

# **Gender Mainstreaming in Development Planning**

**A Reference Manual for Governments  
and Other Stakeholders**



Vivienne Taylor



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**Commonwealth Secretariat**

*Gender Management System Series*

Gender Management System Handbook

Using Gender-Sensitive Indicators: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in Development Planning: A Reference Manual for Governments and Other Stakeholders

Gender Mainstreaming in Finance: A Reference Manual for Governments and Other Stakeholders

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A Quick Guide to Gender and Equal Employment Opportunities

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# Preface

In 1996, Commonwealth Ministers Responsible for Women's Affairs mandated the Commonwealth Secretariat to develop the concept of the Gender Management System (GMS), a comprehensive network of structures, mechanisms and processes for bringing a gender perspective to bear in the mainstream of all government policies, programmes and projects. The success of the GMS depends upon a broad-based partnership in society in which government consults and acts co-operatively with the other key stakeholders, who include civil society and the private sector. The establishment and strengthening of gender management systems and of national women's machineries was the first of 15 government action points identified in the 1995 Commonwealth Plan of Action on Gender and Development.

This reference manual has been produced to assist member governments in meeting their commitment to implementing the Plan of Action. It is hoped that it will be used by development policy-makers, planners, field staff and others, in conjunction with other publications relating to the particular national context.

The reference manual is intended to assist readers in using a GMS to mainstream gender in the development planning ministry of national governments. It is part of the Gender Management System Series, which provides tools and sector-specific guidelines for gender mainstreaming. This manual is intended to be used in combination with the other documents in the series, particularly the *Gender Management System Handbook*, which presents the conceptual and methodological framework of the GMS. This manual is also available in an abridged form under the title *A Quick Guide to Gender Mainstreaming in Development Planning*.

The development of the GMS Series has been a collaborative effort between the Commonwealth Secretariat's Gender and Youth Affairs Division and many individuals and groups. Their contributions are gratefully acknowledged. In particular, I would like to thank the following: all those member governments who supported the development of the GMS and encouraged us to move the project forward; participants at the first GMS meeting in Britain in February 1997 and at the GMS Workshop in Malta in April 1998, who provided invaluable conceptual input and feedback; and the Steering Committee on the Plan of Action (SCOPA). I am also most grateful to: the various consultants who worked on the manual, including Vivienne Taylor, University of the Western Cape, South Africa, who wrote the text, and Daniel Woolford, Consultant Editor of the GMS series, who revised and edited it for publication; and the staff of the Gender Affairs Department, Gender and Youth Affairs Division, Commonwealth Secretariat, particularly Ms Eleni Stamiris, former Director of the Division, who took the lead in formulating the GMS concept and mobilising the various stakeholders in its development, Dr Judith May-Parker who provided substantive editorial input, and Dr Rawwida Baksh-Soodeen, Project Co-ordinator of the GMS Series, who guided the project through to publication.

We hope that this resource series will be of genuine use to you in your efforts to mainstream gender.

**Nancy Spence**  
Director  
*Gender and Youth Affairs Division*  
Commonwealth Secretariat

## Executive Summary

This manual is intended to serve as a guide to governments and other organisations that are seeking to advance gender equality and equity through the mainstreaming of gender in development planning. Gender mainstreaming involves addressing gender inequalities in all aspects of development, across all sectors and programmes, especially in decision-making structures. The Commonwealth model for achieving this is the Gender Management System (GMS), an integrated system of structures, mechanisms and processes for advancing gender equality and equity.

Current indicators of development in most regions reveal that women remain the majority living in poverty (especially in rural areas), are victims of all types of violence, generally have lower literacy rates than men, and have experienced the least improvement in their quality of life. But few concrete attempts have been made to address the root causes of gender inequalities and the continued economic exploitation of women, even though women's paid and unpaid labour contributes significantly to the social economy and production processes.

Comprehensive planning systems have tended to fall out of use because governments assume that market forces increasingly dictate the pace of growth and development in the private sector. Increasingly, there is an uncritical acceptance of alternative approaches to planning, such as incremental planning, partial planning, or strategic planning. This has resulted in minimally regulated economic and social institutions and marginal state intervention in the market, with little benefit for those (usually women) who operate outside of the formal markets.

Many developing countries have adopted an anti-cyclical planning process that is supply-driven, technologically efficient and profit-oriented, seeking to achieve the full use of a country's resources for social and economic progress through existing institutions and systems. The anti-cyclical planning approach tends to have a negative impact on social development and gender relations, with increasing gender inequalities, joblessness for women and the 'feminisation of poverty'.

This manual understands development as including the concept of human development, which is measured not only according to economic indicators such as gross national product (GNP) but also according to other indicators. These include health (life expectancy) and education (literacy and enrolment) which together with purchasing power provide the basis of the UNDP's Human Development Index. In analysing gender inequalities, the GMS includes the human development indicators and looks further, to such areas as participation in political decision-making and the appropriateness of legislative and administrative systems.

