



GENDER CAMPUS

THE GLOBAL DEVELOPMENT AGENDA:
TOOLS FOR GENDER SENSITIVE
PLANNING AND IMPLEMENTATION

TRAINING MODULE

CORE CONTENT

Introduction to Gender Analysis and Gender-sensitive Indicators

UNIFEM is the women's fund at the United Nations. It provides financial and technical assistance to innovative programmes and strategies to foster women's empowerment and gender equality. Using a rights-based approach, UNIFEM focuses on strengthening women's economic security and rights; combating violence and HIV and AIDS among women and girls; promoting gender equality in governance in both conflict and non-conflict situations. It is the executing agency for the EC/UN Partnership at the country level.

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Training Module: Introduction to Gender Analysis and Gender-sensitive Indicators

Gender Campus

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OVERVIEW

This module provides some essential tools for mainstreaming gender equality in development cooperation.

Unit A offers an overview of gender analysis as a systematic attempt to identify key issues contributing to gender inequalities so that they can be properly addressed. Gender analysis provides the basis for gender mainstreaming, and is also needed to determine whether specific measures are needed for women or men in addition to mainstreaming activities. Gender analysis should be conducted at all levels, from the grassroots (the micro level) through intermediate levels (meso level) such as service delivery systems, to the highest political levels (macro level), and across all sectors and programmes of development cooperation.

Unit B introduces participants to the basic concepts relating to gender-sensitive indicators, which are needed to measure progress towards targets which themselves need to be gender-sensitive. A prerequisite for conducting sound gender analysis, as well as for the establishment of gender-sensitive indicators, is the availability of statistical data disaggregated by sex and other more qualitative types of information reflecting differences between women and men.

PRE-REQUISITES

Participants need to be familiar with basic concepts and approaches relating to the role of gender equality in development, and with the definition of gender mainstreaming as a strategy.

OBJECTIVES

This module aims to review the key tools for mainstreaming gender equality in the context of development.

In this module participants will:

- ✓ Explore the importance of, and key elements for, conducting gender analysis in the development context.
- ✓ Appraise the use of gender-sensitive indicators at different levels.

UNIT A. WHAT IS GENDER ANALYSIS?

1. What is a gender analysis? Elements to consider

Gender analysis is a systematic attempt to identify key issues contributing to gender inequalities so that they can be properly addressed. Gender analysis provides the basis for gender mainstreaming and is described as ‘the study of differences in the conditions, needs, participation rates, access to resources and development, control of assets, decision-making powers, etc., between women and men in their assigned gender roles’.¹ Gender analysis is also needed to determine whether specific measures are needed for women or men in addition to mainstreaming activities.

Gender analysis should be conducted at all levels, from the grassroots (the micro level) through intermediate levels (meso level) such as service delivery systems, to the highest political levels (macro level), and across all sectors and programmes of development cooperation.

Gender analysis must be based on an examination of statistics disaggregated by sex and of more qualitative information about the situation of men and women.

An analysis of gender issues must also recognise other issues which impact on all members of society, such as age, ethnicity and socioeconomic conditions. Neither women nor men form a homogeneous group.

Among other analyses, such as environmental impact assessments, conducting a gender analysis is a prerequisite for examining policy alternatives appropriate to addressing a particular development issue, and for formulating projects and programmes. For example, a gender analysis of the linkages between poverty and gender issues in a given country may be necessary for the development of the country’s development strategy, or for the joint drafting of strategies by the country and its donors. Gender analysis also informs and operates as a basis for gender budgeting.

2. Why a gender analysis is important

A gender analysis is important because gender inequalities need to be identified before they can be addressed through either mainstreaming procedures or specific measures directed to women or to men.

Policies and legislation can be analysed in terms of gender outcomes or potential differential impacts on men and women.

A gender analysis is important when it is focused on institutions so as to determine how the nature of their service delivery affects women and men, or how institutions themselves are also ‘gendered’ in terms of recruitment practices, division of labour and decision-making.

A gender analysis provides information on the different roles of women and men at different levels; their respective access to and control over the material and non-material benefits of society; their priorities, needs and responsibilities.

