-household decision-making institutions and how all these issues affect and are affected by rural energy development strategies.

It is clear that because of their central role in household energy supply and use, women should be at the focus of rural energy development strategies.¹¹

In many countries of Europe and Central Asia women dominate home-based industries and small- and medium-sized enterprises (SMEs). Access to affordable and clean energy sources and efficient devices is crucial for the survival of their businesses. Therefore, they have vested interests in solving problems arising from the present patterns of energy production and consumption. As the experience of many countries attests, even a slight improvement in this respect brings significant benefits to both men and women.¹²

*The **goals** of gender mainstreaming here are thus:*

- To ensure that men and women have equal representation in decision-making with regards to policy and policy instruments aiming to change the established patterns of energy production and consumption.
- To ensure that corrective measures intended to mitigate negative effects of energy production and consumption take into consideration their gendered impact in order to avoid undermining the opportunities to better the lives of poor men and women.
- To identify new possibilities of improving income and employment for both men and women that could be brought about by new sources of energy and/or new energy-efficient methods and technologies.
- To ensure that men and women have equal opportunity for learning and information acquisition regarding the links among energy production and consumption, environmental degradation, and the feasible solutions of existing problems.

Why Bother?

Justice: Women and men have the right to energy, but they also have the right to a better quality of life both in terms of energy benefits and a clean environment. It is of paramount importance to ensure that women have an opportunity to make their voices heard and to make their own choices regarding primary energy sources, forms and carriers of energy, and labour-saving devices.

Quality of life and efficiency: The gendered benefits of using clean energy types and efficient energy carriers and devices include better health; savings of time and money; improved access to education, information, and the marketplace; more productive labour; and a better environment.

Chain reaction: Adopting a participatory approach to assessing the complex links among environmental degradation, energy production and consumption, and specific roles of men and women as energy producers and consumers as well as designing solutions that take into consideration all dimensions of the issue (social, economic, and environmental) will ensure support and, hence, sustainability of both the environment and human development.

¹¹ World Energy Council and Food and Agriculture Organization (FAO).

¹² In Tunisia, for example, the supply of households with energy in the form of electricity had a double effect on women's life: a significant reduction of time spent on fuel collection and cooking, and access to television, which improved women's awareness of political events and greater knowledge of the world, giving them confidence to speak out and take up leadership roles (Chaieb and Ounalli, 2001); the implementation of the programme promoting fuel efficient stoves in Madagascar brought significant annual savings to households involved (Clancy (2003)).

Possible Interventions and Entry Points

- ✓ **Research:** There is a need to further clarify the complex relations between energy, environment, and gender in countries of Europe and the CIS, especially, in light of an increasing incidence of energy poverty. There is also a need to employ gender-sensitive indicators to measure the intensity of energy use, emitting capacity, affordability, and accessibility of clear energy.
- ✓ **Awareness campaign:** The sophistication of environmental issues, including the energy/environment nexus, requires continuous campaigning and advocacy in order to achieve maximum outreach to both men and women.
- ✓ **Household and SME surveys:** Household and SME surveys are necessary for identifying changes in gendered energy consumption patterns and practices as well as for the evaluation of costs and benefits accruing to men and women as a result of implementation of energy conservation and efficiency measures and the introduction of new technologies and devices.
- ✓ **Capacity-building and technology transfers:** This includes organizing training workshops for men and women on green accounting, eco-housing, autonomous renewable energy systems, business energy analysis, and targeting their specific needs.

BOX: Biogas: A Solution for Rural Women

Action for Food Production (AFPRO), an Indian NGO, has been actively promoting the use of biogas as a way of improving living conditions for rural women along the following lines:

- Saving time in cooking
- Saving time in collection of fuel wood
- Making kitchens smoke free, thus less hazardous to women's health
- Utilizing slurry in the kitchen garden, thereby increasing nutritional status of family and possibly income
- Lowering demand for fuel wood and, thus, freeing money for other uses
- Involving women in building and installation of biogas equipment, thereby expanding income generating opportunities for women in rural areas

This lesson from India, if replicated, could bring important benefits to rural and suburban populations in the CIS countries, where many men and women—faced with a shortage of income opportunities and the escalation of energy prices—have to increasingly resort to the use of wood as a source of energy. On the other end of the spectrum, there has been a rapid accumulation of bio-wastes in the suburbs of large cities. These garbage sites have become a source of pollution, infection, and a threat to wild animals and underground water springs. Setting up such biogas plants could help solve both problems.¹³

- ✓ **Dissemination of information:** One important step would be the creation of websites on energy efficiency initiatives at the national and local level which will provide information on existing public programmes, incentive schemes, funds, and projects; energy saving technologies and appliances; and consumer guidelines for energy conservation and efficiency.

¹³ INFORSE (2004)

CASE STUDY: Clean Energy for Rural Communities in Karakalpakstan

This pilot project is intended to demonstrate the potential for using renewable energy systems to provide small amounts of electricity to encourage sustainable development. Fifteen solar home systems (SHS) were installed in November 2003 in Kostruba, Karakalpakstan. The SHS were intended to provide households with lighting, radio, and television. After installation of the systems, 25 people were trained in their operation and maintenance.

The electricity that these SHS projects will provide is likely to improve the lives of women and children, allowing them to have better household lighting. This reduces the negative health effects from burning wood and diesel, and reduces the chance of accidental fire. However, better lighting also allows a longer working day, which may further reduce a woman's leisure time.

The project planners did not perform gender disaggregated energy analysis before they made decisions about the project, despite the fact that it has been well established in the literature that it is crucial to perform such analysis when working with domestic energy. The project designers assumed that the project automatically would be equally beneficial for men and women. As a result of this thinking, women were not consulted in advance as to their views on how best to prioritize their energy needs.

Findings:

- Women are the main domestic energy users; women and children spend the longest time inside the house and will be the main users of the SHS.
- Women carry the burden of everyday fuel collection for their domestic cooking and heating needs. Even the limited supply of electricity that these SHS would provide could make a dramatic difference in their daily schedule;
- Currently only the male population in Kostruba is aware of the project's objectives; only men participated in discussions about project implementation; and only men were targeted for training and instruction about the SHS systems.

The level of patriarchy seen in Kostruba complicates the project implementation. If these projects are successfully implemented targeting both women and men, they may slowly encourage awareness-raising about women's rights in general and empowerment of village women in particular.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female ratio of top-level energy decision makers	National	Gender balance in decision-making positions	Awareness of or commitment to gender equality issues by either men or women	Survey National statistics
Male : female levels of awareness of the links between environmental degradation and energy production and consumption 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	Impact on environment and gendered cost and benefits	Sociological survey

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female levels of awareness of ways and means to improve energy efficiency 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	Impact on environment and gendered cost and benefits	Sociological survey
Male : female levels of awareness of new technologies and home appliances that could improve energy efficiency both at the work place/store and home 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	Impact on environment and gendered cost and benefits	Sociological survey
Male : female accessibility to and affordability of clear energy measured pre- and post-interventions	National, regional, local (depends on intervention)	Accessibility and affordability of clear energy	Impact on environment	Household survey
Male : female per capita energy consumption measured pre- and post-interventions*	National, regional, local (depends on intervention)	Differences in level of change between men and women indicate how well intervention targeted men and women	Gender equality	Household survey
Male : female per capita use of energy RD-2*	National, regional, local (depends on intervention)	Gendered contribution to resource depletion pressure	Gender equality	Sociological survey
Male : female per capita energy consumption UP-1**	National, regional, local (depends on intervention)	Gendered urban environmental pressure	Gender equality	Sociological survey
Male : female electricity consumption***	National, regional, local (depends on intervention)	Gendered air pollution pressure	Gender equality	Household survey
Male : female share of private car transport UP-4****	National, regional, local (depends on intervention)	Gendered air pollution pressure	Gender equality	Household survey

*The amount of energy consumption per capita in urban areas by end-uses and sources in ton of oil equivalent (TOE) per year. NB: This indicator includes energy consumption and emissions of CO₂.

** Total annual end use of energy in the form of electricity, fuel, and heat by all economic sectors, expressed in Joules per capita per year.

***Total annual amount of electricity consumed by all economic/societal activities. The unit of measurement is GWh/year/capita.

**** The kilometres traveled by private car per year as a percent of total kilometres traveled by passengers in urban areas.

V. Biodiversity

What is the Issue? What is the Goal?

Sources of biodiversity are disappearing at an unprecedented rate. Each gene, species, or ecosystem lost reduces our options for adapting to change. Many subsistence farmers rely on a wide range of endemic crop and livestock types as the higher-yielding genetically modified varieties do not always succeed in new environments. This diversity, however, is disappearing at an alarming rate, and 75 percent of today's food is generated from just 12 plants and 5 animal species. Only 200 out of 10,000 edible plant species are used by humans; and only three plants—rice, maize, and wheat—contribute nearly 60 percent of all plant calories and proteins consumed by humans.¹⁴

This loss is compounded by even more rapid disappearance of knowledge of biodiversity. Local-level biodiversity and environmental integrity are maintained through acquired knowledge and experience. Knowledge relating to endemic natural resources, especially among peoples who have a close relationship with complex natural ecosystems, is referred to as Traditional Ecological Knowledge (TEK). A gender perspective in the area of TEK is especially important as more than 50 percent of agricultural production worldwide is undertaken by women, thus inextricably linking agro-biodiversity, gender, and food security. Although in some parts of the world (mainly industrialized) the number of women and girls involved in agricultural production is decreasing, it remains an important part of local sustainable livelihoods. In Albania, for example, upwards of 57 percent of women are employed in the agricultural sector. Gender differentials in other forms of sustainable livelihoods are apparent in fishing and animal husbandry. In agrarian societies and indigenous communities throughout the world, men and women still perform different functions in their relationship with their environment. Thus, their impact on biodiversity is gendered. Also, because many laws, customs, and cultural practices affect access to biological resources differently for men and women, gender inequalities are often accentuated.

Gender differentials are also accentuated by economic differences. For many poor people living in the CIS, the collapse of public fisheries and commercial fur farming, coupled with the overall decline of job opportunities, has resulted in a rise in fish poaching and illegal wild animal hunting. The difference in the price paid to the supplier and the price paid by the final buyer is large, but the greatest risk of being arrested and imprisoned is born by those at the bottom of the production-marketing chain. Men and women involved in these illegal activities perform different functions, to some extent reflecting traditional gender roles. It is women, for example, who are marketing caviar in informal markets throughout CIS countries, while men are involved in illegal fishing and hunting.

Other examples of the different roles and knowledge men and women have in relation to natural resources in countries in transition is the employment of men in timber logging, wood milling, and the production of cellulose, paper, construction materials, and furniture heavily depends on the forest ecosystem. Women, especially the elderly, in the Ural, Siberia, Far East, and other regions of Russia as well as in Belarus and Armenia generate additional income by selling wild berries, mushrooms, and medicinal plants. In some parts of the CIS, an increasing number of families have been setting up small-scale commercial bee-gardens, which produce varieties of honey and bee products (royal jelly and ambrosia) for local markets. Whereas men are directly managing bee-gardens, women are marketing bee-products at local markets.

Considering their different roles and knowledge in interaction with natural resources, a failure to target both sexes in biodiversity conservation initiatives inevitably leads to a loss of knowledge and produces a gender bias in policies and programmes.

¹⁴ Lambrou and Laub (2006)<http://www.wider.unu.edu/publications/rps/rps2006/rp2006-69.pdf>.

*The **goals** of gender mainstreaming against this background should be as follows:*

- To ensure that men and women are **fully aware of the relationship between their livelihood, the ecosystem they inhabit, and its biodiversity.**
- To ensure that men and women have equal **representation in decision-making with regards to policy and policy instruments** aiming to conserve and/or restore the biodiversity of ecosystems at all levels.
- To ensure that all policies and measures aiming at **conservation and restoration of biodiversity take gender into account and consider their gendered impact.**

Why bother?

Equality: Men and women both benefit from biodiversity, although their patterns of interaction with and consumption of bio-resources may differ. Therefore, men and women must have equal representation in the local, regional, and national governmental bodies whose decisions could affect the state and supply of bio-products and services.

Efficiency and Sustainability: Direct involvement of men and women in the formulation and implementation of government programmes and projects aiming to preserve bio-diversity may significantly improve their efficiency. Moreover, such programmes and projects may significantly benefit from incorporating gender-specific knowledge about bio-diversity and local eco-systems, thereby helping to ensure their sustainability.

Sustainability: Failure to target both men and women in biodiversity conservation and agricultural and rural development initiatives inevitably leads to a loss of traditional knowledge at all levels. From the perspective of local level conservation, traditional ecological knowledge is needed for food security, which has an immediate impact; from an international perspective, the loss of traditional ecological knowledge could result in long-term detrimental effects on biodiversity conservation.

CASE STUDY: Conservation and Ecotourism in Kyrgyzstan

In Kyrgyzstan, the majority of the rural population subsists on farming, particularly animal husbandry. People tend to invest in livestock rather than in land. The strong reliance on livestock has resulted in the degradation of much of the country's mountainous reserves, thereby endangering the endemic deer population, the Tian-Shan-Maral (a World Conservation Union IUCN red-listed species). A partnership involving the indigenous population, a local non-governmental organization (NGO), and the regional government led to the country's first legally confirmed project where an NGO (as a representative of civil society) entered into agreement with the government.

The project resulted in the protection of 50 hectares of land and the establishment of a nursery for the rearing of Tian-Shan Marals, which became a viable eco-tourism venture. Women were pivotal to the success of the project, playing a lead role not only in the business planning of the eco-tourism venture but also in the maintenance of its facilities. Men were predominantly involved in the building of fences around the nursery. The project has resulted in nearly 100 visitors to the protected area and, in turn, income generation for the community. The project was successful as a result of its holistic environmental approach to management, which integrated women in sustainable income generating activities with environmental protection and biodiversity conservation¹⁵.

¹⁵ UNDP GEF SGP project: *Rehabilitating and increasing the Tian-Shan Maral Population.*

Possible Interventions and Entry Points

- ✓ **Research:** It is important to continue studying gender-specific contributions to the decline of biodiversity as well as the impact of various solutions (social, economic, institutional, and technological) in order to increase the effectiveness of policies and measures aiming to conserve and/or rehabilitate the biological diversity of various ecosystems.
- ✓ **Household surveys:** Sociological surveys at the household level can help policy makers identify the different roles that men and women play in the management of bio-resources at the household and community level as well as sustainable practices developed by men and women.
- ✓ **Awareness campaign:** It is necessary to improve public understanding of the contribution of biodiversity to human well-being, including income, by designing communications strategies and information campaigns in a way that addresses the needs of both women and men.
- ✓ **Capacity-building and technology transfers:** This includes organizing training workshops for men and women designed to improve the efficiency of their use of biological resources.
- ✓ **Setting-up a gender group at all levels of policy-making and implementation:** This is necessary to ensure that all policies and measures take into consideration gender-specific concerns as well as the skills and capacities of men and women to contribute to the conservation and rehabilitation of biodiversity.
- ✓ **Pilot projects:** Designed for different ecosystems and combining biodiversity conservation and/or restoration with income-generating activities for both men and women.
- ✓ **Situation/Stakeholder Analysis:** The development of any project requires an assessment of the initial situation in order to identify: drivers (factors/threats to biodiversity, including reasons, incentives, etc., that force men and/or women to act destructively in respect to biodiversity), stakeholders (interest groups/communities, governments and international agencies, private sector representatives, experts), barriers/constraints to change (cultural, financial, administrative, etc.), and local ideas/initiatives upon which a project could be built.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female levels of awareness of the links between their economic activities (production and consumption) and biodiversity 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	Impact on environment and gendered cost and benefits	Sociological survey
Male : female levels of awareness of ways and means to reduce negative human impact on biodiversity 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	Impact on environment and gendered cost and benefits	Sociological survey
Change in traditional land-use practice LB-6, by gender*	National, regional, local	Gendered potential maintenance of biodiversity	Impact on environment and gendered cost and benefits	Sociological survey
Male : female environmental income**	National, regional, local (depends on intervention)	Income derived by men and women from ecosystem**		Household income survey

* Changes in traditional high-value farming practices resulting in homogenization of land use and loss of habitat and species diversity. Unit of measurement is change (loss/gain) in number of different habitat types **per rural holding** from an appropriate baseline year. This indicator measures the potential maintenance of biodiversity by the use of traditional as opposed to intensive land management and use practices. It relates to the impact on wildlife as well as crop and livestock diversity.