Gender planning prioritises the needs and conditions in which women live and work as a site for change. It involves a critical analysis of the gaps between women's and men's access to economic, social political and cultural resources. This analysis enables the development of policy initiatives to correct the imbalances – including cases where men are not benefiting equally from the development planning approaches currently in use.

Gender planning should not be seen as a separate, parallel process to mainstream development planning but should transform mainstream planning to address the needs of women and poor people generally through an economically, socially and environmentally sustainable process.

## Approaches to Development Planning and Gender Analysis

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In efforts to respond to the needs of women, the Women in Development (WID) policy framework emerged in the mid-1970s. The WID approach in development planning sought to 'add on' women-specific projects to existing activities. Failing to address the systemic causes of gender inequalities, this approach tended to view women as passive recipients of development assistance, rather than as active agents in transforming their own economic, social, political and cultural realities. It was therefore usually gender-blind and ultimately biased against women.

The Gender and Development (GAD) framework emerged in response to these flaws. It recognises that improving the status of women is not a separate, isolated issue but needs to be addressed by taking into account the status of both men and women, their differing life courses and the fact that equal treatment will not necessarily produce equal outcomes.

Because men and women tend to have different roles and responsibilities, they also have different needs, identified as practical and strategic gender needs. Practical gender needs emanate from the actual conditions people experience due to the gender roles ascribed to them by society. Strategic gender needs point to what is required to overcome the generally subordinate position of women to men in society and relate to empowerment. Planners generally respond only to the practical needs of women without relating these to their strategic needs. A twin approach is required which identifies the links between practical and strategic gender needs, and proposes policy and planning frameworks to address both within institutions.

## The State of Development Planning

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This section examines the major issues in development planning, identifies some gender-related problems that can arise, and points to possible solutions through suggested action points that governments may wish to adapt to national circumstances.

### Political will and adequate resources

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Some governments do not have an overarching policy or framework which could be used to guide the promotion of gender equality. Many others take a Women in Development approach which fails to address the root causes of gender inequalities. Where gender policies do exist, they are often hampered by a lack of political will and authority to guide their implementation. Without an explicit gender policy to provide guidelines on how government departments should institutionalise gender internally or respond to the needs of both women and men in society, planning agencies are not obliged to implement, monitor or evaluate gendered development goals. Governments are also constrained by a lack of qualified personnel and administrative capacity to implement gender plans.

#### Action points:

- ◆ advocate for political commitment at the highest levels;
- ◆ promote participatory democracy and decentralise planning processes.

### Development planning and macroeconomic policy

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Traditional methods of development planning tend to be based on efficiency and control and to be driven by a focus on growth. Many governments introduced development planning structures and systems as a means of ensuring that macroeconomic goals were attained. Infrastructural development and services within

the development plan were driven by economic goals rather than the need to advance human development. In the process of attaining economic growth, the social development of people and particularly of women has often been neglected.

**Action points:**

- ◆ set women's economic empowerment as part of macroeconomic goals;
- ◆ accord value to women's work;
- ◆ use appropriate sex-disaggregated data;
- ◆ analyse the impact of economic, structural adjustment programmes;
- ◆ a critical gender analysis of the root causes of social problems is essential.

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**Institutional concerns**

Planning tends to have a sectoral bias which results in a fragmented, compartmentalised approach and ignores cross-cutting gender needs and concerns. This problem is compounded in many countries where no single authority or agency takes the responsibility for implementing the country's overall development programme. As a result, the failure to meet the needs of women in the different sectors is not evaluated.

**Action points:**

- ◆ integrate strategic gender needs through effective co-ordination of planning cycles;
- ◆ establish structures and mechanisms to advance gender equality;
- ◆ recruit women as well as men into the planning field;
- ◆ introduce gender policy/planning training into planning agencies;
- ◆ ensure that systems of governance and planning are accountable, transparent and accessible;
- ◆ promote participant involvement in monitoring and evaluation.

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**Public and private spheres**

Where an attempt is made to improve the position of women, this is usually in the public sphere and does not necessarily result in changes in gender relations within the home. Power relations in the private sphere are among a number of factors contributing to women's failure to make effective use of changes in the public sphere to advance gender equality.

**Action points:**

- ◆ ensure that primary, secondary, tertiary and continuing education curricula and processes are gender-aware;
- ◆ promote the potential of development projects in all sectors to change ethnocentric gender stereotyping.

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**Mainstreaming Gender in Planning Cycles**

Gender-aware policy and planning are important tools to effect a positive change in women's conditions. Gender-aware policies and plans are more likely to respond to deep seated patterns of discrimination against women when women themselves collectively analyse and contribute to policy-making and planning processes. In cases where men are not benefiting equally from development planning strategies, a gender-aware approach enables interventions to correct the imbalance.