Needs analysis is a necessary step when identifying appropriate strategies for the promotion of gender equality. Women’s **practical needs** are usually derived from existing gender roles within their society – primarily as mothers and homemakers – and address inappropriate living and working conditions in terms of food, shelter, health and employment. Their **strategic needs**, on the other hand, refer more broadly to their subordinate position in society and to longer-term necessities for eliminating the inequalities that also generate their practical needs. For example, making it easier for a woman to find a job may meet her practical need for income; however, if there is no associated change in the gender division of labour, the burden of domestic work will still

¹ European Communities, 1998, *One Hundred Words for Equality: A glossary of terms on equality between women and men*.

hinder her ability to engage in paid employment. Therefore, when designing policies and programmes it is important to consider immediate practical needs and to address existing inequalities in the specific context, within a longer-term strategic perspective, with a view to tackling the root causes of such inequalities.

A gender analysis needs also to show the linkages between inequalities at different societal levels; for example a good gender analysis will show how a legal system of inheritance which stipulates that women inherit nothing or a lesser amount from their parents puts women at a disadvantage in terms of economic opportunities throughout their lives.

A thorough gender analysis should reflect the ways in which all other cross-cutting issues (age, environment, ethnicity, rights) also impact on women and men. For example, older women from minority ethnic groups are more disadvantaged than younger, educated women of higher socioeconomic status. The former may feel more solidarity with men of their own status than with the more privileged women.

On the basis of a thorough gender analysis it will be possible to understand current gender inequalities in a given situation or sector and to propose a range of measures for inclusion in the project or programme to address and redress the situation.

3. Sources of data for a gender analysis

Gender analysis usually involves examining existing data on the concerned population prior to deciding what additional information is needed and how to obtain it. A wide range of sources should be consulted, including reports and studies from government institutions, NGOs, donors and academic sources. Additional data can be obtained by studies and surveys, or by using rapid appraisal and focus group techniques.

4. A range of gender analysis frameworks

There are a number of different gender analysis frameworks which can be used to organise the data obtained through gender analysis. Most of them necessitate collecting information differentiated by gender. Having such data is extremely important because it helps to assess the impact of a planned action on women separately from its impact on men.

Each framework or methodology outlined below can be useful, but also has limitations. Each prioritises different aspects of gender analysis. Frameworks are necessarily simplistic as they must focus on only some of the large number of factors and issues which affect a given situation, so perhaps no single framework should be used exclusively, but rather elements of several should be used depending on the situation. Some frameworks, such as the Harvard Analytical Framework, focus on social roles (i.e. the gendered division of labour and the gendered distribution of resources); other frameworks, such as the Social Relations Approach, focus on social relations (i.e. how individuals relate to each other, what relative power and bargaining power they have, etc.). Other frameworks try to combine these two dimensions of analysis.

Some frameworks also examine the structures of development agencies or the private sector and their service delivery in terms of the impact on women and men. The latter require an analysis of rules and regulations in organisations which affect access for women and men, or of the ways in which legislation at national level impacts in different ways on women and men.²

² See Candida March, Ines Smyth, and Maitrayee Mukhopadhyay, *A Guide to Gender-Analysis Frameworks* (Oxfam, 1999) for a detailed review of the different frameworks available.

Overview of the Various Gender Analysis Frameworks

Harvard Gender Roles Framework: one of the first frameworks for gender analysis, it is based on an efficiency approach, an economic case for allocating resources to women as well as men. It mainly examines women's and men's activity profiles, the differences in access and control over resources. It focuses on the roles of women and men, rather than on transformatory measures to achieve gender equality.

(Origin: 1985 Overholt, Anderson, Austin and Cloud with USAID)

Gender planning emphasising practical and strategic needs: this framework aims to set up gender planning as a form of planning in its own right. It is based on ideas of gender equity and women's empowerment and examines women's productive, reproductive and community management roles in society. It identifies disparities in practical and strategic gender needs. It helps categorise policy responses, although not all policy responses fit neatly into these categories and some policies may contain elements of different categories.

(Origin: Early 1980s, Moser, Development Planning Unit, UK)

Gender Analysis Framework used in ILO: in a combination of the two frameworks above, this framework focuses on practical and strategic gender needs to investigate the division of labour between women and men, access to and control over resources and benefits, opportunities for achieving equality, and the capacity of ILO and its partner organisations to implement gender equality issues.