**Environmental income is an income derived by men and women from the exploitation of bio-resources (plants and animals).

VI. Water

What is the Issue? What is the Goal?

Water is critical for the proper functioning of the ecosystem just as it is for the proper functioning of humankind, and both needs are critical to sustainable development. Men and women have different stakes in, and derive different benefits from, the availability, use, and management of water. Understanding gender differences and inequalities is fundamental to all efforts aimed at improving water supply, sanitation, and water resources management.

Recently adopted national water codes in many Central and Eastern European countries and the CIS remain deficient and contradictory. Weak enforcement further contributes to water-related challenges. In addition, the inclusion of a gender perspective in management is rarely considered.¹⁶ Further exacerbating the situation is the decaying water and sewage infrastructure, which causes cross-contamination and enormous loss of water due to leakage (estimated at more than 50 percent¹⁷). Therefore, even if men or women, at the individual level, are aware of the problem of wasting water, they have limited opportunity to change the situation without government support and commitment.

At the household level, however, gender differences in water use are more apparent. Water use is important from a gender perspective since in many regions water tends to be scarce or certain social groups tend to lack continuous, reliable, and efficient access to water. Therefore, water consumption patterns and conservation becomes increasingly important. On average, women use more water than men as they tend to perform more household chores compared to men: washing, cooking, cleaning, and gardening. Their usage of water is affected by their attitude toward water (in terms of its value) as well as by the quality of their home appliances. Men at the household level usually bear responsibility for the maintenance of water and sanitation equipment as well as for selecting the household appliances.

It is important to keep in mind that gender differentials are usually more pronounced in rural areas than in urban ones. Rural populations tend to use more water than urban ones, primarily due to the needs of agriculture, which is the largest water consuming activity in most countries. The commercialization and industrialization of agriculture that give rise to agricultural economies of scale further aggravate the water deficit—especially within countries with fragile eco-systems as in Central Asia and the Mediterranean region. In Central Asian countries, the share of agriculture in the overall consumption of water is more than 90 percent.¹⁸

The rural and urban divide is also pronounced for access to sanitation. In some Central Asian countries such as Tajikistan and Uzbekistan, upwards of 55 percent of the rural population lack access to adequate sanitation. This has far-reaching repercussions in society. In the CIS region, universal primary education and girls' education face challenges similar to those in the rest of the developing world – poverty, political instability, gender discrimination, geographical disparities, and the lack of potable water and adequate sanitation. For example, one of the main obstacles to school attendance by adolescent girls is the absence of separate sanitation facilities.¹⁹

¹⁶ www.gender.cawater-info.net/index_e.htm.

¹⁷ World Bank <http://wbIn0018.worldbank.org/eca/eca.nsf/66d6f5004ed085ca852567d10011a8b8/ad6f9cc72506e7ab852567f5000458ed?OpenDocument>.

¹⁸ Regional Environmental Action Plan for Central Asia.

¹⁹ GAP.

Pollution and contamination of water is another growing problem in Europe and the CIS countries, which both men and women contribute to and suffer from. The most common sources of pollution are human and industrial waste, chemicals, and agricultural pesticides and fertilizers. Currently in Europe an estimated 120 million people, i.e., one person in seven, do not have access to safe drinking water and adequate sanitation, making them vulnerable to water-related diseases, such as cholera, bacillary dysentery, coli infection, viral hepatitis A, and typhoid.²⁰

At the household level, gender differentials in the use of water vary depending on the status of the household and the household head (urban/rural, high/low income, private/public housing, high/low level of education, cultural value system, etc.). An increasing consumption of detergents, dish and body soaps, and other toiletry as well as water purifying filters and bottled water has been observed among women. These patterns signal two different stories: On the one hand, they indicate an improvement in quality of life, increased accessibility of products (which were in short supply in the past), and growing concern about the quality of tap water; on the other hand, increased use of chemicals in the performance of household chores contributes to water pollution, as old public water purifying plants are not equipped to deal with many modern chemicals now used in the production of household detergents and toiletry. A distinctly male pattern of water use in urban areas includes car-washing and the watering of private suburban plots, resulting in pollution of the aquifer with gasoline residue, detergents, and/or fertilizers and pesticides.

In some countries in transition the large cities and, especially, the capitals may soon face an aggravation of the water pollution problem due to the impact of illegal migration, homelessness, and urban poverty. Illegal migrants and homeless men and women live in precarious conditions—often in overcrowded apartments or in flimsy shelters constructed out of carton, pieces of wood, and other scraps. These units usually lack even basic amenities, such as tap water or lavatory facilities, and thus out of necessity these men and women are forced to use streets and/or other public places for their bodily functions.²¹ This is a major concern for women not only from a health and hygiene perspective²² but also from a safety one. Women typically wait until dark to use public lavatories, thereby unwillingly exposing themselves to a potential risk of assault and violence.

Apart from these marginalized social groups, the total number of urban poor is also on the rise in some countries of the region. In the CIS, urban poor live in aging houses with collapsing water and sanitation networks, often with basements submerged from drainage and broken water pipes. In some districts, frequent interruption or sporadic access to drinking water is a norm, and the dwellers, mostly women, have to look for other sources of water.

In many countries a lack of access to water and sanitation occurs at a higher percentage in rural households and particularly affects women, because:

- A large percentage of rural households are not connected to public water and sanitation infrastructure and have to rely on local sources of drinking water (artesian wells and/or springs) where women spend considerable amounts of time fetching water.
- Many rely on primitive outdoor lavatories that contribute to diseases (see footnote, below).
- There is high exposure to water contaminated by chemicals, fertilizers, and pesticides, especially in areas of irrigated and/or highly intensive agriculture, which can contribute to birth and reproductive defects and ailments.

²⁰ UNECE (2004).

²¹ Svobody (2006).

²² When women wait for hours, even the entire day, to use a lavatory they frequently develop bladder, urinary tract, and kidney infections that can become chronic or even fatal.

BOX: The Impact of Water Pollution on Health

The Republic of Karakalpakstan – whose 1.5 million people live around the delta of the Amu-Darya, one of the two rivers that feed the Aral Sea – is believed to be the most polluted area of the Aral Sea Region, posing a serious health risk both to its population and to that of future generations.

Polluted and unsafe drinking water is an urgent and major problem. Currently 65 percent of piped water in Karakalpakstan does not meet chemical standards for drinking water and 35 percent falls below bacteriological standards.

Health in the Aral Sea region is declining in parallel with the worsening ecological situation. Over the past 15 years local scientists have reported increasing rates of maternal and infant morbidity and mortality, anaemia, kidney and liver diseases, allergies, cancer, mental disorders, tuberculosis, birth abnormalities, miscarriages, and complications during pregnancy and childbirth. Average life expectancy in Kzyl-Orda, Kazakhstan, has declined from 64 years to 51.

Women and children are the most vulnerable. Maternal and infant morbidity and mortality are significantly higher in Karakalpakstan and Kzyl-Orda than in other parts of Uzbekistan and Kazakhstan. Official statistics show, for example, that maternal mortality in Karakalpakstan in 1998 was 60.6 per 100,000 live births, and infant mortality 24.3.

An investigation of some 5,000 women of reproductive age in Karakalpakstan has shown that:

- 87-99 percent have anaemia
- 90 percent have complications during pregnancy and childbirth
- 30 percent have kidney diseases in pregnancy
- 15 percent have a miscarriage
- 23 percent have thyroid pathology, mainly goiter and hyperthyroidism, probably due to iodine deficiency

The blood, endocrine, and immune systems are all affected. Anaemia, which has been on the increase for the last 15 to 18 years, is the region's greatest health issue and is found in almost all women – teenagers and both pregnant and non-pregnant women. As pregnancy develops the problem worsens: About 70 percent of pregnant women in Karakalpakstan have severe anaemia by the third trimester, and the situation is similar in Kzyl-Orda. Most women with severe anaemia have complications during pregnancy and delivery, including hemorrhage. Some 87 percent of newborn babies are also anaemic. Untreated anaemia in pregnancy and young children poses a high risk of many other diseases, and leads to weak immune systems and the risk of brain damage²³.

*The **goals** of gender mainstreaming should be as follows:*

- To ensure that men and women have **equal representation in decision-making with regards to the use of water resources and sanitation** at all levels.
- To ensure that men and women have **equal representation in decision-making with regards to policy** and policy instruments aiming to improve water management at all levels.
- To ensure that all **policies and policy measures take into consideration the gendered impact of water scarcity and pollution.**

²³ Ataniyazova.

Why Bother?

Equality and Justice: Women and men have an equal right to life-giving water and, therefore, are entitled to equal participation in decision-making regarding the use of water resources. A basic personal amount of water is needed to ensure survival and dignity.

Efficiency and Sustainability: Direct involvement of men and women in the formulation and implementation of government programmes and projects aiming to protect water resources will significantly improve their efficiency. Moreover, such programmes and projects will significantly benefit from taking into consideration gender specific use patterns and concerns as well as the health impact of water pollution.

CASE STUDY: Overflows of Sewage in Ukraine

In Ukraine the cleaning of railway oil tanks combined with an inadequate sewerage system caused overflows of sewage into houses and onto the streets. When women approached the local authority, they were denied funds to address the problem. With the help of an environmental NGO, women met with residents, launched a political campaign, and filed a legal suit against the local authority. As a result, the government allocated resources to finish construction of a sewage pump, financed environmental works, and closed the hazardous oil-tank cleaning facility.²⁴

Possible Interventions and Entry Points

- ✓ **Research:** It is important to continue studying gender-specific contributions to water-related problems as well as the impact of various solutions (economic, institutional, and technological) on the social and health status of men and women.
- ✓ **Establishment of a database for gendered water and sanitation statistics:** More information is needed for enhanced policy and decision-making.
- ✓ **Household surveys:** Sociological surveys at the household level can help policy makers identify the different roles that men and women play in the management of water and sanitation and in hygiene practices.
- ✓ **Awareness campaign:** Greater awareness means not only better preparedness but also the possibility to take preventive measures to alleviate water-related risks. Resources and information can be found on-line.²⁵
- ✓ **Capacity-building and technology transfers:** This would involve organizing training workshops for men and women to ensure that clean technologies as well as government aid for improving the efficiency of water management and use, are accessible to both genders.
- ✓ **Setting-up a gender group at all levels of policy-making and implementation:** This is necessary to ensure that all policies and policy measures take into consideration gender-specific concerns, skills, and capacities to contribute to the alleviation of the water crisis.

²⁴ Khosla (2002).

²⁵ www.undp.org/women/tools_marketplace.pdf; www.gdrc.org/uem/water/gender/index.html; www.genderandwater.org/page/121; and www.cap-net.org (for tutorials on gender and water).

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 the area of water and sanitation	National	Gender balance in decision-making positions	Awareness of or commitment to gender equality issues by either men or women	Survey National statistics
Male : female levels of awareness of the links between the water use practices and associated problems and their implications for human health and livelihood 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	Impact on water resources	Sociological survey
Male : female per capita water consumption UP-8*	National, regional, local (depends on intervention).	The gendered pressure on water resources	Gender equality	Household survey
Rural-urban Male : female use of various chemicals (at the household level per year)	National, regional, local (depends on intervention).	The gendered impact on water (in terms of pollution)	Gender equality	Household survey
Urban-rural Male : female incidence of water-related diseases	National, regional, local (depends on intervention)	The gendered impact of water pollution	Impact on water resources	National medical survey/Administrative data
Urban-rural Male : female access to drinking water and sanitation	National, regional, local (depends on intervention)	Gender equality	Impact on water resources	National survey
Rural Male : female map of access to water and sanitation	Local and regional	Opportunity lost due to lack of access	Quality of access (basic measure of infrastructure)	Time/use statistics

* The amount of water used in litres per day per capita by the urban population.

VII. Climate Change

What is the Issue? What is the Goal?

It is an accepted fact that climate change will have a significant impact on our living conditions over the coming years. It is already one of the main causes of natural disasters such as floods and droughts. The concentration of greenhouse gases, especially of carbon dioxide (CO₂), in the atmosphere has risen dramatically along with the intensification of industrialization. Emissions from industry, private households, and traffic are constantly increasing this concentration, and the Earth's atmosphere is heating up to an unnaturally high level and at an accelerated pace. If emission rates continue unchecked, a rise of 1.4°C to 5.8°C in the average global temperature is expected by 2100, and sea levels are expected to rise by 10-90 centimetres. The flooding of coastal regions and low-lying island states, desertification, and melting polar ice caps would follow.

Ecosystems worldwide are already experiencing difficulties in their adaptation to such rapid changes in climate. This means that even if there were to be a sharp reduction in the emission of greenhouse gases in the nearest future, serious alterations in climate are unavoidable.²⁶ In terms of policy, the response of the international community to this grave challenge is twofold: mitigation and adaptation. Of course, both women and men will be affected by these measures, but the distribution of the impact will be extremely uneven due to the socio-economic differentials between and within countries and between genders, as described above.

In some Central Asian countries gender differentials in emitting capacity are determined by the rights to assets, which are, informally, biased in favour of men. As a result, men have more resources at their disposal and are more able to acquire and use modern agricultural inputs and equipment. This leads to their larger emitting capacity, on average, than that of women.

Gender differentials in the rights to assets have significant implications. Women, on average, are more vulnerable to external shocks than men, and their adaptive capacity to change is more constrained than that of men. Environmental change is likely to exacerbate both natural disasters and conflict over natural resources at all levels, including gender relations.²⁷ Without secure access to and control over natural resources (e.g., land, water, trees, livestock) women in many countries will be less able to cope with permanent climatic change and less able or willing to make investments in mitigation measures. Women are also less likely to have access to information, such as early warning or about available assistance. Evidence from recent natural disasters confirms that women and children have suffered the most.²⁸ During the 1991 cyclone and flood in Bangladesh, for example, the death rate among women aged 20-44 was 71 per 1000 compared to 15 per 1000 for men.²⁹ Similarly, during the 2005 earthquake in Pakistan the fact that more women were killed than men could be partly attributed to cultural restrictions on female mobility. Because many Pakistani women are not allowed to go outside the household without being accompanied by a male member of the family, a large number of women perished in collapsed dwellings while waiting for their male relatives to come for them.