There are usually four major planning cycles through which most developing countries seek to respond to national needs and issues. These are: the macro/sectoral policy cycle, the budget cycle, the aid cycle and the project cycle. These cycles when

brought together through a planning process usually reflect a government's medium term (5-10 year period) expenditure plan.

In establishing macro policy frameworks, gender analysis and outputs need to be included to ensure effective policies which address the needs of all sectors of the population. Approaches to policy-making which influence gender outcomes can be categorised in three types: gender-neutral, gender-specific and gender-aware/redistributive/transformational. Generally policy and programme interventions could fall within a welfare, equity or transformation/empowerment approach. A welfare approach usually responds to meeting the practical needs of women (gender-specific), whereas a transformational approach responds to meeting strategic needs (gender-transformational).

The potential of gender policy to transform gender relations and the gender-biased distribution of resources is greatly enhanced if that policy is developed through a participatory process involving key decision-makers within the department concerned and in other related sectors, as well as with the groups and communities the policy is intended to benefit.

In the preparation of a gender-aware medium-term development plan, 'engendered' inputs from the macro and sectoral policy planning cycles can be combined to produce a medium-term plan of expenditure which then informs the preparation of annual budget expenditures. These then feed into the project cycles in the various sectors.

## **Tools for Gender Mainstreaming in Development Planning**

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Access to relevant sex-disaggregated data has been identified as an important element in mainstreaming gender into development planning. Gender-sensitive indicators are potentially of great usefulness in integrating gender considerations into development planning. However, it should be recognised that there are limitations on the amount and type of information they can provide, and that care needs to be taken in their interpretation.

The Commonwealth Secretariat has developed a series of policy options for integrating gender into national budgetary policies in the context of economic reform. The policy options centre on six possible tools:

- ◆ sex-disaggregated beneficiary assessments;
- ◆ sex-disaggregated public expenditure incidence analysis;
- ◆ gender-aware policy evaluation of public expenditure;
- ◆ gender-aware budget statement;
- ◆ sex-disaggregated analysis of the impact of the budget on time use; and
- ◆ gender-aware medium-term economic policy framework.

## **Two Commonwealth Approaches to Gender Equality**

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This section looks at some general indicators on the situation of women in two Commonwealth countries, India and South Africa, and efforts by governments to advance gender equality in those countries. It also develops a typology of these countries' planning responses to gender.

# 1

## Introduction

The Fourth World Conference on Women in Beijing (1995) and the Beijing Platform for Action have provided new impetus for governments and civil society organisations to address gender inequalities in society at all levels. Initiatives in this regard have emerged out of a process that began with the UN Decade for Women in 1975-85 and the Nairobi Forward-Looking Strategies in 1985, and continued through the major UN world conferences of the 1990s, particularly the Environment Conference (Rio de Janeiro, 1992), the Human Rights Conference (Vienna, 1993), the Population and Development Conference (Cairo, 1994), and the Social Development Summit (Copenhagen, 1995). Women are determined that commitments made by governments at these conferences to promote gender equality and equity are implemented. However, this poses many challenges.

### **Purpose and Scope of this Manual**

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This manual is intended for governments and other organisations that are seeking to advance gender equality and equity through the mainstreaming of gender in development planning. The Commonwealth is promoting gender mainstreaming by means of the Gender Management System (GMS), a comprehensive system of structures, process and mechanisms for advancing gender equality and equity. The GMS is designed primarily for use by national governments in developing countries, but includes elements that may be of use to provincial or local governments, regional organisations, NGOs, academic institutions and the broader civil society.

This manual is intended for use in combination with other documents in the GMS series, especially the *Gender Management System Handbook* which provides a general introduction to the GMS and a guide for gender mainstreaming in national governments.

Gender mainstreaming is an approach to advancing gender equality that involves addressing gender inequalities in all aspects of development, across all sectors and programmes. Mainstreaming is not simply about ensuring that women's position is improved within existing frameworks which are dominated by men. Gender is mainstreamed when the development process and frameworks are transformed in ways which ensure the participation and empowerment of women as well as men in all aspects of life and especially in decision-making structures.

### **Changes in Approaches to Development Planning**

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The question of mainstreaming gender into government ministries and agencies responsible for development planning raises a number of issues. Traditional planning approaches have been called into question by major changes at the national and international levels resulting from globalisation, including the emergence of the

World Trade Organisation, the development of new trade regimes and alliances, attacks on preferential agreements, and the shift from production to a service orientation in many economies. There have also been changes in the geopolitical landscape such as the demise of the Eastern European bloc, the push for multi-party democracies in Africa and elsewhere, and the new national, regional and global alignments around governance and economic issues.