(Origin: ILO Bureau for Gender Equality)

Gender Analysis Matrix: this framework is influenced by participatory planning and community based approaches. It is based on participatory transformation of relations and analyses development at four levels of society (women, men, household, community), and four types of impact (labour, time, resources, socio-cultural factors). It is limited in its application.

(Origin: 1993, Parker with Middle Eastern. Save the Children and NGO groups)

Socio-economic and gender analysis: this framework can be used in support of people-centred development. It considers the socio-economic and gender issues in order to support participatory planning and determine the measures required at the macro, intermediate and field levels and the linkages between them. It combines stakeholder analysis, analyses of resources and constraints, institutional analysis, and gender-sensitive participatory appraisal tools at field level. The SEAGA programme is a comprehensive approach, but requires capacity-building for those wishing to implement it.

(Origin: 1995 FAO)

Social Relations Approach: the background to this framework is the idea of enabling women to be agents of their own development by focusing on social relations and institutional analysis. It examines the structures of intermediaries and their service delivery in terms of gender; inequalities in distribution of resources, responsibilities and power; people's relationships to resources; and activities through institutions. By using this approach the reasons for gender inequalities become more evident, and the focus is on women's relationships to men, the State, and institutions.

(Origin: 1994 Kabeer Institute of Development Studies, Sussex, UK)

Adapted from: ITC/ILO, 2006, *Module on Gender Mainstreaming: Approaches and Methodologies*. Gender Campus, Turin.

5. Some key elements of a gender analysis at different levels

Examining issues in terms of where they are placed (macro, meso and micro levels), is useful in determining the level or levels at which such issues should be addressed. It can help determine which elements are within the control of the individual or development

institution in terms of effecting change, as well as those elements beyond the control of those carrying out the analyses.

Macro level

The Macro level relates to the national policy governing activities in the country. This includes legislation and regulations. The analysis focus on how these national policies influence activities in an institution or organisation or at field level. Other issues to think about are national agricultural policies, demographic trends, terms of trade, national educational policy, unemployment figures and trends, and public sector spending. International influences on laws and policies can also be examined.

Guiding questions may be:

- ✓ Have gender equality commitments have been made by the government in the context of international processes such as the Beijing process, the MDG process, or the ratification of CEDAW?
- ✓ Do national and sectoral policies reflect these commitments through an awareness of inequalities between men and women at different levels and inclusion of means of addressing them?
- ✓ How do current policies, laws and regulations (voting rights, rights to inheritance and credit opportunities, rights to divorce and child custody) impact differently on women and men?
- ✓ In national-level institutions (parliament, government ministries, universities, businesses), how are decisions made? How are women represented in the system? How are decisions taken?

Meso (intermediate) level

At the meso level the focus is on institutions, (NGOs, development organisations), how they operate in terms of service provision and implementation, and how they influence national policy. This is where most of us work. At this level, focus is on health and education services, the role of the public and private sectors, levels of decentralisation, institutional structures, and levels of expertise in institutions.

Guiding questions may be:

- ✓ Do service delivery structures (e.g. all civil service structures at this level - health, education, labour, transport, police, judiciary, etc.) reflect gender balance in their membership and management? Do women and men have equal access to employment and services? Is equal treatment in terms of pay and benefit guaranteed for men and women?
- ✓ Do private-sector businesses and institutions (including companies, banks, media, etc.) reflect gender balance in their membership and management? Do men and women have equal access to employment and services?
- ✓ Is there occupational segregation in the labour market by gender, either horizontal or vertical?

Micro level

At the micro level the focus is on women and men clients. The analysis should focus on how to identify their specific needs and priorities relating to their context, and examine the extent to which gender roles, relationships and cultural issues are key.

Guiding questions may be:

- ✓ What is the division of labour between women, men, young and old? Who normally does what? Have there been changes due to war, labour migration, or the HIV/AIDS epidemic?

- ✓ Are there gender inequalities in access to resources, in who has control over different resources (including new resources) and benefits from institutions, or in development projects (or any outside interventions from the government)? Resources include non-material resources such as time, knowledge and information, and rights.
- ✓ What factors influence access to and control over resources (for example age, sex, position in an organisation, wealth, rural *versus* urban location, education level, networks and patronage)?
- ✓ At the community level, how are decisions made about different resources and activities?
- ✓ At the household level, who makes decisions about different resources and activities?