Link: See Brief on Crises Prevention and Recovery

²⁶ UNEP/IPCC (2001).

²⁷ For example, there is numerous evidence that both domestic violence and violence against women increase during and after a natural disaster (Chew and Ramdas (2005)).

²⁸ According to the estimates of the Global Fund for Women, during and after the natural disaster events of 2004-2005, the female death toll was three times that of males (Chew and Ramdas (2005))

²⁹ Aguilar (2004).

In the aftermath of a natural disaster, women may be denied adequate relief aid or compensation for their losses. This was the case in Sri Lanka, for example, where government authorities restricted access to financial aid by recognizing only male-headed households among the tsunami-affected families.³⁰ And women suffer in other ways as well. For example, the communities in Central Asia affected by the desiccation of the Aral Sea have endured enormous losses in terms of health and livelihoods; but while many men have been able to migrate in search for other income opportunities, women left behind to take care of the household have had to cope with the increasing impact of the dying sea.

This, however, does not mean that women are unable to contribute to the mitigation of and adaptation to climate change. In many agricultural communities, women are at the centre of food production and are in possession of complex adaptive strategies allowing them to cope with seasonable climatic change. They are also responsible for drinking water and fuel-wood supply as well as for waste management. Women's involvement in agriculture, biomass energy, and the marketing of forest and marine products make them one of the key stakeholders in effective environmental management. The experience and knowledge of women is of high value to policy-making and measures as they have a unique perspective on how they can affect and mitigate climate change.

It is important to note that the on-going international negotiations on mitigation and adaptation have not specifically addressed the gendered impact of climate change. So far, the underlying principle of the negotiations has been "gender-neutral." With the exception of a few countries, women's representation in the process at the international and national levels has been very low.

*The **goals** of gender mainstreaming against the above background should be as follows:*

- To ensure that men and women have equal representation in decision-making with regards to policy and policy instruments aiming to mitigate the risk of drastic climate change and destruction of eco-systems at all levels.
- To ensure that men and women have equal representation in decision-making with regards to policy and policy instruments aiming to improve the adaptive capacity of communities throughout the world at all levels.
- To ensure that all policies and policy measures take into consideration the gendered impact of climate change.

Why Bother?

Gender Equality: Women and men have an equal right to a healthy life and decent livelihood. The anticipated climate changes threaten both. Under such circumstances it is of paramount importance to ensure that men and women have an equal capacity to survive.

Possibilities to Reduce the Speed and Strength of the Climate Change Impact: There are technologies to reduce human impact on the environment. By taking into consideration gender differentials and improving access of men and women to such technologies, it will augment the effect of international efforts to mitigate risks and to improve the capacity of humanity to adapt to forthcoming climate changes and their implications for the earth's eco-systems.

³⁰ Chew and Ramdas (2005), p. 3.

Chain Reaction: Adopting a participatory approach to assessing the complex relationship between climate changes and the activities of men and women contributing to environmental degradation, and to designing appropriate mitigation and adaptation policies and policy measures, will raise the effectiveness of these responses while simultaneously reducing gender inequalities.

Efficiency and Sustainability: Taking advantage of the capacities and capabilities of both men and women will enhance the overall effectiveness and sustainability of any policy aiming to reduce the emission of greenhouse gases at all levels (macro and micro).

Possible Interventions and Entry Points

- ✓ **Research:** It is important to continue studying gender-specific contributions to climate change as well as the impact of various solutions (social, economic, institutional, and technological) in order to increase our level of preparedness while mitigating the risks of further environmental degradation.
- ✓ **Household surveys:** Sociological surveys at the household level can help policy makers identify the different roles that men and women play in the management of household resources that affect the environment.
- ✓ **Awareness campaign:** Greater awareness means not only better preparedness but also the possibility to take preventive measures for mitigating threats. Assessment of gender-segregated emission of greenhouse gases at the household level (such as the use of inefficient household appliances, motor vehicles, overuse of lighting, heating, and cooling systems, or the use of dirty fuels, agricultural and household chemicals, etc.) and adequate targeting of information could greatly enhance the opportunities for men and women to take appropriate action to mitigate risks and emissions.
- ✓ **Capacity-building and technology transfers:** This would involve organizing training workshops for men and women to ensure that clean technologies, as well as government aid for improving efficiency and/or adaptive capacity, are accessible to both genders.
- ✓ **Mobilize women's organizations:** Women's organizations throughout the world should be mobilized for collecting and disseminating information on climate change and its gendered impact.
- ✓ **Setting-up a gender group at all levels of policy making and implementation:** This is necessary to ensure that all policies and policy measures take into consideration gender-specific concerns, skills, and capacities to contribute to mitigation and adaptation efforts.

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 the area of mitigation of and adaptation to climate change	National	Gender balance in decision-making positions	Awareness of or commitment to gender equality issues by either men or women	Survey/ Administrative data
Male : female levels of awareness of the links between the climate change and their production and/or consumption patterns 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	Impact on environment and gendered cost and benefits	Sociological survey
Male : female levels of awareness of ways and means to reduce negative impact on environment and improve their adaptive capacity to climate changes 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	Impact on environment and gendered cost and benefits	Sociological survey
Male : female environmental vulnerability	National, regional, local (depends on intervention)	The gendered impact of intervention	Impact on environment	National poverty survey
Male : female per capita consumption of hazardous substances WA-8*	National and local	Impact on environment (waste pressure)	Gender equality	Household survey
Gendered (by ownership) SME's waste per product during a number of products' entire lifetime WA-5**	National and local	Impact on environment (waste pressure)	Gender equality	SMEs survey
Gender-segregated emitting capacity of the household	National, regional, local (depends on intervention)	Impact on environment	Gender equality	Household survey
Male : female emissions of aerosol particles***	National, regional, local	Gendered impact on environment	Gender equality	Household survey

* The total consumption of hazardous substances utilized in households. The definition "hazardous" refers to Council Directive 88/379/EEC of 7 June 1988 on approximation of the laws, regulations, and administrative provisions of the Member States relating to classification, packaging, and labeling of dangerous preparations under dangerous substances for the environment.

Unit of measurement: tons per year/per capita.

** Unit of measurement: kilograms of waste per selected product.

*** Total emissions of aerosol particles at the household level. The unit of measurement is tons of aerosol particles per year/per capita.

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Governance and Participation

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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.”¹ It is manifested 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 that 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.

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.

Link: see the Gender brief on Macroeconomics, particularly Part III: Budgets, for further information

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. Men and women have diversified interests in terms of their various identities as they are differentiated by class, age, ethnicity, place of residence, and gender, among others. Democracy requires each one of these interests to be represented. Gender differences may lead to a gender specific perception of certain social, political, and economic events. But neither gender group always shares the same interest, nor can we assume there is no differentiation within one gender group. However, in politics, 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.

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 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

¹ UNDP (2000), p. 3; UNDP (2003).

out of major public governance structures are profound, and must be addressed before any serious progress can be made.

BOX: Barriers to Female Participation in Governance Structures²

1. General societal and cultural attitudes that 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 that require representation.
3. The lack of a written and citable political commitment to social and gender equality and justice (e.g., a National Plan of Action or other policy document, including legal provisions) makes it difficult to hold governance structures accountable for low female participation.
4. Over domination of men in politics commonly leads to a use of “masculine language.” 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 whom 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 child-care, places women at a disadvantage in terms of time needed to be active in politics.
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.

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.³ Therefore, real change in how a government approaches gender requires attention to four issues:

- **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 percent is necessary.

² This list was compiled based on Ashworth (1996) p. 11, list in *Gendered Governance: An Agenda for Change*.

³ Beall (1996), p. 4.

- **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.
- **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.
- **Attitudes and behaviours** related to gender roles and women's status need to be addressed for any of the related goals to be met.

*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, and that the gender impact of the policies is assessed and, if necessary, corrective measures are taken into account.

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."⁴

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 approximately half 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."⁵ Furthermore, populations have greater trust in governments that are transparent and represent the interests of the entire population.

Efficiency: Research carried out by the United Nations⁶ 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. Moreover, if talented and qualified members of the population (in this case, women) perceive insurmountable and non-objective barriers to their career goals, they are likely to leave the country in search of opportunities elsewhere. This "brain drain" detracts from a country's full economic and social development potential.

⁴ UNDP (2000), p. 2.

⁵ Beall (1996), p. 9.

⁶ UNRISD.

Chain Reaction: It is also important to realize that women in decision-making positions serve as important role models who will inspire other women to stand for and hold public office.⁷

CASE STUDY: Enhancing women's participation through education in Belarus

A project supported by UNDP and the Japan's Women in Development Fund helped to enhance women's impact on the legislative process by providing a series of trainings to 678 women. The project has established a unique gender-oriented university programme at the Institute of business and management technologies of the Belarusian state university, which has enabled more than 30 women to complete master's degrees in business administration.

The project's slogans – “(Wo)man invented the wheel”, “(Wo)man invented the alphabet”, “(Wo)man kindled the fire”, and “It is never too early/late to become a leader” – have encouraged people to take a fresh look at gender inequality. The dissemination of research findings on gender issues, the development of modules for lawyers and journalists, the creation of a statistical book, *Women and Men in the Republic of Belarus* (2003), and similar publications have created a new discourse on gender mainstreaming and human rights. Expertise gained from the project has been used to draft the National Action Plan on Gender Equality for 2006 – 2010, and the gender equality law concept. The share of women in parliament rose to 30 percent during the course of the project; two female project participants have won seats in the lower chamber of parliament

Acknowledgment to: Ms. Alina Ostling, Programme Officer, UNDP Belarus

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. In this respect we can suggest five entry points. The first two are related to the civil service itself. Codes of civil service should include explicit non-discrimination and/or affirmative action principles so that there will be egalitarian representation of each gender group within the services and gender balance will be reaffirmed in restructuring. Second, civil service training should incorporate gender issues and should be gender sensitive. Third, the civil service should be restructured to be more responsive to the demands of civil society, including women's groups, so they become more flexible and policy oriented to integrate women's perception and interests. Forth, advocacy work on gender mainstreaming should target senior officials, who are the policy-makers and decision makers, to foster change in their attitudes. And last but not least, gender impact analysis

⁷ Beall (1996), p. 9

(including gender budgets) can be integrated into the civil service procedures. 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 percent 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 measures* or *affirmative action*. However, in many countries of the Commonwealth of Independent States (CIS) such quotas have been confused with the concept of “quotas” as it was applied in the Soviet system, resulting in a backlash against such affirmative actions. The fact is, however, that in most cases gender balance in public office has been achieved by such affirmative action measures. It is vital that implementation of quotas be accompanied by public awareness campaigns to differentiate it from non-democratic measures and 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.⁸
- ✓ **Establishment of Women’s Auxiliaries within parties:** In some countries political parties have women’s auxiliaries as an integral part of their organization. These organizations serve as schools of politics for women, where there is no competition with men.
- ✓ **Accepting a gender equality law:** This is an umbrella law that tries to ensure gender equality in all aspects of life beyond the constitutional statements of equality. In some countries this law has details regarding implementation and includes description of mechanisms as well.
- ✓ **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 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.
- ✓ **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 other think-tank type NGO that can provide reliable data in collaboration with a government.

⁸ Ibid., p. 10.

✓ **Training strategies for increasing women's political participation:** Low political participation of women 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, this disadvantage can be countered by providing training (to female candidates and women more generally) in areas such as⁹:

- 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
- incorporating gender in education curriculum for civil servants

CASE STUDY: Gender Training for Government Officials in Russia

UNDP supported a high-profile project that aimed to develop and incorporate gender-specific training into the professional training programmes and curricula for government officials and professors of the Russian Academy of Public Service under the President of the Russian Federation and its subsidiaries. This was done in line with international instruments and standards, the Constitution, and the National Plan to Improve the Status of Women. Baseline 'gender modules and clusters' were developed to be included in the training as well as manuals and methodological guidelines to disseminate Russian and international experiences of promoting gender equality. Training of trainers for government officials took place in more than 25 regions at branches of the Russian Academy of Public Service.

Acknowledgement to: Galina Kalinaeva, UNDP Russia.

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 it 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. In many countries of the CIS, such as Russia, Belarus, and Kazakhstan, the transition has led to major problems for men, including low life expectancy at birth. In those countries one reason for a gender backlash is that reactionaries are arguing that gender is turning a blind eye to men's problems and overemphasizing women's empowerment. It is important to reaffirm that gender equality is not only on women's issues and that men's problems also have to be addressed. Consequently, trainings should be organized not only to integrate men to form mixed groups, but should specifically target men as well.

⁹ List adapted from Hamadeh-Banerjee (2000), p. 12.

CASE STUDY: Promoting Gender Equality in Lithuania

Promoting equal opportunities and gender equality is high on the agenda of the National Human Rights Action Plan of Lithuania. With UNDP support, the Ombudsman Office for Equal Opportunities, established in 1999, has been particularly instrumental in responding to gender needs, ensuring greater use of gender analysis and empowering women through awareness raising and advocacy campaigns. As a result, the parliamentary elections in October 2004 have produced the biggest ever proportion of women in parliament: 29 women out of 141 MPs (20.6 percent).

Acknowledgment to: Ms. Ruta Svarinskaite, UNDP Lithuania

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
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 of members 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
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
Percent of national government expenditure targeted at gender mainstreaming and gender equality initiatives	National	Financial commitment to attaining policy goals on gender equality	It is worth noting 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

II. Local Governance: Decentralization, Community Planning, and Service Provision

What is the Issue? What is the Goal?

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. In few places has gender balance actually been achieved. Representation of women in local and national politics varies in the world. Where as in some countries, such as Turkey and Azerbaijan, female representatives are few in elected local positions, there are some Western societies where there is a higher proportion of female representation in local governments in comparison to national governments.

In countries where there is a strong patriarchal culture but there are local elections, both men and women tend to downplay the importance of women in their own community. In most societies male and female voters may associate power positions with men only. In small constituencies this becomes a particularly significant hindrance for women candidates. Their families may not want them to run for office, thinking that they will be an outsider and a cause of embarrassment. The community may not vote for them because they may be perceived as threatening the local social and cultural boundaries.

At the same time, there is also a counter tendency. Women tend to be close to local issues, such as the education system and community services, etc. They are the primary users and consumers of these services and, consequently, they may be more interested in local politics and feel more competent to deal with them. Further, women may want to have “one of their own” in power. 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 the knowledge of men and women alike 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. In some countries refuges for protecting women from domestic violence and trafficking are run by local governments and municipalities. Women in local councils tend to ask for the allocation of resources to support such activities and to pressure local authorities

towards opening such institutions. Bringing community men into this loop of participatory decision-making and understanding their needs and perspectives might also encourage more male involvement in areas connected to social reproduction.

Link: See also briefs on HIV and AIDS and health

- **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, 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 housing design, zoning, and site lay-out.¹⁰ Amongst examples of such women-specific needs are community centres, easily accessible health centres, crèches (day-care centres), and refuges.

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. Such a unique knowledge should be used as incentive to integrate women into local politics. Furthermore, men and women often have different transportation needs: While men tend to make more use of private transportation, including services provided by the work place, 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.