The accelerated shift to market-driven economies within a global system that determines terms of trade, foreign exchange controls and the boundaries within which local economies can develop has a significant impact on planning processes. An outcome of shifts in economic planning processes has been the appearance of new forms of exploitation, discrimination and domination – a result, many argue, of globalisation. While the imperatives of economic growth have influenced terms of trade and foreign relations in most countries, women have raised their voices against economic growth models that have not included human development and women's development as a central element.

Governments recognise that current indicators of development in most regions reveal that women, who constitute more than 50 per cent of the population in most countries, remain the majority living in poverty (especially in rural areas), are victims of all types of violence, generally have lower literacy rates than men, and have experienced the least improvement in their quality of life. In some areas, male marginalisation, especially among young people, is also recognised as a significant problem of gender inequality.

But few concrete attempts have been made to address the root causes of gender injustice and the continued economic exploitation of women, even though women's paid and unpaid labour contributes significantly to the social economy and production processes. Governments' attempts to address gender inequalities have usually taken place in the context of an 'add on' approach based on a particular understanding of women's position and of planning, rather than in the context of a critical analysis of the political, social and institutional framework. Because of their inherent power imbalances, the dominant frameworks reinforce and promote existing gender hierarchies. Gender analysis<sup>2</sup> and a gendered perspective in the dominant development framework is frequently missing, especially in the development planning sector.

Comprehensive planning systems can take the form of long-range national development plans with a multi-sector approach through which countries attempt to promote accelerated economic growth and social development led usually by governments. They generally include an integrated public investment plan and a plan for the private sector. They are comprehensive because they cover the entire economy in their targets and forecasts. However, comprehensive planning systems with respect to government forecasts, estimates and private-sector interventions have tended to fall out of use because governments assume that market forces increasingly dictate the pace of growth and development in the private sector. Increasingly, there is an uncritical acceptance of alternative approaches to planning, such as:

- ◆ incremental planning, which is the process of making slight adjustments to an existing framework without major changes to its goals or priorities;
- ◆ partial planning, which entails planning for part of the economy, usually the government's investment plan, with the setting of estimates and goals; or
- ◆ strategic planning, the process of linking needs and conditions in the policy environment to strategic choices within organisations.

Planning therefore tends to be partial in nature, with a focus limited to public investment plans and little attempt on the part of governments to complement the public investment plan with a private sector plan. This has resulted in minimally regulated economic and social institutions and marginal state intervention in the market, with little benefit for those (usually women) who operate outside the formal markets.

Some economic planners have promoted the idea that minimal state intervention in economic and social planning is a necessary and desired condition for rapid economic growth. Many developing countries have moved away from traditional methods of development planning to an anti-cyclical planning process that is supply driven, technologically efficient and profit-oriented. The anti-cyclical approach seeks to achieve the full use of a country's resources for social and economic progress through existing institutions and systems. The private sector is allowed to determine the direction and pace of growth, since this type of planning is generally in use in industrialised countries and assumes that existing institutions operate at acceptable levels of efficiency. Anti-cyclical planning is incremental in nature because it introduces minor changes to maintain existing levels of stability by using monetary and fiscal policies as instruments. The economic structural adjustment programmes of the World Bank are consistent with anti-cyclical planning. This type of planning ignores the structural conditions and systemic crises in which most developing countries find themselves.

As Waterston (1982: 26) states, anti-cyclical planning is significantly different from development planning. While the basic objective of anti-cyclical planning is to increase demand within the economic, social and institutional framework of a market economy, development planning seeks to change that framework, and in the process to accelerate the rate of economic and social progress.

The anti-cyclical planning approach tends to have a negative impact on social development and gender relations, with increasing gender inequalities, joblessness for women and the 'feminisation of poverty'. So, while the rhetoric of planning remains, planning outcomes have failed to attain the type of growth that would promote sustainable human development.

Many Commonwealth governments are seeking to move away from the heritage of inefficient bureaucracies, inequities in social service delivery, and ever increasing gender disparities, and at the same time change technicist planning processes towards more participatory and engendered ones.

For these and other reasons, development planning as a participatory process to promote integrated, holistic development which links economic, social and political goals is returning to the forefront in the search for a human development paradigm. Development planning is seen as a way of balancing the needs of people with the need for sustainable economic development.

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## Human Development

Development should be an integrated, holistic process that meets people's economic, social, political, cultural and environmental needs and improves the quality of life for all. This understanding of development includes the concept of human development, which is measured not only according to economic indicators such as gross national product (GNP) but also according to health (life expectancy) and education (literacy and enrolment). This is the basis of the UNDP's Human Development Index, which ranks countries worldwide according to these three indicators.

Human development has two key elements, the development of human capabilities and the development of opportunities for people to use these capabilities. It brings together the production and distribution of commodities and resources and the expansion and use of human capabilities (UNDP, 1995: 11-12).