Example of linkages between the macro, meso and micro levels: access to financial services in a given context

Micro

Both women and men have different credit needs for income generation and other expansion schemes. Women control money for small household items, but men control income for larger items. Women tend not to know about their rights in applying for loans. It is considered 'crude' or 'not feminine' if women ask for credit. Men generally own land and other fixed capital. One needs to be able to read and write to fill the loan forms, and there tend to be more illiterate women than men. Women have low self-esteem and view men in lending institutions and also in NGOs as 'big and important'. The financial language is confusing. Sometimes other people in society scorn those who take an enterprise initiative. Disadvantaged groups generally need very small loans.

Meso

The structure of the formal credit system is very hierarchical and does not appear user-friendly. The minimum loan amount is large as it costs the lending institution the same amount of time to process large and small loans. It is mainly men that are employed in the formal credit system and it is not considered appropriate for women to deal with banks. Informal sources of credit are through money lenders, and they deal with male heads of households. Some NGOs are involved in extending loans, but they can only offer loans to groups of women, not to individuals. Information about credit systems is circulated through the newspaper and word of mouth. Loans require the signature of a male head of household. It is not considered 'normal' to offer loans to women. Small-scale women entrepreneurs are not considered to be "serious".

Macro

Owing to State control lending institutions do not have the authority to lend to those who do not have fixed capital, such as women farmers. The legal code of the country does not make provision for women to own land and sometimes they are legally considered "minors". As a result the lending institutions cannot legally lend to women. Policy on credit and lending is channelled through complicated formal circulars and in the financial pages of the national newspaper. Even though the government wants to promote entrepreneurship, it seems to be too complicated to offer loans through institutions. The policy of international NGOs working in the country is to offer group loans – and the groups must be of 14 people. There is no flexibility for smaller groups.

Source: ITC/ILO, 2006, *Module on Gender Mainstreaming: Approaches and Methodologies*. Gender Campus, Turin.

6. General terms of reference for conducting a gender analysis

Below is a model of Terms of Reference (TOR) for those who need to commission a gender analysis for programming or implementation. The elements suggested can form part of general TOR for conducting gender analysis exclusively, or can help complement the tasks of, for example, a broader socio-economic study.

The exact content of the TOR for a gender analysis will vary depending on the sector, the scope of the project or programme and the assignment in question.

Background to the assignment

A clear description of why a gender analysis is required should be elaborated and should include reference to previous studies that highlighted gender inequalities in the sector, or other inputs that generated gender-related questions requiring answers. Thus the background to the gender analysis assignment should make reference to national reports on gender issues, sector-relevant supporting data, monitoring reports, evaluations, and so on. It is important that the background information indicates clearly the kind of inputs required for the subsequent design (or redesign) of the aid delivery method, or what inputs from the gender analysis report are required in terms of policy and procedural guidelines.

Study objectives

This section will be very specific. Active verbs should be used to describe objectives. What exactly will be studied under the gender analysis should be very clearly stated, including target groups, scope, and so forth.

Methodology

Ideally, a gender analysis should be conducted using participatory methods and collection of qualitative information as well as quantitative data disaggregated by sex. The TOR should broadly specify the research methods to be used.

The TOR should also specify whether the person or team conducting the analysis will be working with other gender experts (e.g. national/international gender experts) or with sector specialists.

Expertise required

For gender-sensitive participatory approaches, being able to communicate in the local language is important.

Other relevant qualification and experience required often include:

- a post-graduate degree in social sciences or another relevant field (e.g. labour economics);
- training in the field of gender and development – a good indication of whether or not the consultant has the relevant expertise;
- normally 5–10 years' experience of conducting gender studies;
- publications or field reports on gender issues that credit the consultant;
- ability to work in a team – this is essential for gender analysis work, as the consultant will have to liaise with many different groups at different levels, including perhaps policy-makers, managers, field workers, technical experts and others;
- the ability to communicate non-verbally and to decipher hidden meanings in responses is important. Good observation techniques are advantageous.

Reporting requirements

Electronic reports may also be complemented with visual images from the results of participatory rural appraisal exercises, or photographs that visually illustrate gender equality issues.