- **Local politics as a stepping stone for national politics:** The most important significance of local politics on gender relations is that the issues at stake are vital for women, and women can indicate an interest in these areas. They can express knowledge and opinions, and they can make choices. Hence, women need to be promoted in local politics as a stepping stone for national politics.

CASE STUDY: Local Self-Government Elections in Armenia: Capacity-building Training for Women

Low representation of women in political life in the countries of the South Caucasus, including Armenia, has led to the concern that the skills and potential of women are not being adequately utilized to address the region's social and economic problems. Moreover, experience shows that often women elected in the local governments still need continuous support to enhance their leadership, public administration, and governance skills to efficiently meet the responsibilities assigned to them.

UNDP Armenia's "Gender and Politics in Southern Caucasus" programme partnered with the UN Development Fund for Women (UNIFEM) and the Organization for Security and Cooperation in Europe (OSCE) to provide leadership and election preparation training and capacity-building for women running for local elections. The training series was organized in Yerevan and ten regions of Armenia for potential women candidates and for women community leaders. The series was held one month before the start of local elections in 2005 to serve as an impetus for participation.

The two-day training program covered 1) leadership and women's role in community mobilization and 2) local self-government elections; and was comprised of interactive discussions, working groups, and an effective combination of theory with practical work.

¹⁰ Beall (1996) p. 19.

Trainees were introduced both to national and international instruments and mechanisms for promoting and protecting women's rights.

Results:

Out of the total number of trainees, 21 women ran in the local elections and 9 were elected: 2 as heads of community and 7 as city councillors. A number of trainees made up part of the campaign team of their selected candidates or joined election committees. Overall, the local self-government elections witnessed a percentage increase in the number of women elected when compared with 2002: Women heads of community made up 2.08 percent compared to 1.39 percent in 2002, and 293 women as community council members compared to 156 in 2002. Overall, a significant increase has been registered in the total number of women running for the position of community council member: 451 in 2005 compared with 277 in 2002.

Acknowledgement to: Nune Harutyunyan, UNDP Armenia

In some countries participation in local politics is an important area for gaining political experience and skills for men and women alike. Thus, women should be encouraged to get involved in local politics as well as national politics.

*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 **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 to their constituencies, but are equally accountable to the 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.

Furthermore, the International Association of Local Authorities (IULA), for example, has set the goal of not more than 60 percent 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 that 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.¹¹ While this knowledge stems from women's experience, such designs are also likely to encourage men to take 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 men and women 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. 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 any person serving in public office.

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 as well. Other ideas include:

- ✓ **Delegation of responsibilities to gender-sensitive community-based organizations:** Cooperation with community-based organisations 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."¹²

- ✓ **Cooperation with local government associations:** The 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. Often-times these projects are sponsored by local governments in donor countries, yet the bilateral nature of these project relationships means 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:** Given that another common problem is the incompleteness of statistical data and analysis,¹³ the introduction of systematic data collection (by the local government associa-

¹¹ Ibid.

¹² Ibid., p. 11.

¹³ UNDP (2000), p. 3.

tion or other body) on gender balance and other gender mainstreaming issues at the local government level would greatly assist monitoring and evaluating progress.

- ✓ **Gender sensitivity training:** Trainings should also target men in an effort to inform them that women's votes are very important in local elections, especially given that women can be very appreciative and/or critical of local services in as much as they are the primary users of these services.
- ✓ **Implementation of accountability-enhancing mechanisms:** Increased attention to accountability can promote greater gender equality. These mechanisms can include:
 - Starting **budget initiatives** in which 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.
 - Holding **public hearings** on issues that are of major concern to the community and may affect men and women differently (e.g., new community development projects, new child-care schemes, etc.).

Link: see Gender Brief on Macroeconomics and Trade for more details

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
Percent 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
Women's council ¹⁴	Local	Ensure the integration of gender perspectives into policies and enable women to participate	Effectiveness of the council	Local government
Percent of local government expenditure targeted at gender mainstreaming and gender equality initiatives	Local	Financial commitment to attaining policy goals on gender equality		Local budget review

¹⁴ In some countries, e.g., Bosnia and Herzegovina, women's councils are a mandatory part of local governments. They are composed of civil society, gender experts, and local women leaders and professionals and are expected to represent women's interest and demands.

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 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 percent 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 on Macroeconomics and Trade, 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.¹⁵ Moreover, in many countries male children get a greater share of family resources, such as better food, health care, and education, thereby affecting the future of children in a manner that is not gender equal.

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 resources are being distributed equally among the intended beneficiaries. The 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 many countries men have the upper hand regarding decisions within the family, including the number of children. 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

¹⁵ Young (1992), p. 137.

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 on Health for a discussion on violence in intimate relationships

There are countless types of families and family decision-making models. While most are particularly “patriarchal” (where men wield most decision-making power), others are in fact the opposite. In very few 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 the home. In the region, we know that in some countries (Azerbaijan, Uzbekistan, Turkey, Tajikistan, Turkmenistan) in most of the families there is a domination of men in family decisions. The opposite trend is seen in single-parent families (which are increasing rapidly in Ukraine, Kyrgyzstan, Kazakhstan, Belarus, and Moldova), and this puts women under pressure and stress. In such cases they have authority and power of decision-making within the family but very little means of implementing it.

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.¹⁶ There is an on-going discussion around poverty measures and reduction programmes to take decision making power and intra household relations into consideration.

Link: See Gender Brief on Poverty

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 a safe, egalitarian, 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.

¹⁶ Ibid, p. 143.

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 cannot be put in place

Link: see Gender Brief on Macroeconomics and Trade for further details

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.
- ✓ **Gender attitude surveys:** Commissioning gender attitude surveys will provide data on how men and women differ in their attitudes as well as their expectations regarding gender roles (and idealized role models) in different facets of private and public life.
- ✓ **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.
- ✓ **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.
- ✓ **Property regimes at marriage:** Property regimes should enable women to have input regarding the use of any properties acquired within marriage even if the property is registered solely under the name of the husband.

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: <ul style="list-style-type: none"> housework parenting/ child-care 	National Household 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*
Percent of major decisions in households (with a male and female adult) that are taken jointly by both partners in regard to: <ul style="list-style-type: none"> family planning parenting household chores household budget sexual relations 	National Households	Extent of gender balance in different types of household and family decision-making	Because a survey will necessarily be based on subjective opinions of men and women, these data will reveal trends and perceptions more than hard facts.	Decision-making survey*
Male : female registered ownership of: house/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.

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.¹⁷

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, business owners, 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. On the other hand, most of the petty trade and some of the small manufacturing initiatives in the region are carried out by women. This indicates that women do not lack initiative but that they need the enhancement of skills. Given that employment in private business is more attractive because of higher income, it is very important to integrate women into the process.

This male-dominated system of governance can also become a “vicious circle”: Because private sector policies may not favour women, women are denied the opportunity to progress to top decision-making positions and, consequently, to shape more gender-equal corporate policies.

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, political influence is largely held in the hands of men. Again, this can lead to the development of policies that may exclude women.

Link: See Gender Brief on Private Sector Development

*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.

¹⁷ UNDP (2000).

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 about a more enhanced gender equality and social-justice perspective to this lobby.

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 viewpoints 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.

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 to gender equality.
- ✓ **Micro-finance initiatives:** Government-sponsored micro-finance initiatives targeted at women can sometimes give them a needed “head start” in becoming entrepreneurs and decision-makers in the private sector.
- ✓ **Organizing women in business:** Women’s caucuses in business associations or business women’s associations have been usually helpful in promoting gender equality within the private sector. For example, they have set norms on sexual harassment, and they have drawn attention to the need for promotion of women in business, including micro-credits and training for women.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Male : female ratio of 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 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
Women's caucuses in business associations	National	Women's interest in gender issues		Business association

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Human Rights and Justice

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Human Rights and Justice

This Gender Brief examines the linkages between gender mainstreaming and the international human rights framework, including the human rights-based approach (HRBA) to development programming. It also outlines how a gender perspective can be integrated into justice systems and human rights promotion and protection mechanisms.

I. Human Rights and the Human Rights-Based Approach to Development Programming

What is the Issue? What is the Goal?

The international human rights framework includes the following core treaties:

- International Convention on the Elimination of All Forms of Racial Discrimination (CERD)
- International Covenant on Economic, Social and Cultural Rights (CESCR)
- International Covenant on Civil and Political Rights (CCPR)
- Convention on the Elimination of all forms of Discrimination Against Women (CEDAW)
- Convention Against Torture and other Cruel, Inhuman or Degrading Treatment or Punishment (CAT)
- Convention on the Rights of the Child (CRC)
- International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families

Human rights add value to the agenda of development, as it includes both civil and political rights as well as economic, social, and cultural rights. They draw attention to accountability for the delivery of development benefits to all people. They also lend moral legitimacy and a sense of social justice to the objectives of human development. This perspective directs attention in setting development goals to the needs of the most deprived and excluded members of society, especially where deprivations are the result of discrimination. It also highlights the importance of access to information, political voice for all, and other civil and political rights as an integral part of the development process.¹ A core principle in the human rights framework is promoting the concept of human dignity for all people.

Still, the need for a specific mechanism for the promotion and protection of women's rights was recognized, and hence the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) came into force in 1978.

The strong linkages between the human rights framework and development work has encouraged the concept of a human rights-based approach to development programming (HRBA) to gain recognition within the UN system² and NGOs as well as in national policy-making. The approach utilizes the normative human rights framework encoded in international norms, standards, and principles as guidance for development work. The approach places emphasis on the capacity development of both **claim-holders**, who hold a legal entitlement to a right as well as **duty-bearers**, who have a specific obligation to take appropriate measures for the realization of the right.

¹ UNDP (2004) p. 5.

² UNDGO (2003).

HRBA and gender mainstreaming should be regarded as complementary approaches rather than contradictory or duplicating efforts. Many aspects are very similar in the two approaches, such as the focus on identification of vulnerable groups and the need for analysis based on disaggregated data. Likewise, there is a convergence of ultimate goals in that the universal human rights standards prohibit discrimination based on sex, and the goal of gender mainstreaming is to achieve gender equality.

BOX: The UN Common Understanding of how to apply a Human Rights Based Approach to Development Programming

1. All programmes of development cooperation, policies and technical assistance should further the realization of human rights as laid down in the Universal Declaration of Human Rights and other international human rights instruments.
2. Human rights standards contained in, and principles derived from, the Universal Declaration of Human Rights and other human rights instruments guide all development cooperation and programming in all sectors and in all phases of the programming process.
3. Development cooperation contributes to the development of the capacities of duty-bearers to meet their obligations and/or rights holders to claim their rights.

The UN Common Understanding is meant to guide the actual implementation of the human rights-based approach to development by **all UN entities**. It emphasizes the purpose of development cooperation, the use of human rights principles to guide development programming, and the methodology to be followed in development programming.³

*The **goal** of gender mainstreaming in the context of human rights is twofold:*

- A gender analysis provides insights into **causal factors underlying human rights violations** as the analysis relies on sociological concepts rather than normative acts.
- A gender analysis can assist in **identifying power relations** that define how men and women are able to exercise their human rights.

Why Bother?

Justice: The human right-based approach to development is based on the globally accepted normative framework of human rights. Any government that has ratified the international conventions can be held responsible for the realization and fulfillment of rights of their citizens, including women's rights.

Accountability and Credibility: By ratifying international conventions governments and administrations can be held accountable for the realization of rights of their citizens.

Efficiency: By using the main principles of a human rights based approach to development efforts are more likely to reach the most needed beneficiaries. In addition, the focus on both claim holders and duty bearers creates spin off effects where people themselves are empowered and have capacity to continue to claim their rights even after the implementation of a development initiative.

³ Ibid.

Possible Interventions and Entry Points

- ✓ **Capacity assessment of both duty bearers and claim holders:** This holistic assessment should ideally be carried out by a multi-disciplinary team including both human rights and gender practitioners and experts. Questions should be structured around the following two areas:
 - Which are duty bearers and what obligations are they supposed to meet according to ratified human rights treaties? Do they have the capacity to meet obligations (including responsibility, authority, data, and resources)?
 - Which are claim holders and do they have the capacity to claim their rights (including ability to access information, organize, advocate policy change, and obtain redress)?
- ✓ **Conduct a vulnerability assessment:** A vulnerability assessment provides a profile of the determinants of vulnerability, poverty or exclusion that men and women experience. Through sex-disaggregated data, it can identify whether these determinants differ between men and women. These assessments could be structured the following ways:
 - Quantitative research; Establish causal relationships of status information (i.e. women are more vulnerable to poverty because they face higher unemployment, lower education, discrimination etc.). The relationship is verified by analysing disaggregated quantitative data by sex, ethnicity, age etc.
 - Qualitative research; This approach gives information about perceptions and attitudes and is collected by semi-structured interviews, focus groups etc.
- ✓ **Work in multi-disciplinary teams:** The human rights framework emphasizes that all rights are inter-dependent and inter-related; the realization of one right often depends, wholly or in part, upon the realization of another. Therefore, to fully coordinate the application of a human rights based approach and gender mainstreaming it is useful to carry out this work in multi-disciplinary teams, to fully explore potential synergies.

II. 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 is 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 shown 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 laws (of which gender-based discrimination is one aspect);
- specific sex discrimination bills;
- equal opportunities acts—or, more specifically, equal opportunities employment acts;
- 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 whereby 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 does not afford full protection to a country's inhabitants, and is a barrier to gender equality.

CASE STUDY: Combating Trafficking in Women in Belarus

A joint UNDP/EU Project – Combating Trafficking in Women in the Republic of Belarus – implemented by the Ministry of Labour and Social Protection has undertaken a comprehensive review of national legislation and provided recommendations to amend laws related to trafficking. In addition, it has developed an electronic database of Belarusian and European organizations providing assistance to trafficked women and helped set up a hotline offering free information to persons travelling abroad for employment purposes (more than 7000 calls received) as well as a shelter for victims of trafficking (25 women). It has also produced an informative documentary about an 11-year-old Belarusian

girl who was trafficked that has been disseminated in more than 30 countries. One of the major challenges the Project attempted to tackle was to break down the “she is guilty” stereotype, as victims of trafficking are often treated as criminals. The project contributed to changing the perception of law-enforcement authorities on this issue through seminars and meetings and with the help of EU experts who shared best practices with their Belarus colleagues.

Acknowledgment to Alina Ostling, UNDP Belarus

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 need to be enshrined in national legislation in order to provide better guarantees of implementation.

CASE STUDY: Law Harmonization Process in Republika Srpska of Bosnia and Herzegovina

The Gender Centre of the Republika Srpska carries out the activities pertaining to harmonization of laws, other regulations, and general acts with the Law on Gender Equality of BiH. An example is the Law on Professional Rehabilitation, Qualification, and Employment of Persons with Disabilities in Republika Srpska that has been aligned with the Law on Gender Equality of Bosnia and Herzegovina. Harmonization with the gender equality law is specifically reflected in Article 4 on elimination of gender and sexual orientation-based discrimination and Articles 38 and 55 on equal representation in management and decision-making.

The Gender Centre is a part of the consultative processes on draft laws, other regulations, and general acts whereby governmental bodies submit copies of rough drafts or drafts to the Centre in order to obtain the opinion of its experts regarding harmonization of the proposed acts with the Law on Gender Equality of BiH. Entity Gender Centres and the Agency for Gender Equality of BiH are responsible for the monitoring and follow-up of the implementation of the Law on Gender Equality of BiH as well as for initiation and preparation of laws, regulations, and general acts leading to the attainment of gender equality and equity.