The importance of human development for women is the recognition that "if it is not engendered it is endangered" (UNDP, 1995). Human development cannot be

equitable, sustainable or holistic unless it addresses gender inequalities and the needs of both women and men.

An important contribution to the advancement of gender equality within the human development paradigm has been the design of two new indices, the gender-related development index (GDI) and the gender empowerment measure (GEM). These indices are used to compare gender inequality in human capability (GDI) and inequalities in key areas of political and economic decision-making structures (GEM) (UNDP, 1995).

In its approach to gender analysis, the GMS includes the human development indicators and also looks to such areas as participation in political decision-making and the appropriateness of legislative and administrative systems.

## Gender Planning

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While most current planning methods seek to promote economic growth, gender planning prioritises the needs and conditions in which women live and work as a site for change. It is a site in which power is used, largely within male-dominated perspectives of what is 'good' economically determined development, to promote the status quo in which women, for the most part, remain oppressed and subordinate.

Gender planning involves a critical analysis of the gaps between women's and men's access to economic, social, political and cultural resources. This analysis enables the development of policy initiatives to correct the imbalances – including cases where men are not benefiting equally from the development planning approaches currently in use.

Gender planning proponents see traditional planning as not only technically driven and gender-blind but as part of the problem of development. Traditional planning limits the type of interventions that could be made by planning authorities to address strategic gender concerns. In contrast, gender planning is socio-political and technical in nature, assumes conflict in the planning process, involves transformative processes, characterises planning as dialogue and critically examines the following current planning assumptions:

- ◆ that a planning methodology can simply adopt a universally applicable set of technical procedures; and
- ◆ that the extent to which planners determine people's demands and prioritise needs reflects the situation on the ground.

### Convergence between development planning and gender planning

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Development and gender planning converge in respect of the goals of planning. It is logical to assume that, if women constitute the poorest, are the most subordinate and are consistently denied access to the rights, services and benefits of society, then planning needs to be informed by a gender analysis which seeks to address the root causes of these gender-based inequalities. Gender planning should therefore not be seen as a separate, parallel process to mainstream development planning but should transform mainstream development planning to address the needs of women and poor people generally through an economically, socially and environmentally sustainable process.

#### Notes

- 1 'Add on' in this context means an incremental response to women's unequal position by creating new projects and including them in existing programmes without changing the existing programmes.
- 2 Gender analysis is the critical examination of a problem, issue or situation to understand the root causes of gender inequality or discrimination as it affects women and men in the development process.

## 2

## Approaches to Development Planning and Gender Analysis

### From Women in Development to Gender and Development

Efforts to promote gender equality have in recent years shifted in focus from ‘women in development’ to ‘gender and development’. The ‘women in development’ approach began with an uncritical acceptance of existing social structures and focused on how women could be better integrated into existing development initiatives. Targeting women’s productive work to the exclusion of their reproductive work, this approach was characterised by income-generating projects for women that failed to address the systemic causes of gender inequality. It also tended to view women as passive recipients of development assistance, rather than as active agents in transforming their own economic, social, political and cultural realities.

A key outcome was that woman’s concerns were viewed in isolation, as separate issues, leading to their marginalisation in the state system and other structures.

The gender and development approach, which forms the basis of the Plan of Action, focuses more on the fact that women and men have different life courses and that development policies affect them differently. It seeks to address these differences by mainstreaming gender into development planning at all levels and in all sectors, focusing less on providing equal treatment for men and women (since equal treatment does not necessarily result in equal outcomes) and more on taking whatever steps are necessary to ensure equal outcomes. It recognises that improving the status of women cannot be understood as a separate, isolated issue and can only be achieved by taking into account the status of both women and men.

The gender and development approach is built on an awareness not only of the differences between men and women but also of the inequalities that emanate from these differences. It seeks to address not only women’s practical gender needs (the immediate material needs of women in their existing roles as, for example, housewives and mothers) but also their strategic gender interests (the necessity of changing the position of women in society – addressing inequalities in employment, political participation and cultural and legal status).

Table 1 presents a typology of government attempts to address gender issues in development planning. While the contexts within which these policy approaches have been attempted vary, broadly speaking, the welfare, anti-poverty and efficiency approaches can be linked to a WID framework, while equity and empowerment/transformation are more consistent with the GAD framework.

### Practical and Strategic Gender Needs

Because men and women have different roles and responsibilities, they also have different needs, identified as practical and strategic gender needs.

**Practical gender needs** emanate from the actual conditions people experience due to the gender roles ascribed to them by society. In the case of women, these needs are often related to women's roles as mothers, homemakers and providers of basic needs. Projects can meet the practical gender needs of both men and women without necessarily changing their relative position in society.

**Strategic gender needs** point to what is required to overcome the generally subordinate position of women to men in society and relate to women's empowerment. Such needs vary according to social, economic and political context. Most governments now acknowledge the need to create opportunities which enable women to address their strategic needs.