Workplan and timetable

Gender cuts across many sectors and activities. Conducting a gender analysis means that the team have to familiarise themselves with all aspects of the Sector Programme or all project activities. Macro level policies will have to be analysed, institutional service delivery mechanisms analysed in terms of gender sensitivity, and field-level realities studied and presented in a format that will inform the project. Often the time allocated for a gender analysis study is too short. Depending on whether the analysis is conducted by a team or by a single person, it is both time- and cost-effective to allocate time prior to arrival at the project location in order to review all gender-relevant project documents and research policies.



KEY POINTS

- ✓ Timely gender analysis is important because it informs either mainstreaming procedures or specific measures directed to women or to men.
- ✓ A gender analysis provides information on the different roles of women and men at different levels (macro-meso-micro); their respective access to and control over the material and non-material benefits of society; their priorities, needs and responsibilities.
- ✓ A gender analysis also helps determine how institutions and their practices affect women and men in different ways.
- ✓ Ideally, a gender analysis should be conducted using participatory methods and obtaining qualitative information as well as quantitative data disaggregated by sex.

UNIT B. GENDER-SENSITIVE INDICATORS

1. Indicators and gender-sensitive indicators

An indicator is a pointer. It can be a measurement, a number, a fact, an opinion or a perception that directs attention to a specific condition or situation. It measures changes in that condition or situation over time. In other words, indicators provide a close look at the results of initiatives and actions. The difference between an indicator and a statistic is that using indicators should involve comparison with a norm. For example, a statistic would be "50 per cent of women are literate", whereas an indicator would be "50 per cent of women and 70 per cent of men are literate".

Gender-sensitive indicators have the special function of pointing out how far and in what ways development programs and projects have met their gender objectives and achieved results related to gender equity. Gender-sensitive indicators measure gender-related changes in society over time.³

Gender-sensitive indicators are useful because they uncover gender-related inequalities. Mainstream indicators such as GNP have been used in a way that obscures or undervalues women's contribution to society. A good example of this is the way in which, in many societies, areas of work customarily reserved for women, such as child-rearing and housework, are not included as work in national accounting systems.

Gender-sensitive indicators are important because they can measure changes in gender equality – a definition of a gender-sensitive indicator is an indicator which measures gender-related changes in society over time.

2. Where gender-sensitive indicators are needed

Gender-sensitive indicators are needed in order to measure progress towards targets which themselves need to be gender-sensitive. A prerequisite for the establishment of gender-sensitive indicators is the availability of statistical data disaggregated by sex and other more qualitative types of information reflecting differences between women and men.

Indicators for the Millennium Development Goal 3

Governments, donors and other development organisations have committed themselves to ensuring that development indicators are gender-sensitive within the framework of the Millennium Development Goals (MDGs).

The core indicators drawn from the MDGs can be used as a reference for analysis in the country and donor development strategies. Performance towards Goal 3, 'Promote gender equality and empower women', requires the following indicators at national level:

- 3.1 Ratios of girls to boys in primary, secondary and tertiary education
- 3.2 Share of women in wage employment in the non-agricultural sector
- 3.3 Proportion of seats held by women in national parliament

Indicators provide a measurable means of monitoring and evaluating a measure's goal, objectives, outputs and activities. If, for example, in a direct support project, both women and men beneficiaries are involved in defining the indicators for the project, the project will more likely be able to measure whether both women's and men's real needs are addressed. In most cases indicators are defined by those responsible for monitoring and evaluating an initiative, sometimes with some input from a gender

³ CIDA, 1997, *The Why and How of Gender-Sensitive Indicators: A Project Level Handbook*. Minister of Public Works and Government Services Canada, Aug 1997.

specialist. Data collected during the needs assessment stage is also useful for developing gender-sensitive indicators.⁴

While gender-blind indicators typically attempt to measure variables such as 'group participation', and 'involvement of the community', gender-sensitive indicators highlight changes in gender relations in society over time and by location, that is to say measuring whether gender equality is being achieved. For instance gender responsive indicators measure women's invisible or unremunerated work such as childcare, household and community work. In a *Logical Framework*, indicators and sources of verification need to be gender-sensitive in order to ensure that gender is mainstreamed throughout the corresponding project or programme and can be accounted for during monitoring and evaluation.⁵

3. Quantitative and qualitative gender-sensitive indicators

Gender-sensitive indicators can be quantitative or qualitative.