Acknowledgement to Klelija Balta and Armin Sirco, UNDP Bosnia and Herzegovina; Samra Filipovic Hadziabdic, Bosnia and Herzegovina Gender Agency; Spomenka Krunic, Gender Centre RS; Ana Vukovic, Gender Centre Bosnia and Herzegovina.

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, de facto inequality is a significant barrier to the full economic and social growth of a nation.

Link: see Gender briefs on Macroeconomics for further information

Quality of Life: Legal protection directly influences the ability of men and women to participate fully 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.”⁴

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 any laws exhibit direct discrimination on the basis of sex (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 areas that the 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.

⁴ UNDP (2000)

CASE STUDY: Advocacy for Gender-Sensitive Policies and Legal Reform in Albania

The Poverty Reduction Strategy Papers (PRSP)/ National Strategy for Social and Economic Development progress report in Albania, has incorporated a section on gender equality and included recommendations on gender mainstreaming for the first time. The UNDP project on Capacity Building for Gender Mainstreaming, provided support to the national gender equality machinery and the Gender Institute at Tirana University by twinning partnerships with European Universities with well-known experience in the area of gender studies. In addition, the project supported training of staff and policy analysis at line ministries and provided assistance to the organization of a comprehensive public awareness campaign.

Acknowledgment to Entela Lako, UNDP Albania

- ✓ **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.

Measuring Progress:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
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
If above-mentioned legislation exists, percent 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

III. 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 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 and Credibility: Equal access to employment opportunities and appointments to the judiciary is a question of justice in itself. Any barriers to the equal representation of men and women – regardless of whether they are systemic or the result of gender roles and stereotypes – need to be addressed as a justice imperative.

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 and justice, 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.

Possible Interventions and Entry Points

- ✓ **Capacity audit of the 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 that would indicate their willingness to undergo additional training. Note that specific methodology would need to be designed.
- ✓ **Support legal reform programmes to change discriminatory laws and regulations:** An effective and impartial legal framework is a good starting point in recognizing gender equality and women's rights. International treaties such as CEDAW and the International Covenant on Economic and Social Rights (ICECSR), etc. provide international standards on women's rights, which countries should be encouraged to sign, ratify, and implement. Accordingly, national legal frameworks should be revised so that women are ensured protection and their rights are guaranteed under national law.
- ✓ **Integrating gender into judicial training:** Judicial training on CEDAW, constitutional provisions on gender equality, 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 has shown that vague or inadequate constitutional guarantees can be enhanced by references to CEDAW.⁵ 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).

⁵ Landsberg-Lewis (1998) "Bringing Equality Home: Implementing the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW)" UNIFEM.

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 male or female 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	Whether men and women have been equally targeted and reached		Programme monitoring and evaluation records

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Science, Research, and Information and Communication Technologies

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Science, Research, and Information and Communication Technologies

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 mainstream gender into 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 both in the social and natural sciences.¹ 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.²
- 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.

Thus, the ultimate goal is to ensure the inclusion of gender as a scientific variable and 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 examination or investigation that exhibits a gender bias in setting the research question or in collecting and interpreting data is ultimately flawed.

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.

¹ See for example Keller and Longino (1995).

² Yoon (1995)

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 that recognizes and analyses the different needs and situations of men and women will undoubtedly lead to better lives for both women and men, as these interventions will be better targeted and thus more effective.

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 fellow members 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.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Percent 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 to 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
Percent of budget expenditure on state-funded projects that were: <ul style="list-style-type: none"> - explicitly focused on gender analysis - included appropriate consideration of gender 	National	Financial commitment to improving research and information base on gender-related issues	Quality of funded research	Review of research and budgets

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 of 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, which often results in the exclusion of women's production of goods for their families' consumption or for informal trade.³ 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; and
- **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 action or policy based upon such data is not an efficient use of resources, and may not bring benefits to the necessary target population.

³ Evans (1992)

Possible Interventions and Entry Points

- ✓ **Gender audit of national statistical office publications:** Data provided on a regular basis by the national statistical offices 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 in recruiting a suitable expert, or perhaps consult relevant expertise for the drafting.
- ✓ **Training:** Training workshops can be organized for selected individuals involved with statistics production and use for the purpose of enhancing skills for integrating a gender perspective into statistics collection and analysis.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Percent of statistics disaggregated by gender in annual national statistical bulletins	National	Efforts by national statistical offices to present statistics disaggregated according to gender	Gender disaggregation in <i>collection</i> of data	Desk review

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.

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 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. Research has pointed to the differential impact of ICTs on certain segments of the population.⁴ Hence, 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, leading to much lower retention rates of women as compared to men. Policy-making and other interventions must therefore be used to foster an ICT sector that is equally favourable to men and women.

Gender equality in the Information Society and Knowledge Economy: Surveys and research show sharp differences between men and women in terms of access and training in information and communication technology.⁵ For example, the eEurope+ 2003 benchmark survey reveal a very marked gender divide in the area of ICT-related education. The percentage of males and females in ICT-related tertiary-level education is 87 and 13 percent respectively.⁶

Women, therefore, must be a specific target group of many information society initiatives, with mainly two interrelated objectives: (i) equal opportunities, and (ii) counteracting the risk of social exclusion. In addition to general mainstreaming policies, ICTs are regarded as an opportunity to create quality jobs for women and, thus, to counteract the threat of social exclusion in the Knowledge Economy. E-services designed and deployed by public-sector organizations to meet special needs of women should be viewed as an important means of accomplishing equal opportunity and social inclusion objectives. E-Democracy that promotes participatory policies is strongly recommended to be on the priority agenda of any national and local E-Governance initiative.

*In sum, the **goals** pertaining to this sub-sector are:*

⁴ Marcelle (2000).

⁵ For example, the BEEP project financed by the European Commission, UNDP/UNIFEM (2004).

⁶ UNDP/UNIFEM (2004).

- provision of **equal opportunities** for men and women to acquire and use skills associated with ICT; and
- 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 for couples in negotiating this complicated division of tasks. The result might mean more gender equality in both reproductive work and the paid labour market.

Link: See brief on Labour for further information

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.

Possible Interventions and Entry Points

- ✓ **Gender impact assessment of ICT policies:** A review of policies 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 men or women due to cost of services, location, or 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 psychological barrier they present 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. Furthermore, training schemes with strong “out-reach” 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.

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 of men to 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 surveys

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. The 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 gender-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 1990s only 9 women had won the Nobel Peace Prize in science subjects, compared with over 300 men. Similarly, in 1993 the American National Academy of Sciences had 1,750 living members, only 70 of whom were female. Data in developing countries points to an even higher degree of exclusion of women.⁷

*The **goal** here is thus two-fold:*

- promoting **gender balance** within scientific and technological careers through policy-making and other interventions; and
- **valuing contributions** equally from men and women in this field.

Why Bother?

Justice: One important but often overlooked argument for bringing more women into the science and technology professions is the fact that science is often about women. The most obvious examples here are new reproductive technologies, including contraception and assisted pregnancy technologies. It is only ethical that women be involved in and 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 among those performing this study as well.

Credibility: More women in science and technology jobs mean better science. This is because a multiplicity of perspectives 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.

Link: See brief on Labour, Part IV: Occupational Segregation, for further information

⁷ Rathgeber (1995).

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.

Link: See brief on Education, for further information

- ✓ **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.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Ratio of men to 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 of male to 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

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Crisis Prevention and Recovery

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I. Crisis prevention and recovery

This gender brief examines gender mainstreaming in the context of crisis prevention and recovery (CPR). Adopting a gender approach in this area means recognizing how men and women are affected differently by natural disasters and armed conflict. Security Council Resolution 1325 (2000) also mandates UN member states to acknowledge the specific ways in which women both contribute to and sometimes detract from the achievement of national and community-level security. This sector brief also highlights the urgent need to address violent expressions of male identity and men's gender needs in policy interventions.

What is the Issue? What is the Goal?

Disasters and crises, whether natural or man-made, affect men and women very differently; yet if these gendered affects are discussed at all, they are usually done so in generalized terms that reinforces stereotypes of masculinity and femininity. Women are cast as a "vulnerable group," and they are put into this category with the majority of humanity, i.e., female, children, disabled, elderly, chronically ill, and traumatized people. Little space is left to recognize the great variety of women's active participation in disasters and conflicts. Their roles as combatants or their efforts to protect and restore their community and environment are often overlooked. In contrast, there remains a strongly held belief that "men" as a category are invulnerable, even though it is clear that post-traumatic stress makes many men vulnerable to a continued reliance on interpersonal violence or violence against the self in the form of suicide, alcoholism, and drug abuse. Such stereotypes result not only in the marginalization of men with special needs, but it reduces the options of men to protest militarization, and it hides their suffering and vulnerability from view.

Such over-generalizations prevent a deep analysis of why some people are more vulnerable than others when disaster strikes or conflict erupts. They ignore the underlying causes of conflict, and underestimate the extent to which human decision-making can exacerbate the impact of natural disasters. Most importantly, they fail to question why some members of beleaguered communities, especially men, choose to use violence to manage their pain and confusion in the aftermath.

There is, for example, evidence from the Balkans that shows men overcompensating for loss after a crisis by becoming more violent (i.e., reasserting their power) over women¹; and some men and women take advantage of a breakdown in law and order to perpetrate criminal acts against vulnerable members of society—for example, through human trafficking. Some men also misuse their power as protectors: There have been numerous accounts of sexualized violence perpetrated by UN peacekeepers in conflict zones. In Kosovo, for example, Amnesty International observed that:

NATO soldiers, UN police, and Western aid workers operated with near impunity in exploiting the victims of sex traffickers. As a result of the influx of thousands of NATO-led peacekeepers, 'Kosovo soon became a major destination country for women trafficked into forced prostitution. A small-scale local market for prostitution was transformed into a large-scale industry based on trafficking, predominantly run by criminal networks.'²

¹ Nikolic-Ristanovic (1999).

² Traynor (2004).

In the end, shallow analysis that relies on stereotypes inevitably compromises the responses of crisis prevention and recovery teams.

The goals of a gender-sensitive CPR response should therefore be to:

- **Challenge patriarchal gender ideologies** that represent women as passive victims while failing to recognize their capacities or to change the underlying structures that undermine their coping mechanisms.
- Respond to **men's vulnerability in crisis situations**, not just assume men are capable and heroic.
- Challenge the idea that all women will automatically promote the non-violent resolution of conflict (to increase women's participation as peace builders, we need to develop prevention/peace-building strategies that can also reach out to women).
- Include **women in all aspects of post-conflict and reconciliation** processes, as called for in Security Council Resolution 1325.

Gender issues in natural disasters

Disaster preparedness: Communities in disaster-prone areas have observed that gender differences are borne out in the way men and women take disaster preparedness actions, for example, prepare for seasonal floods. While men prepare the high ground and take animals to safety, women take care of securing and preparing appropriate food items and luggage required for survival during evacuation. While this division of labour often ensures survival, it perpetuates traditional gender roles and does not often allow men and women to switch responsibilities, which may be needed to protect their families from disaster.

Disaster aftermath: After disasters strike, the chaos, stress and family breakdown that are often produced exacerbate gender disparities, putting women and girls at higher risk.

Women's greater vulnerability to disasters

As observed in a number of Southeast Asian countries, women often receive warnings about impending disasters later than men do because of their more limited access to formal sources of information, or the limitations and social restrictions in mobility. Therefore they have less opportunity to move to safety. In the aftermath of a disaster, women are more at risk. After the Tsunami of 2004 instances of rape and sexual abuse of women were recorded during the rescue and emergency phases when women were housed in temporary shelters.

Gender-based expectations may also isolate boys and men in the aftermath of disasters. The formal aspects of psychological support bypass men, since they are expected to be strong and able to face the crisis without relying on help from others. Gender-based conditioning does not give men and boys space to develop the skills needed to carry out domestic chores and provide care to others. These facts are often overlooked in gender-blind disaster recovery interventions. The gaps in men's coping capacities in such circumstances can leave them behind in the recovery process.

Men have to change roles – widowers with young families

More women than men perished in the Tsunami of 2004, resulting in an unusually high number of widowers. Since family care giving has traditionally been the responsibility of the mother, men (widowers) have found themselves in an extremely difficult situation. Recovery agencies have not addressed sufficiently the issue of caring for young families without mothers. Months passed before they began to recognize the problem. To fill the gap, female members of the extended family have had to support the widowers' families, resulting in increased workloads for women.

Emergency management and recovery: Although women's status in society makes them more vulnerable to disasters than men, women are not just 'helpless victims', as they are often perceived and portrayed by recovery agencies. However, their role in risk- and emergency- management and recovery is substantial. Women need to be given the opportunity to apply their skills, whether in emergency camp management or recovery planning.

Failure to include gender concerns in disaster recovery efforts can work simultaneously to highlight and exacerbate women's vulnerabilities and ignore and downplay their skills, potential, and capacities. The result is deepened vulnerability and dependency, denied opportunities to learn and grow, to provide leadership, and to contribute to recovery efforts.³

Acknowledgment: Madhavi Malalgoda Ariyabandu, UNDP Sri Lanka.

Why Bother?

Justice and Credibility: When a natural disaster strikes, such as an earthquake or tsunami, women tend to be over-represented in the media as passive victims. Similarly, when violent conflict breaks out, media attention is often focused on women as primary sufferers. Both forms of representation are untrue: They hide the work women do to ensure their own survival, underplay the assistance women give to others, and disguise the fact that women are sometimes also responsible for perpetrating violence. Nor do such representations accurately reflect the experiences of men, who are not only heroic fighters, brave re-constructors, or stoical and dependable leaders, but are often the largest numbers of casualties when social order breaks down, especially when small arms are readily available.

While the intention of reporting women's victimhood may seem positive – to evoke sympathy and attract humanitarian assistance in crisis – using their images does not necessarily mean that women, who are often the most resource-poor and marginalized members of society, will actually receive appropriate support, including from the judicial system. One reason is that any aid delivery, even in refugee camps, relies on locally organized structures, and reaching out to women in patriarchal societies requires special efforts. But the reality is even more complicated, because images of women in crisis under-represent, or completely silence, the hidden dimension of women's suffering – the fact that they are often re-victimized by less visible sources (e.g., rape and sexual assault by people sent to respond to the crisis, heightened physical insecurity when law and order breaks down, or lack of access to aid as the least powerful members of families and economies).⁴ The refusal to focus on the particular problems men face in times of crisis also means that men are not getting the help they need to recover in the aftermath.

Efficiency: Gender mainstreaming may appear as just another burden and one that cannot be prioritized in the urgent work of crisis prevention and recovery. Yet a gender-aware response makes for greater efficiency in both the analysis of the crisis and in operational efforts to avoid or alleviate it. The post-crisis recovery agenda determines the direction of a country's development for years to come, and has often provided unprecedented opportunities to make far-reaching changes that are of benefit to women, for example, in constitutional or judicial reform. There is also a global com-

³ Nivaran (2006): Ariyabandu (2005). recommended reading

Global Sourcebook on gender issues in risk management for East West Center 2004-05, Ariyabandu (2003), http://online.northumbria.ac.uk/geography_research/gdn/; Gender equality in disasters -six practical rules for working with women and girls, January 2005

⁴ For discussions on the gendered impacts of disasters, see the Gender and Disaster Network <http://www.gdnonline.org/sourcebook/>.

mitment to gender equality as a development goal (as expressed in the Millennium Development Goals), and the post-crisis moment is an ideal opportunity to thoroughly implement that goal.