Table 1 **A Typology of Government Attempts to Engender Development Planning**

Policy Approach	Role of the State	Type of Development	Planning Data
<p><b>Welfare</b> It is seen as a safety net to cushion the negative impact of the 'free market' on the lives of poor people. Locate women in family.</p>	Limited role. Only acts when there is extreme pressure. Then promotes an incremental, piecemeal response to address symptoms through sectors.	Based on promoting accelerated economic growth through industrialisation. Limited emphasis on building human resources except in respect of skills for the market.	Limited to socioeconomic indicators with human development index (HDI) more recently. Little information on gender. Not much sectoral information except in the health sector
<p><b>Anti-Poverty</b> Promotes the thinking that helping poor women will increase their productivity and promote economic growth. Poverty is seen as the problem due to under-development – not unequal power relations.</p>	Role seen only as co-ordination through nation-wide anti-poverty campaigns. Emphasis on improving women as 'vehicles of development' not in their own right.	Neglect of rural economy. Modernising economy and promoting small scale businesses and income generating products. Emphasis on employing women in certain sectors such as the service industry/craft. 'Trickle down' effect of economic growth to benefit women.	Central Statistical Services (CSS) provide national data. Emphasis on socioeconomic indices and Human Development Index. Data obtained only in respect of numbers of women experiencing poverty.
<p><b>Efficiency</b> Recent approach. Acceptance that because of changing global arrangements women's production role as cheap labour is critical to economic development. Thinking women can help to make the system work better.</p>	Promotes private sector involvement in employment of women. Promotes policy of equal opportunities not equality of conditions. Does not interfere in regulating market but emphasis is on labour policies and skills development	Economic development and faster growth through human resource capacity building. Emphasis on vocational skills and training unemployed. Modernisation and rural development.	CSS obtain data emphasis on HDI, levels of literacy, etc. Economic indices and human resources. Breakdown information on female 'dropouts' from school etc.
<p><b>Equity</b> Promotes recognition of women's contribution to development (waged and unpaid) and fair treatment because of its value.</p>	Regulatory role high. State provides legal framework for fair treatment of women especially in political and economic sphere.	Based on increased state regulation by the economic sector and active state intervention. State led economic growth through modernisation.	General statistical data relevant to HDI and economic indices of development. Emphasis on sex-disaggregated data to show gender inequities.

Planners generally respond to the practical needs of women without relating these to their strategic needs. Strategic gender needs are the needs of women which arise out of their subordinate position to men in society. They relate to institutionalised patterns of discrimination such as gender divisions of labour, denial of legal rights to women, and women's lack of access to power and control over their bodies. Strategic gender interests and needs are linked to practical, material needs. A twin approach is required which identifies the links between practical and strategic gender needs and proposes policy and planning frameworks to address both within institutions. Development responses that remain exclusively within the 'add-on' project approach tend to be inadequate to meeting strategic gender needs.

Women's Role in Decision-making	Macroeconomic Framework	Integration of Gender in Planning	Distribution of Resources	Impact on Gender Inequalities
Limited marginal role. Medium to high part in community managing and in household. Participation in meeting practical needs through projects.	Emphasis on reducing deficits, cutting back on public expenditure, especially on social services. Repayment of debt and servicing. Women seen as dependants.	No efforts made. Gender seen as women's responsibility through welfare departments.	Limited funding. High reliance on donor aid for self-help projects. Tax incentives for private sector to assist with poverty alleviation through social responsibility.	No impact. Some practical needs met. Women seen as passive recipients of welfare. Their only recognised roles are reproduction and community management.
Not promoted. Limited to women's organisations and projects. Only evident in projects and NGOs.	Same as welfare except emphasis on donor support and funds to address poverty. Introduction of public works programmes. Emphasis on role of the poor in informal economy as survival strategy.	Not evident in Commonwealth governments except through (women's units) in welfare departments and rural development strategies.	Funding through loans and grants available for anti-poverty programmes. Donor and private sector support provided for small income generating projects.	Limited to only meeting practical gender needs (basic needs) but often not very successfully.
Increase numbers of women in economic activity. Emphasis on local self management uses women to carry out tasks.	Emphasis on efficient management of economy increased productivity investments from domestic and foreign capital. Trade liberalisation, lowering deficit and taxes, increasing education and health budgets, promoting domestic savings	No structural changes. Integration through sectoral programme/project plans especially in education health and welfare or women's units.	Funds for sectors through national budgets – health, education and unemployment programmes. Donor support small business and income generating projects of women. Support training projects, especially for women.	Greater visibility of women in productive roles. Increases women's alienation, exploitation and burden of multiple roles, preventing them from using increased participation to change decision-making structures. Structural inequalities remain.
Promote increased role. See women as already in decision-making structures but in need of recognition.	Increased deficits. Investment in public enterprises. High taxes on corporations. Public service and social expenditure high. States affected by ESAPs.	Non-existent in community. Would be high if it took off. But state power usually means male domination.		Using an equity approach has some potential in respect of gender but on its own it cannot address systemic problems of inequality.