Quantitative indicators, as the term suggests, are measures of quantity (total numbers, percentages etc.). They are needed for indicating the average outcome, or the degree to which a goal or objective has been attained.

Sources of quantitative indicators are data systems and records where information is presented in a sex-disaggregated manner. Typically these sources include censuses, labour-force surveys, administrative records, or sociological surveys of the target population. Quantitative indicators tend to be easier to define, record and assess than qualitative indicators.

Qualitative indicators can be defined as people's judgments and perceptions of a given subject. They are useful for understanding processes, but frequently do not show how typical or widespread the views expressed are. Qualitative indicators are harder to measure as they involve processes and use categories of classification such as those based on perceptions. For instance, qualitative indicators may indicate changes in attitudes and behaviour; growth in knowledge and skills, self-reliance, confidence, independence or self-esteem; and progress in building contacts, networks, or mechanisms for social support. Typical sources of qualitative indicators are public hearings, focus groups, attitude surveys and interviews, participatory appraisals, participant observation, sociological and anthropological fieldwork.



Examples of qualitative/quantitative indicators

Quantitative indicator:

To measure the numbers of new jobs created for women and men respectively in the small enterprise sector as a result of a government focus on this sector.

Qualitative indicator:

To measure the level of men's and women's confidence in and approval of revised legislation pertaining to family law.

Qualitative/Quantitative indicator:

To measure the (changing) proportion of women and men who perceive local government management as very participatory over a certain period of time. A scoring or ranking system, such as a scale of 1–5, would have to be prepared in advance to grade perceptions of local government management capacity.

⁴ ITC/ILO, 2006, *Module on Gender Mainstreaming: Planning and Evaluation*. Gender Campus, Turin.

⁵ Id.

4. Gender-sensitive indicators at different levels

It is important to be clear about the types of indicator required at different levels.

Macro level

Typically indicators are used to measure the following gender equality issues at the macro level:

- ✓ changes in legislation/policy frameworks affecting gender equality;
- ✓ changes in national/sector budget allocations in favour of gender equality issues;
- ✓ changes in institutional focus on women's/gender issues, for example by creating or strengthening new national women's machinery;
- ✓ changes in political participation by women and men at different levels, as reflected in voting patterns or numbers of women parliamentarians;
- ✓ rates of employment/unemployment (female and male) in different sectors and at different levels;
- ✓ access to productive assets (land, credit, vocational training);
- ✓ access to basic services (education, health, water) by women/men, girls/boys;
- ✓ trends affecting gender roles and relations such as economic reform, migration of men to urban areas, introduction of new employment opportunities through trade liberalisation, new technology, etc.

Meso level

At meso level indicators may be used to measure the following issues:

- ✓ changes in quantity/quality of gender-competent staff in partner government, NGOs, the EC and other donors;
- ✓ changes in creation and use of tools and procedures to mainstream gender equality;
- ✓ new initiatives and partnerships to create synergies for collaboration on gender equality;
- ✓ changes in recruitment practices in favour of equal opportunities;
- ✓ changes in budget allocation in favour of gender at this level.

Micro level

Indicators at this level are needed in order to measure the following:

- ✓ participation (quantity/quality) of women and men in project activities;
- ✓ access to decision-making, project resources and project services by women and men;
- ✓ expected/unexpected project outcomes for women/men (compared with project objectives);
- ✓ met/unmet practical and strategic needs of women and men (compared with expressed needs);
- ✓ changes in project budget allocation in favour of gender at this level;
- ✓ changes in project staff's capacity to mainstream gender equality;
- ✓ emergence of new gender issues in the project or as a result of the project.



KEY POINTS

- ✓ A gender-sensitive indicator measures gender-related changes in society over time.
- ✓ Gender-sensitive indicators may be developed when sex-disaggregated data and other qualitative information reflecting gender differences are available.
- ✓ Quantitative indicators indicate average outcomes in a sex-disaggregated manner. When data is available, they tend to be easier to define, record and assess.
- ✓ Qualitative indicators involve people's perceptions, for instance changes in attitudes and behaviour; or growth in knowledge and skills, self-reliance, confidence, independence or self-esteem.
- ✓ It is important to be clear about the types of indicator required at different levels.