A gendered response challenges notions of “inevitability”: i.e., knowing that gender ideologies are produced by culture, and not innate, refutes the idea that rape and other sexual violence is an unavoidable by-product of armed conflict or natural crises. Gender analysis also refutes the notion that “Nature” can be blamed for disasters without recognizing the roles of men and women in reducing the impact of environmental crises or preventing them altogether. Gender analysis makes visible women’s work in increasing community security – for example, through resistance to weapons proliferation, or through preserving environmentally sound agricultural practices that reduce erosion and flooding. It allows more efficient violence-reduction strategies to be put in place — for example, by measuring the responses of different communities to reconciliation activities following armed conflict. Lastly, gender analysis allows planners to accurately see who is caught up in the crisis and to develop programming disaggregated by sex, age, and location that is responsive to people’s real needs.

Possible interventions and entry points

- ✓ **Increasing awareness of the way in which women and men are differently affected by disasters, armed conflict, and war:** Increasing awareness and generating debate on the different roles, capacities, and vulnerabilities of men and women can lead to a better understanding of how to support their coping mechanisms, ensuring that both women and men contribute to all security matters, whether in justice and security sector reform (JSSR) or in environmental protection to prevent disasters.
- ✓ **Integrating a gender perspective into research and preliminary assessments of reconstruction activities:** Needs assessments on security and prevention issues should be gender aware, and also take into account variables such as age, disability, location (rural or urban), class, ethnicity, and other issues that may increase or decrease vulnerability in times of war or natural disaster.
- ✓ **Ensuring more diversity in participation:** For maximum effectiveness, it is important that there be a diverse range of stakeholders, male and female, in all consultations and processes that determine needs and abilities and that decide upon recovery programmes and projects.

CASE STUDY: Women Leadership in Preventive Development Programme Initiatives

UNDP Preventive Development Programme in Kyrgyzstan aims to address threats to stability in Fergana Valley through enhancing community participation. The programme’s focus is on reducing conflict potential that may be triggered by cross-border tension with neighbouring countries, ethnicity-based politics, and the struggle for scarce resources through small-scale infrastructure rehabilitation and social welfare schemes at the community level. Women make up a large part of the membership of the community-based organizations that UNDP collaborates with. Two projects out of fifteen implemented under this programme are led by women.

Rabia Kazybekova is in charge of the “Construction of a Sunday School for Ethnic Minorities” project in Karasuu district. She is responsible for the social welfare sector. She has mobilized an addi-

tional 800,000 soms (approximately USD 20 500) from government funds for refurbishments and furniture for the Sunday school.

Hadicha Jumabaeva took the lead in constructing a secondary school for cross-border children in an isolated area of the Aravan district. At present, she is in charge of the social sector in Toomoyun municipality. She is involved in so-called target social assistance that aims to register and support vulnerable people.

The projects have also succeeded in conducting a survey and carrying out awareness-raising campaigns on gender aspects of conflict prevention such as production of videos, organization of seminars, trainings and focus group discussions.

Acknowledgement to Anastasia Divinskaya, UNDP Kyrgyzstan

Measuring Progress

INDICATOR	Level of Measurement	What does it measure?	What does it not measure?	Source of information?
Number of media images that valorize militarism and promote stereotypical, constraining gender roles	International, National	True reflections of women's contributions to promoting security; women's coping skills; greater willingness to discuss men's psychological trauma	To what extent donor funding is still mobilized through stereotyped images	Media: newspapers, radio, television, websites
Demobilization, disarmament, and reintegration programmes open to male and female combatants and to women associated with fighting forces in non-combat roles	National, Regional	Levels of interpersonal violence reduced; successful reintegration of returnees and ex-combatants	Very long-term impacts of reintegration: Do people successfully find non-violent economic alternatives?	Surveys, focus groups
Reduction in gender-based violence (GBV) in the aftermath, measured through gender-disaggregated police statistics on violence	National, Regional	Fewer incidences of GBV; Higher successful prosecutions for GBV; Measures to ensure that GBV is not "normal" in crisis situations	Changes in hearts and minds, particularly in male-dominated, hierarchical and violence-prone institutions	Legal records, surveys

II. Gender, Peace, and Security

What is the Issue? What is the Goal?

Just as men and women are affected differently by war and peace, they may have very different ideas about what makes them safe. Traditionally, peace and security were very narrowly defined as pertaining to national defense, an issue about which men are viewed as somehow more innately capable and knowledgeable than women. However, the new trend in security discourse—which focuses on “human security” and includes a variety of factors, including economic security; weapons control and management; demobilization, disarmament, and reintegration (DDR); and justice and security sector reform (JSSR)—can provide fruitful opportunities to think about new ways of understanding security, for example, through re-directing defense spending towards development, or connecting domestic violence and gun-control laws.

Armed conflict seems to shore up, in every possible way, gender stereotypes that claim men as aggressive, powerful actors while casting women as defenseless, passive victims. In recent years, however, gender-aware theorists on human security have been more careful about showing the complex range of identities that men and women assume in times of war.⁵ Their work shows that gender mainstreaming in conflict prevention and recovery requires more than a simple assertion that women are always and only victims and men always and only perpetrators of violence. Identifying *how* individuals are deliberately and consciously mobilized to support the process of militarization, in part through their gender identity, is crucial to understanding why people are prepared to accept and support war.

*In summary, the **goals** of gender mainstreaming in terms of conflict prevention and recovery should be:*

- to **understand** how male and female identity is **socially constructed** to support militarized ideologies; and
- to **better include women, and female perspectives**, into discussions on every aspect of crisis prevention and recovery.

Why Bother?

Justice and Credibility: A state that includes a commitment to non-discrimination in its constitution (or by being party to the Convention on the Elimination of All Forms of Discrimination Against Women [CEDAW] or other human rights conventions) damages its credibility if it does not demonstrate this principle by taking practical measures to include women in all aspects of security-related decision-making.

Efficiency: At present, we not only have a picture of war that is incomplete because it fails to examine the complex roles played by women, children, and non-combatant men in times of war, but, as in the case of Kosovo, where human trafficking has increased, we have seen all too many reconstruction and peace-building efforts—overwhelmingly male-authored and implemented—fail.

⁵ For examples, see Cukier (2002), 2002; Theme Four (2005).

Possible Interventions and Entry Points

- ✓ **Promotion of equal opportunities within security sector institutions:** Governments and policy makers can institute affirmative action policies and non-discrimination policies aimed at increasing the number of women employed in policing, the military, and governance bodies such as the Ministry of Defence and Parliamentary Security Committees. Private security companies must be regulated to prevent female partners from risk at the hands of legally armed men. All security sector personnel must be trained to recognize, prevent, and properly respond to gender-based violence, and policies on sexual harassment within security institutions must be actively enforced. Awareness-raising and training of top staff and officials will also be necessary to make such policies effective.
- ✓ **Increasing awareness on the way in which women are affected by conflict and war:** Increasing awareness and generating debate on men's and women's diverse roles can lead to a better understanding of these roles, and how men and women can make meaningful contributions to security sector institutions and derive equal benefits from reform initiatives such as disarmament, demobilization, and reintegration (DDR) and justice and security sector reform (JSSR). Some means of doing this are to increase the number of women trainers and teachers in security sector academies (e.g., police training colleges) and include trained women in DDR Commissions.
- ✓ **Disaggregating data by sex, and otherwise integrating a gender perspective into needs assessments and programming:** At present, very few countries sex disaggregate data on the impact of small arms or try to systematically examine the ways in which war and conflict affect men and women differently. A paucity of data on gender differences means that programmes to alleviate the effects of war and violence may not necessarily reach the right beneficiaries: e.g., there are very few systematic efforts to reduce the mortality and morbidity rates of young men in weapons-prolific societies, even though they constitute the vast majority of victims.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
The introduction of gender-disaggregated statistics to measure rates of crime against females in public and private spaces	National Regional	Concrete evidence that women's security has improved, e.g., reductions in levels of gender-based violence, increased freedom of movement, more girls enrolled in schools	The sustainability of the increase in women's security, especially when weapons remain prolific	Survey/criminal records
Male : female ratio in leadership and decision-making positions in military and defence institutions, including in particular civilian oversight bodies	National	Gender balance in military and defence governance	To what extent a gender perspective is integrated in policy and practice; to what extent women are granted decision-making powers and have the capacity to challenge traditional views of what constitutes security	Survey

III. Gender Roles in Violent Conflict and War

What is the Issue? What is the Goal?

Security Council Resolution 1325 came about from a belief that enhancing a gender perspective in governance and security structures overall might help avert conflict, because understanding gender impacts can re-define the boundaries of what constitutes “security.” If armed conflict does erupt, gender mainstreaming is essential to ensure that the different needs of men and boys, women and girls are met when reconstruction and development programmes are put in place.

“...the fragmented view which considers different types of violence—child abuse, domestic violence, rape, torture, war—separately...disguises the enormity which might be visible if we viewed all forms of violence together.”⁶

However, in order to adopt a gender perspective, it is necessary to have a better understanding of the roles that men and women play during times of violent conflict. Stereotypes about men’s and women’s roles influence programming decisions. This might result in reconstruction efforts that overlook the diverse roles that men and women assume in armed conflict, and might even risk undermining their coping mechanisms.

Although war is typically considered to be the domain of men, women have always been involved in violent conflicts in any of a number of ways:

- women and girls as combatants or in other ways associated with armed groups, including in armed opposition or “terrorist” groups
- women as mothers and wives of combatants
- women as part of civilian communities targeted during conflict
- women as victims of rape and other war crimes
- women as perpetrators of war crimes
- women as breadwinners and heads of households
- women as care-givers for children, the elderly, and the wounded and disabled
- women as social and political organizers for peace

Similarly, men’s roles are very diverse:

- men and boys as combatants, including in armed opposition or “terrorist” groups
- men as victims of abuse and violence
- men as husbands, fathers, and breadwinners separated from their families
- men as conscientious objectors to war or deserters
- men as social and political organizers
- men as (psychologically and/or physically) wounded and disabled

Observing the effects of violent conflict often re-confirms deeply held beliefs about what constitutes “innate” (if extreme) forms of masculine and feminine behaviour. However, it is crucial to understand not only how women and concepts of femininity, and how men and concepts of masculinity, are shaped to support war, but also how they are affected by conflict and war. While some men and women see war as an opportunity to escape harsh living conditions, advance their fortunes, achieve revenge, or experience

⁶ Horsman, (1999).

“excitement,” some men and women do not choose to participate in armed violence at all. Increasingly, however, people (even very young children) are forced into fighting either by law or other means. In some countries, where war or instability has lasted many years, new generations are raised under extreme and often violent conditions, with the result that their identities are strongly influenced by militarized constructions of masculinity and femininity. Post-conflict reconstruction and development programmes have to be highly nuanced to be able to address the very different needs and experiences of the wide range of adults and children of both sexes who are now both victims and perpetrators of violence.

While conflict and war may entrench gender roles and stereotypes, they may also, paradoxically, allow individuals to challenge gender-role stereotypes and take on new roles. This may offer an unprecedented opportunity for female emancipation in the aftermath of war, provided post-conflict interventions are designed to take full advantage of the breakdown of exclusionary social, cultural, and economic structures.

Gender-based violence: Special mention needs to be made of male violence against women in armed conflict. Because women are often perceived as “keepers of the culture,” they are extremely vulnerable to sexual violence during conflict, where rape and forced pregnancy can be employed as weapons of war and genocide.

“The recent wars in Bosnia-Herzegovina, Rwanda, and Kosovo point to the fact that sexual violence can be a crucial element of terror, especially in campaigns that involve ethnic fratricide or nationalist wars. According to testimonies received from most of the conflict areas, rape and sexual violence are used to punish populations for acts that are seen as supportive of the other side. In addition, rape and sexual violence have been used to assert dominance over one’s enemy. Since women’s sexuality is seen as being under the protection of men in the community, its defilement is an act of domination over the males of the group that is under attack.”⁷

It is absolutely crucial that:

- Military institutions recognize that the formal or informal sanction of rape and sexual assault is a war crime, and that those who order, condone, or engage in such practices must be punished for their crime.
- Women are offered adequate protection during conflict from such crimes, and that they be provided with services and rehabilitation should they be subjected to such crimes. Men, too, can be victims of sexual assault and rape during war and conflict, and should be afforded the same protection and rehabilitation services, and perpetrators should be punished for these crimes.
- It is recognized as illegal to recruit anyone, male or female, under the age of 18 into an armed force or group. The recruitment and use of children under 15 is a war crime.⁸

Why Bother?

Justice: Systematic rape was finally recognized in 1998 by the International Criminal Tribunals for Rwanda and former Yugoslavia as “a war crime, a crime against humanity, and an element of genocide.”⁹ Recognizing both men and women as victims of rape and other forms of sexual assault in the name of “warfare” is an issue of justice. More work still needs to be done to consider the legal

⁷ Coomaraswamy (2003).

⁸ This consensus is expressed in a comprehensive set of international legal instruments, such as the Optional Protocol to the Convention on the Rights of the Child (CRC) and the Rome Statute establishing the International Criminal Court. It is reinforced by a series of Security Council resolutions.

⁹ Coomaraswamy (2003).

implications of widespread abduction and coercion into joining fighting forces, but victims of this crime are in need of specific forms of protection and reparations.

Quality of Life: It is no secret that quality of life in general is severely compromised during violent conflict for both men and women. However, failing to recognize the diverse roles that men and women play in these conflicts can actually worsen their quality of life and further undermine their coping mechanisms.

Promotion of non-militarized leadership: Recognizing the diverse roles that 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 result in de-militarization and profoundly alter social attitudes towards the use of violence to achieve political ends.

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 a 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 country (internally displaced people - IDPs). Asylum seekers and IDPs need immediate relief and aid. (The 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 if the needs of all affected people are to be met. One question in this regard is the 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 (which should include cultural awareness 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.

- ✓ **HIV and AIDS and other reproductive health interventions:** HIV and AIDS challenges human rights and gender relations, exacerbates socio-economic crises, and undermines 'human security.' Resolution 1308 recognized that the HIV and AIDS pandemic is "exacerbated by conditions of violence and instability..." The very characteristics that define a complex emergency, such as conflict, social instability, poverty, and powerlessness, are those that favour the spread of HIV and other sexually transmitted infections. DDR and other security-sector reform programmes are often initiated in high HIV and AIDS prevalence areas or high-risk environments; and ex-combatants are considered a high-risk group. Careful attention has to be paid to the gendered aspects of HIV and AIDS and other reproductive health issues if appropriate interventions are to be designed.

Measuring Progress

The chaos of conflict and war means that little attention can be paid to measuring its effects while it is in progress. However, certain interventions, such as relief and aid, can be monitored for their gendered impacts:

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Number of women entering DDR or SSR processes	National (possibly regional)	Women's entry into security sector institutions; women as beneficiaries of DDR	The numbers of women who are still too intimidated or unaware of their right to participate	Gender-disaggregated data surveys
Existence of female-specific services, such as reproductive health services, in camps and shelters	n/a	Attention to needs of women during conflict	Effect on women who still choose not to participate, out of fear or ignorance	Survey of aid and assistance provision

IV. Conflict Resolution, Peacebuilding, and Post-Conflict Situations

What is the Issue? What is the Goal?