Table 1 continued A Typology of Government Attempts to Engender Development Planning

Policy Approach	Role of the State	Type of Development	Planning Data
<b>Empowerment/Transformation</b> By raising gender awareness and a critical analysis of social and structural problems through mass based popular development education, poor women and men would become empowered and enabled to use democratic space to change or engage in a process of transforming oppressive structures, policies and programmes. Process to lead to economic, political, social, empowerment of women.	Significant role in promoting rights of women and poor people. Important role in ensuring democratic practices and promoting a critical partnership between organisations of civil society. Enforcement of human rights and protocols for workers' rights.	Integrated, sustainable. Promoting economic growth and redistribution. Emphasis on limiting monopolies promoting rural and urban development. Increased role of NGOs and CSOs in development process	Change national census process. All data to be broken down in terms of gender, race and other categories. Both social and economic indicators. Push for new indices to measure women's work and its value.

Table 2

Source: Moser (1993: 49)

a Changing the gender division of labour

b Control over financial services

c Overcoming discrimination against women owning land, by law or tradition

d Sharing the burden of domestic labour between women and men

### Multiple roles of women and meeting gender needs

Women engage in multiple roles within the sphere of social reproduction and what is termed productive activity. These roles are categorised by Moser as follows:

- ◆ **the productive role:** this refers to market production and home/subsistence production undertaken by women which generates an income (whether financial or 'in kind');
- ◆ **the reproductive role:** this refers to the childbearing and child-rearing responsibilities borne by women – which are essential to the reproduction of the workforce; and
- ◆ **the community management role:** this refers to activities undertaken by women to ensure the provision of resources at the community level, as an extension of their reproductive role (1993: 49).

To emphasise one against the other is to lose sight of the fact that women are carrying a heavy burden and that their actual working hours far outnumber those of men working in the productive sector.

Moser (1993: 49) proposes a way to link women's practical needs to strategic gender needs (see Table 2). She identifies the type of intervention in three areas/sectors (employment, human settlement and basic services), the different roles women play in respect of reproduction, production and community managing activities and whether in these examples the needs would be practical or strategic. Using Table 2 as a tool to address the multiple roles of women can be one way to bring about a change in women's positions. Planners could use Table 2 to analyse whether government policy in key areas is responding to gender needs in the different spheres in which women live and work.

Table 2 also indicates that because women still spend excessive amounts of time and energy on practical gender needs they do not have the time to mobilise for change on strategic gender needs (see column on gender need met).

Women's Role in Decision-making	Macroeconomic Framework	Integration of Gender in Planning	Distribution of Resources	Impact on Gender Inequalities
Promoted at all levels. Not only in terms of increased numbers but assisting through training to help women make informed decisions and through participation change quality of decision making and its processes.	Emphasis on meeting fundamental human needs through state social and economic goals. Increasing consumption. Deficits not seen as important. Increased taxation. Greater participation of the poor in economy. Promotion of social market – mixed economy approach. Increased labour intensive employment strategies.	New structures and policies required. Gender to be included and integrated into development planning.	Public funds used to bring about land reform, restitution and agricultural development. Increases in social service budgets, efficient public sector with public enterprises to show profit. Donor grants for restructuring governance. Training and education of women not widely accepted.	Potential impact to address strategic gender needs great. But not accepted by mainstream development agencies. Promoted through progressive women's movements.

**Table 2 Women's Triple Role and Meeting Practical/Strategic Gender Needs**

Type of Intervention	Women's Role Recognised			Gender Need Met	
	Reproductive	Productive	Community Management	Practical	Strategic
<b>1 Employment Policy</b>					
(i) Skill training					
<i>Cooking</i>	♦			♦	
<i>Dressmaking</i>		♦		♦	
<i>Masonry/carpentry</i>		♦		♦	♦ <sup>a</sup>
(ii) Access to credit					
<i>Allocated to household</i>		♦		♦	
<i>Allocated to women</i>		♦		♦	♦ <sup>b</sup>
<b>2 Human Settlement Policy</b>					
(i) Zoning legislation					
<i>Separates residence and work</i>	♦				
<i>Does not separate residence and work</i>	♦	♦		♦	
(iii) House ownership					
<i>In man's name</i>	♦			♦	
<i>In woman's name</i>	♦	♦		♦	♦ <sup>c</sup>
<b>3 Basic Services</b>					
(i) Location of nursery					
<i>Located in community</i>	♦	♦	♦	♦	
<i>Mother's workplace</i>	♦	♦		♦	
<i>Father's workplace</i>	♦	♦		♦	♦ <sup>d</sup>
(ii) Transport services					
<i>Only peak-hour bus service</i>		♦		♦	
<i>Adequate off-peak service</i>	♦	♦	♦	♦	
(iii) Timing of rural extension meetings					
<i>In the morning</i>		♦		♦	
<i>In the afternoon/evening</i>	♦	♦	♦	♦	

# 3

## The State of Development Planning

This section examines the major issues in development planning, identifies some gender-related problems that can arise, and points to possible solutions by way of suggested action points that governments may wish to adapt to national circumstances.