As Security Council Resolution 1325 makes clear, during the period of conflict resolution and peace negotiations, and following the cessation of active conflict, governments and societies must consider gender dimensions as they undertake the task of negotiating the terms of peace and rebuilding their social structure.

BOX: Security Council Resolution 1325

"[Expresses] concern that civilians, particularly women and children, account for the vast majority of those adversely affected by armed conflict, including as refugees and internally displaced persons, and increasingly are targeted by combatants and armed elements, and recognizing the consequent impact this has on durable peace and reconciliation;
[Reaffirms] the important role of women in the prevention and resolution of conflicts and in peace-building, and stressing the importance of their equal participation and full involvement in all efforts for the maintenance and promotion of peace and security, and the need to increase their role in decision-making with regard to conflict prevention and resolution;
[and Reaffirms] also the need to implement fully international humanitarian and human rights law that protects the rights of women and girls during and after conflicts."¹⁰

Negotiating peace: Women have in many instances exhibited great courage in intervening in conflicts as peacemakers, and have often been very effective at doing so. However, women remain under-represented as senior conflict mediators in formal peace negotiations. To better understand women's exclusion as negotiators, we need not to focus on women but to analyze the respect we have for the social, cultural, and economic power wielded by older men in the global order. We need to ask why there is a consistent tendency to keep the men most responsible for the violence of war in the most authoritative positions when the time comes to make peace. The contributions made by women who actively engage with peace-building and conflict resolution must be acknowledged and encouraged at a leadership level, not just from the grassroots.

Women do bring different issues to the table: different visions of how to share power; important gender-related issues, such as gender-based violence; a focus on households headed by sole females, which war so often leaves behind; and issues at the heart of achieving durable peace and stability, such as the promotion of human rights, education, social service provisions, and security issues (e.g., disarmament and reintegration). The inclusion of these issues can only serve to cement the chance for a lasting peace, concerned as they are with strengthening society and countering marginalization.¹¹

Return to the old or heralding the new? The social upheaval caused by conflict may catalyze the emergence of new gender roles. For example, the two World Wars in the first half of the twentieth

¹⁰ See the full text of the resolution on: <http://www.peacewomen.org/un/sc/1325.html>.

¹¹ White (2005). Also see "Hard Lessons Learned: Gender Notes for Tsunami Responders." <http://www.radixonline.org/resources/hard-lessons-gendernote1.doc>.

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 men and women can equally benefit from peace.

Reintegration of ex-combatants: If women have been involved in battle, it is likely that they have experienced a greater degree of equality with men, and it may be more difficult for them to return to communities where traditional gender roles still dominate.¹² At the same time, the fact that women have participated actively as armed combatants should be used to promote their greater participation in reconstructed military and civilian security services.

The gendered needs of receiving communities, who must accept returning combatants, must also be addressed to ensure that reintegration goes smoothly and is sustainable. Once men return, women may need assistance to retain the cultural, economic, and social influence they exercised during the war, while men are likely to need specific assistance to help them overcome psycho-social effects that may lead to increased interpersonal violence in the family.

*The **goals** here are to:*

- promote and ensure a “**gendered peace**” in peace-building processes; and
- **recognize** the **gender needs** of the communities in which ex-combatants are reintegrated, and of the ex-combatants themselves.

CASE STUDY: Kosovo Protection Corps (KPC)- Mainstreaming UN Resolution 1325

Gender mainstreaming within the KPC: Increasing the number of women working in the agency and supporting them to reach higher positions in the organization.

In its daily work, the Kosovo Protection Corps (KPC), a civilian agency that provides emergency response and reconstruction services, often faces problems related to gender, such as domestic violence and trafficking in women. Referring to Resolution 1325, the KPC Board on Gender Equality has the responsibility to oversee gender mainstreaming within the work of the Corps and to provide gender training to KPC members. The UN Development Fund for Women (UNIFEM) is supporting the Board in institutionalizing and strengthening its work, specifically focusing on providing the Board and high-level officers with training workshops on gender equality and gender mainstreaming, and with the production of training materials.

In the long run the work will result in changed gender structures and, thus, a more democratic society by improving of the status of women and working to reduce domestic violence and trafficking in women.

Acknowledgement to: Ms. Flora Macula, UNIFEM Kosovo

¹² For case studies, see Farr,(2005); Douglas, Farr,. and Hill (2004).

Why Bother?

Credibility: A peace that does not equally recognize the needs and rights of men and women is not a “gendered peace” – it is neither truly democratic nor credible, and may ultimately prove unsustainable. Those responsible for negotiating peace and running a transitional government must be accountable to all members of society, recognizing the needs and potential of men and women in the reconstruction and development phases.

Quality of Life: Equal attention to the needs of men and women in post-conflict rehabilitation will ensure that all members of society can rebuild their lives in the most effective, efficient, and non-violent manner.

Chain Reaction: The terms of the peace negotiations will largely set the parameters of reconstruction. It is thus crucial that gender needs and the rights of men and women are taken into consideration, and that women’s greater participation in governance and security structures is effectively promoted.

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. Rape is a crime against humanity. It is 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 positions of authority in the peace negotiation process. Furthermore, as called for in SCR 1325, the situation of women should be addressed in all peace negotiations, and gender equality must form the basis of all reconstruction and development processes. 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. Working with youth is particularly important in this regard, and should explicitly encourage gender equality.

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What does it not measure?	Source of information
Ratio of men to women “around the table” in leadership positions at formal peace talks and negotiations	National	Gender balance in governance structures building peace	How well gender needs will be addressed in reconstruction and development	Survey
Male : female ratio in bodies charged with implementing peace, e.g., National Commission for DDR	National	Gender balance in governance structures building peace	How well gender needs will be addressed in reconstruction and development	Survey
Gender budgeting: percent of donor funding going to women-led civil society peace initiatives and other projects for women	National	Re-directed spending so that marginal members of society benefit; reduction in military spending		Audit of donor support
Male : female ratio of both implementers and beneficiaries of peace education projects	National	Whether women and girls and men and boys are equally included as beneficiaries of peace education programmes	Attention to gender dimension within these programmes	Monitoring and evaluation records of programmes

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HIV and AIDS

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HIV and AIDS

The many dimensions of HIV and AIDS are reflected in socio-economic, cultural, health, human rights, and policy issues. Thus, it is necessary to go beyond issues of health alone in order to ensure the effectiveness of policy interventions and projects addressing HIV/AIDS. Multidisciplinary responses from sectors such as justice, education, defence, immigration, industry, and transport are all required. Given the different societal, economic, and power relations that define men and women, and given the differences in their access to information and services as well as in their ability to make decisions regarding one's own health and sexual behaviour, men and women have a different set of HIV vulnerabilities. By addressing these distinct vulnerabilities, gender mainstreaming ensures for increased effectiveness of HIV and AIDS policies and programmes while also reducing gender inequalities.

In 2005 there were an estimated 2.3 million HIV and AIDS cases in Eastern Europe and Central Asian countries. This number reflects a twenty-fold increase in less than 10 years. In 2005 there were twice the number of officially registered AIDS deaths compared to 2003, and a nearly 30 percent increase in the number of women living with HIV, although the total number of new HIV infections in men, women, and children combined remained the same.¹ Current data for the region shows four inter-related groups shaping the HIV epidemics: 1) young, mostly male, injecting drug users (IDUs); 2) women infected through heterosexual contact (feminization of the epidemics); 3) infants infected through maternal to newborn transmission; and 4) men who have sex with men (MSM).

To contain and reverse this epidemic it is necessary to provide young people with choices and hope for a productive and economically secure future; and to assist women, particularly the rural poor, to receive the information, tools, and skills necessary for leading a productive life and earning a living wage as an alternative to entering the sex trade or to being trafficked. It is also necessary to reduce the stigma and discrimination against people living with HIV and AIDS (PWHA) or MSM and ensure the recognition of and respect for their rights. These are essential human development responses to tackle the HIV epidemic. Countries where democratic governance is growing (Poland, Czech Republic, and Slovakia²) and where multi-sectoral approaches are being applied in response to HIV (Kyrgyzstan) have shown promising efforts to contain the epidemics.

What is the Issue? What is the Goal?

- **Young, mostly male IDUs:** Except in the Balkans, male IDUs play a major role in driving the epidemics in Eastern and Central Europe, the Baltic States, and Central Asian Republics. However, the number of female IDUs is increasing in the region. UNAIDS has estimated that from 1 to 3 percent of the adult population in Russia, Ukraine, Estonia, Latvia, and Kyrgyzstan are IDUs. In Albania, 65 percent of IDUs are between 20 and 30 years of age.³ IDUs frequently share injecting paraphernalia, have multiple sexual partners, seldom use condoms, and have a high prevalence of Hepatitis B or C. Society has traditionally tolerated men's alcohol and drug consumption but placed moral and cultural restrictions on women for such consumption. This lower social acceptance of drug abuse by women restricts their access to drugs, resulting in statistically greater use by males than females.⁴

¹ UNAIDS (2005/12) p 45.

² UNDP Press Release, 17th February 2004p 2.

³ Republic of Albania, Ministry of Health (2003).

⁴ Hsu (1993).

As a gender expression of lower status, women tend to be the last users when drug-filled syringes are passed around. This tendency, combined with the biological fact that women have smaller veins and inject more slowly than men, increases the probability of women being infected.⁵ Furthermore, some studies have found that among IDUs, up to 73 percent of females, compared with 30-40 percent of men, re-use needles for drug injection.⁶

The low condom use among male IDUs is reflected in the increasing number of female non-drug use partners getting HIV infection through sexual transmission.⁷ Also, women tend to sell sex in order to obtain drugs whereas men tend to commit crime to support their drug habits⁸

HIV prevalence is high in the region's prisons and detention centres. For example, in 2002, up to 15% of Lithuanian prisoners were HIV infected, many related to drug use.⁹ Upon release, infected prisoners may spread HIV to their sexual partners and other drug users and are thus considered one of the bridge populations for spreading HIV to the general population.

- **Feminization of the epidemic:** HIV data on women is scarce and often of poor quality. In most countries HIV data collection focuses on high-risk groups. Data on women is often limited to female sex-workers and does not cover the general female population. Despite the scarcity of quality data, the pattern in a growing number of countries points to an increasing feminization of the epidemic through heterosexual transmission, overtaking that through injecting drug use. Today, heterosexual transmission of HIV accounts for 50 percent in Armenia,¹⁰ 65 percent in Belarus,¹¹ and 90 percent in Albania.¹² In Russia, more than half of female juvenile detainees have sexually transmitted infections (STIs).¹³ The feminization of HIV further aggravates the demographic crisis in a number of countries such as the Russian Federation. It is not only economic dependency ratios that are affected, but fertility rates are further reduced, thus accelerating the population decline.
- **Maternal to newborn transmission:** The increasing feminisation of the HIV epidemic has resulted in an increase in maternal-to-newborn transmission. In 2003 an estimated 13,000 children were born to HIV-positive mothers in the Russian Federation and 2,200 in Ukraine.¹⁴ The graphs below illustrate the increase in mother-to-child transmissions regionally in Western, Central, and Eastern Europe and specifically in Ukraine. It is a common perception that HIV-positive women alone are to be blamed for newborn HIV infections despite the likelihood of fathers infecting the mothers before the pregnancies occurred. In many countries treatment was provided to mothers to protect the newborn, but not for the mother per se. For example, in Belarus, 88 percent of HIV-positive mothers receive one complete course of anti-retroviral treatment to prevent vertical transmission. Unfortunately, mothers do not receive continued anti-retroviral treatment (ART) in spite of the detrimental consequences of discontinuing the drugs post-partum. However, considerable efforts have been made in recent years to correct this situation, and some countries now continue ART for HIV-positive women after delivery.

⁵ UNDCP (1998).

⁶ UNAIDS, AIDS epidemiologic update, December 2005, p 46.

⁷ Ibid, p45.

⁸ Hsu (1994).

⁹ UNAIDS. April 2004., p 34.

¹⁰ Data from Armenia National AIDS Centre, (2005).

¹¹ Report on monitoring the follow-up to the Declaration of Commitment on HIV/AIDS, Jan-Dec 2002, National AIDS Centre, Minsk, Belarus, 2003.

¹² Data from the Institute of Public Health, Ministry of Health, Albania, 2004.

¹³ Federal Service of the Russian Federation in Consumer Rights Protection and Human Welfare, 2005.

¹⁴ Ibid.

- **Stigma and discrimination:** Studies in the Balkans and Russia have revealed wide-spread discrimination, disregard of privacy and confidentiality, and refusal to provide treatment regarding HIV-positive people, including HIV-positive mothers and their children.¹⁵ Against this background mothers often choose not to ascertain their HIV status or to seek help in order to protect themselves and their children. This practice results in under-reporting of HIV among women. In addition, providers often delay testing and diagnosing HIV in women as they stereotype women's symptoms to be more psychosomatic in origin than those of men. Ethnic minority populations may have distinct cultures and languages and often lack legal status and, thus, access to education, employment, health, and other social services. Consequently, existing social welfare and health services and preventive educational materials tend to fail in considering gender relations of specific ethnic groups or the lower literacy of women compared to that of men.
- **Men who have sex with men (MSM):** There is little information on HIV status among MSM due to silence, denial, social taboo, and the fact that they form very closed groups. For Czech Republic, Hungary, Slovenia, and Slovak Republic, MSM remains the main mode of transmission.¹⁶ In Albania, 25 percent of all HIV-positive individuals are MSM. Many are bi-sexual, have low condom use, and engage in sex work as migrants in other countries, returning home after being infected.¹⁷ In addition to IDUs, MSM are another bridge population for the spread of HIV to men or women in the general population.
- **Sex versus gender:** Gender issues go beyond a simple dichotomy of men and women. Bio-physiological differences result in twice the risk of HIV transmission from male to female than from female to male.¹⁸ Societal assigned gender roles, however, further fuel HIV vulnerabilities. For example, Albanian traditions favour the male child, which leads to reduced educational opportunities for girls. This gender bias results in women having less competitive or employable skills, thus increasing the possibility of being trafficked or entering into the sex trade.

CASE STUDY: Women's Leadership in Promoting Greater Involvement of PWHAs

Stigma and discrimination against PWHAs (persons living with HIV/AIDS) among health care professionals have been one of the major obstacles in the Balkans for access to treatment and care services. Foundation Partnerships in Health (FPH), a woman-led regional NGO, has been promoting greater health-care for PWHAs by strengthening partnerships between infectious diseases specialists in hospitals, clinics, NGOs, and ministries of health in the five Balkan countries and in the UN Mission in Kosovo. FPH organized the first regional HIV and AIDS conference in October 2005 in Skopje, Macedonia, and featured a PWA woman as the key-note speaker. In addition, both male and female PWHAs from countries in the region were invited to participate in the conference.

As a result of this initiative, PWHAs are developing a regional network among themselves to advocate their right of access to treatment. One PWA was a woman dentist who was infected during her work. She is now collaborating with her Ministry of Health to develop guidelines for dentist workplace safety and HIV prevention. FPH also engaged PWHAs as resource people in national clinical training of primary-care doctors and nurses in Bosnia and Herzegovina, Macedonia, Mon-

¹⁵ From "The primary health care provider: HIV and AIDS knowledge training needs assessment in Bosnia and Herzegovina, Macedonia, and the UN administered territory of Kosovo." Unpublished 2005 country study results.

¹⁶ Ibid, 9.

¹⁷ Ibid, 12.

¹⁸ Health Services Research Centre. September (1995).

tenegro, and Albania. This training was the first time most primary health-care providers in these countries ever met and had an open discussion with PWHAs about stigma and discriminations and the special needs of male and female PWHAs in treatment, care, and support. Feedback from these trained primary health-care providers and post-training evaluations showed increased sensitivity of these providers and improved willingness to deal with PWHAs. In addition, the FPH efforts have encouraged the governments in the region to solicit inputs from PWHAs in their programme planning and policy formulation.

- **Population movement:** Countries in the region are undergoing rapid socio-economic and political transition. With many public enterprises downsizing or closing, more women than men lose employment. Being economically more insecure than men, there are increasing numbers of women entering into the sex trade or becoming mobile in search of employment. Sex work increases women's risk of HIV infection and mobility increases their HIV vulnerabilities as there is more sexual exploitation of women when they travel. Wives of seasonally migrant male workers who engage sex workers are at particular risk of HIV infection, yet there has been no HIV preventive education programme aimed at these women, who have not been categorized as a high-risk group. It is necessary to involve the transport and private sectors to reach these populations.
- **Violence during conflict or peacekeeping:** A 27-country report of Central and Eastern Europe recommended legal regulation of violence and its enforcement to reduce human rights violations by police, media, clients of sex workers and health care services.¹⁹ During wars and ethnic conflicts, women are frequently raped. Even at refugee camps, women are more vulnerable than men to rape. Peacekeeping forces, mostly composed of men who have disposable income and are often away from home for extended periods of time, frequently associate with local women and men for transactional sex. These behaviours increase the risk of HIV transmission.

*The **goal** of mainstreaming gender concerns in HIV and AIDS policies and programmes is twofold:*

- to reduce HIV vulnerability and the burden of AIDS care and support by **eliminating gender inequality and discrimination** in HIV and AIDS and development policies and programmes;
- to empower men and women to take effective action to build their own resilience by creating an **enabling policy and programme environment**.

This means increasing social capital in order to build community resilience;²⁰ in other words, ensuring the balanced participation of men and women to improve the ability of individuals, families, communities, and nations to attain the sixth Millennium Development Goal (MDG) of halving the number of AIDS-infected persons by 2015 through and with improved gender equality. This has important implications for monitoring and evaluation indicators.

Why Bother?

Justice: Gender inequality increases the HIV vulnerability of women, which is itself an injustice that needs to be redressed. It is often less understood that men, when they exploit unequal gender relations, put themselves at a higher risk of HIV infection in their apparent show of power or control

¹⁹ International Harm Reduction Network. December (2005).

²⁰ Hsu, du Guerny and Marco (2002).

over women through multiple sexual partners or by not practicing safer sexual behavior. Conversely, equality between men and women facilitates the negotiation of safer sex and reduces the need for transactional sex.

Quality of life: There is a higher degree of stigma attached to women, who are either HIV-positive or living with family members who are HIV-positive. This results in barriers to health-care services, loss of employment, and decreased eligibility for marriage. Such discrimination affects the quality of life of these women and also that of their children, who suffer directly and indirectly from their mother's stigma. Gender mainstreaming in HIV policies and programmes must address stigma and discrimination, particularly those related to gender, thus improving the quality of life of HIV-infected women.

Chain Reaction: It is important to re-emphasize that both gender and HIV and AIDS are cross-sectoral issues, and that changes in either one can affect many other sectors. Mainstreaming gender into HIV and AIDS policies and programmes is a powerful tool for human development by ensuring the recognition and respect of human rights in other areas. This would require advocating partnerships between engendered HIV and AIDS policies and programmes and those in other sectors. For example, by involving the father, the chance of survival of an HIV-infected mother and their child can increase. The child's chance of going to and staying in school is also increased. Otherwise, the child may be locked into an inter-generational downward spiral.

Possible Interventions and Entry Points

✓ **Review and analysis of HIV and AIDS planning, policies, and programmes:** A review and analysis of existing plans, policies, and programmes would assist in determining the differential impact such plans, policies, and programmes have on gender-based HIV vulnerabilities faced by men, women, girls, or boys. One can also assess the degree of gender mainstreaming, the gaps, the obstacles, and the possible strategies required to ensure gender equitable HIV and AIDS responses. Capacity-building of technical, financial, and human resources and knowledge-base would be necessary to ensure the availability of gender mainstreaming competence in HIV/AIDS planning, policy, and programmes.

The stages in gender mainstreaming often include a specific focus on women and girls, or men. The next stage is to deal with the roles and interactions between males and females in specific cultural, social, and economic contexts. A further stage then deals with the barriers and obstacles to gender-equitable HIV and AIDS prevention, treatment, care, and support through interventions for gender transformation of selected priority or critical gender elements of a society. Without such change the situation may not improve. Gender transformation relevant to HIV and AIDS policies and programmes often would require HIV and AIDS mainstreaming in development planning, policies, programmes, and sectors. It should be clear that some of the processes take time, but given that HIV and AIDS will be with us for many years, a long-term perspective on gender issues is necessary.

A checklist for a gender analytic review would include:

- How does the specific gender role in this country or cultural group contribute to the HIV epidemic?
- How does the development plan or legislation facilitate or hinder gender influences in HIV and AIDS relevant policies and programmes—e.g., on stigma, language used for preventive education, etc.?

- Does the particular HIV and AIDS policy or programme perpetuate gender inequality or facilitate gender equality?
- What intervention could improve male participation and contribution to HIV prevention, care, and support (e.g., role of father, spouse, brother, employer, provider)?

CASE STUDY: HIV Programmes Addressing Gender Concerns

Needle and syringe exchange programme in Osh, Kyrgyzstan: UNDP Kyrgyzstan is supporting a national, comprehensive, multi-sectoral HIV prevention and AIDS care and support programme. It covers a strengthened legal framework, rights protection, and the engagement of multiple sectors, including justice, defense, the uniformed services, social welfare, and education in addition to the health sector. In this context, an enabling legal environment allows community outreach for needle and syringe exchange that is attached to the district hospital. The outreach workers were recruited from both young male and female ex-drug users. The programme has ensured not only outreach to both male and female drug users, but also a focus on the specific issues of each group. For example, when a female outreach worker encounters a male drug user, there may be male-specific issues that she is not in a position to discuss because of the cultural context relating to assigned gender roles. She could then refer her male outreach team member, and vice versa.

Prison outreach in Bishkek, Kyrgyzstan: The authorization of harm-reduction activities run by an NGO aimed at fostering self-help among drug users has been extended to penal facilities in collaboration with prison authorities. With the availability of both male and female outreach counselors for prison inmates, it has become possible to reach both male and female inmates and to deal with drug use, sexual behaviour, and gender related issues.

The gender-balanced approach of the UNDP programme facilitated outreach to a wider drug-use and prison population as well as allowed a more effective harm-reduction effort. The number of new HIV infections for both men and women in Osh and in the intervention prisons has stabilized following the introduction of these interventions. In addition, there are more referrals for drug rehabilitations and for discharged inmates to enter therapeutic communities.

- ✓ **Universal access:** Interventions in line with UNAIDS' strategy of scaling-up universal access²¹ to comprehensive services range from prevention and treatment to care and support. Gender inequality is one of the obstacles in achieving universal access. Starting in 2006, country-driven efforts have been initiated to develop action plans for universal access. For each indicator used to monitor universal access, it is suggested that gender implications be analyzed as part of the consultation process. Where the programmes and policies do not reflect considerations for relevant gender implications identified in the analysis of the indicators, partners involved in these consultations should be encouraged to advocate actions to ensure that gender equality is considered in the proposed country roadmaps. It is important to have active participation by gender focal points knowledgeable on HIV mainstreaming in each country's consultation process to ensure that the indicators and associated plans and actions reflect gender equality for the eventual achievement of the sixth MDG. A gender-sensitive approach to universal access would facilitate improved gender equality, thus also facilitating the achievement of other MDGs.

²¹ UNAIDS is facilitating a multi-partner effort driven by the countries themselves, to move closer to universal access. The process aims to identify solutions to the key obstacles that are blocking universal access to prevention, treatment, care, and support services, and to develop nationally agreed, targeted plans or 'roadmaps' for building significantly more comprehensive AIDS programmes by 2010.

- ✓ **Prevention:** Equal access of men and women to services related to prevention, including voluntary counseling and testing (VCT), must be ensured, taking into account the potential barriers. This would require training of counselors who are sensitized to the ethnic differentials in gender related concerns, and monitoring policies and programmes to reduce barriers to women. It would also require the backing of social welfare services to provide alternative support for women, particularly livelihood support for PWHAs. The availability of male and female counselors can improve access by males or females to VCT services. Development sectors and the judiciary are critical to reducing HIV vulnerabilities, including the prevention of human trafficking.

Studies comparing IDUs where harm-reduction programmes (needle and syringe exchange, substitution therapy, and condom use) have been implemented to those without the programmes showed a clear reduction of risk behaviour.²² In Ukraine, for example, 67 percent of IDU sex-workers are HIV-positive as compared with 17 percent of sex-workers who are non-IDUs.²³ HIV prevention programmes within prisons and in uniformed services are essential to ensure protection for both the service personnel and local populations.

Many sex education efforts are conducted through reproductive health programmes, which are mostly used by women. Consequently, men can be less aware and knowledgeable about HIV issues. However, when education efforts attempt to correct such imbalances, they often deal with HIV or AIDS for men and women as separate issues. It is necessary to consider societal-assigned gender roles and their implications when addressing barriers to access for men and women in terms of prevention, treatment, and support services. In this regard, preventive education materials need to take into account the diverse gender relations and their implications for men and women, especially in different socio-cultural groups.

Teaching gender transformation through equality at an early age in school and families can prepare boys and girls to evolve in gender roles and behaviours, not only at the individual level but also at the family, community, and national levels.

- ✓ **Treatment:** To break the vertical transmission of HIV as well as mitigate the consequences, the potential mother and father should both be involved in treatment, rather than only the HIV-positive pregnant woman. Improved survival of both parents enhances the survival and healthy growth and development of the children. Moreover, it is important to ensure equal access to treatment and drugs for males and females regardless of their ethnic origin and economic status.
- ✓ **Care and support:** A major effort in the area of care and support is required because these traditional gender roles are almost exclusively assigned to women. Care and support for HIV and AIDS-affected individuals are resource intensive, time consuming, and emotionally draining. Women cannot provide the requisite care and support without affecting their work, family relations, schooling, etc. AIDS programmes often automatically assume that women will take on the role of supporter and care-giver. It is crucial for gender equality, effectiveness, and justice to involve men equally in these tasks. This requires developing gender equitable strategies of care and support, training, and a systemic approach that would involve employers, the education system, and the health-care and labour sectors.

Gender mainstreaming into HIV and AIDS programmes could reorient care and support programmes in which the burden currently falls predominately on women. Involving men in sharing

²² Eroshina et al. (2005).

²³ Rhodes et al (2004); Rhodes et al (2004a).

the burden of care, if properly done, improves quality of care and support. For example, involving the mining sector by establishing family camps instead of single male camps would improve quality of life and reduce HIV vulnerabilities.

✓ **Filling key gaps:** To address male involvement in the many aspects of HIV and AIDS already discussed, several key gaps must be filled. Acknowledging the diverse socio-economic and demographic conditions across the Europe and CIS region, interventions need to be tailored to country-specific conditions. However, some policy and programme gaps in the regional context are as follows:

- **Quality data and information access:** The data collection by HIV and AIDS programmes should be reviewed in order to ensure that gender dimensions and interventions are better captured and reflected. For example, data should be collected on paternal participation in programmes on mother to child transmission; and on levels of care, disaggregated by sex and age. It is important to monitor the involvement of girls and boys as well as sex differences in care provided to the elderly. Good quality surveillance data provides the information to form the basis for effective responses to HIV/AIDS.²⁴ It is necessary to conduct well-designed and highly focused surveys, to invest in monitoring, and to generate evidence as the basis to guide gender-sensitive policy and programmes in prevention, treatment, care, and support. Behavioural surveillance and universal access to voluntary and confidential counseling and testing that reach out beyond “high-risk” groups are essential to catch early warning signals and prepare responses to contain the changing HIV epidemic.²⁵ This means ensuring access to and participation of ethnic minority groups, house wives, rural communities (particularly women from rural areas), and mobile populations (both male and female) of all types. Data by sex, age, income, education level, etc., which is important for policies and programmes, often is not available.²⁶ Thus, it needs to be collected to facilitate the monitoring of gender implications for programmes and for universal access.
- **Leadership:** One of the key efforts needed in the region is to build partnerships among the public and private sectors, NGOs, MSM, PWHA groups, migrant communities, ethnic minority groups, research communities, and international organizations both at the country and regional levels. International organizations could facilitate the promotion of greater involvement of men and women who live with HIV, working with the male and female leadership of ethnic minority groups and migrant populations.
- **Enabling policy environment:** Promoting democratic good governance that facilitates access to information and upholds the rights of men and women is fundamental to human development. There is a need to develop a legal framework and policies that provide an enabling environment for universal access to prevention, treatment, care, and support for men and women. Examples include drug policies that balance suppression with harm reduction; provision of preventive information and health commodities and access to treatment for prison inmates; reduction of legal barriers for PWHA, MSM, and sex-workers; facilitation of the formation of self-help support groups; reduction of social exclusion; and the enforcement of programmes to reduce stigma and discrimination by health-care providers.

²⁴ Ibid, 2.

²⁵ Hsu et al. (2004).

²⁶ Hsu and du Guerny (1996).

Measuring Progress

INDICATOR	Level of measurement	What does it measure?	What it does not measure?	Source of information
Number of HIV and AIDS infected by sex and age, monitored over time.	National Sub-national	Increase in infected people by group and sex.	Ways of transmission	HIV surveillance; VCT clinic data; Hospital data
Male-to-female ratio of programme staff at decision-making and other levels	Programme & organization	Level of input by men and women	Extent to which gender issues influence decisions	Human resource files
Number of women v. men using VCT services	National Local District	Access to prevention services	Quality of service	VCT service data
Number of HIV-infected among wives of male migrants	Cross-country National Local	Out-reach to risk groups		survey
HIV rate among male vs. female sex-workers	National Local	Ability to negotiate safe sexual behaviours	Availability of preventive education, commodities	Survey
Rate of HIV by age, sex, and school drop-out status	National Local	Proxy of girls vulnerability	Reasons for drop out.	School statistics; HIV statistics
Male : female ratio of VCT counselors and HIV service providers	National Local	Choices for male and female clients on gender-sensitive issues relevant to HIV	Actual service quality by male or female provider to male vs. female clients	Clinic service data
Proportion of ethnic minority group accessing prevention, VCT and treatment by sex	National Local	Policy and programme uptake in different groups	Reasons for high/low outreach	Health centre, hospital, and VCT statistics

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