### **Political Will and Adequate Financial and Other Resources**

Some governments do not have an overarching policy or framework which could be used to guide the promotion of gender equality. Many others take a Women in Development approach which fails to address the root causes of gender inequalities. Where gender policies do exist, they are often hampered by a lack of political will and authority to guide their implementation. An explicit gender policy is required, providing guidelines on how government departments should institutionalise gender internally and respond to women's needs in society, such that planning agencies are obliged to implement, monitor and evaluate gendered development goals.

Governments are constrained by a lack of qualified personnel and administrative capacity to implement gender plans and have not accepted that efficient planning is gender responsive planning. Most governments do not have the resource capacity to carry out a gender audit with regard to the existing provision of services.

### **Advocate for political commitment at the highest levels**

Many Commonwealth governments have ratified the Convention on the Elimination of all forms of Discrimination Against Women, and all subscribe to the 1991 Harare Commonwealth Declaration, which pledges governments to work with renewed vigour on, among other areas: "equality for women, so that they may exercise their full and equal rights" (Harare Commonwealth Declaration, 1991: 9).

A strong political commitment to gender equality is demonstrated by the location of the Ministry of Women's Affairs, women's bureau or similar body in a high-profile, central sector of government, such as the Office of the Prime Minister or President, and by the availability of sufficient human and financial resources to mainstream gender across all sectors of government.

### **Promote participatory democracy and decentralise planning processes**

From a gender perspective, participatory democracy can only result from the wide-ranging involvement of women in all spheres of public life and decision-making. Political restructuring in some countries (for example, India at the local government level through the Panchayati Raj, and South Africa) has given new impetus for sectors of governments to review ways to increase women's participation in the decision-making process.

Planning as a process should begin at the local level with representatives of both civil society and government involved. For example, in India, local government elections created the possibility of wide-ranging changes in decision-making at the local level through the quota of 33 per cent of seats being reserved for women as a result of the 73rd and 74th Constitutional Amendments in respect of states.

However, even where such arrangements are in place, a gender perspective is not necessarily integrated, for a number of reasons.

Firstly, women's representation in local government structures does not automatically result in their informed and effective participation in these structures (Taylor, 1996). For this to happen women and men require a critical gender analysis of the roots of women's oppression and the strategic interventions that are possible through their participation. This can only result from gender awareness, training and organisational change.

Secondly, local government decision-making structures such as those in South Africa and India which have more women on them than ever before are a political advance but will only produce results in development terms, especially in planning, if the functions and powers of these structures are clarified and if devolving power to the local level does not mean devolving financial responsibility for the delivery of services and development projects without the necessary resource allocations.

Decentralisation of development planning should therefore include a restructuring of the system, devolving functions and powers from state/provincial governments and ensuring a sound resource base and resource allocations from central and state governments. Most importantly, it should lead to a planning process that promotes strategic gender goals from the bottom up through a co-ordinated system.

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## **Development Planning and Macroeconomic Policy**

Traditional methods of development planning tend to be based on efficiency and control and to be driven by a focus on growth. It is now accepted that economic growth on its own is not a sufficient condition for development (UNDP, 1995). Economic growth projections and allocations based on quantitative measures and number-crunching exercises led by state expenditure departments within Finance Ministries do not allow for responsiveness to new priorities or targets and provide little space for engagement with political decision-making processes.

Many governments introduced development planning structures and systems as a means of ensuring that macroeconomic goals were attained. The development plan became the economic policy instrument to ensure a process of setting ceilings for public expenditure, allocations for public sector investment and incentives for private sector investments. Infrastructural development and services within the plan were driven by economic goals rather than the need to advance human development. In the process of attaining economic growth, the social development of people and particularly of women has often been neglected.

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### **Set women's economic empowerment as part of macroeconomic goals**

Women's integration into the economic system of developing countries is mainly at the lower end, because generally women and men are allotted different work roles. Women tend to be confined to menial, low-skilled, low-status and poorly paid jobs while men usually have jobs with higher status and pay. Women dominate in unpaid domestic work and subsistence food production while men dominate in waged employment and

cash crop production. Women need to be afforded opportunities through education and training programmes, access to credit and land and other opportunities so that they can become equal participants in mainstream economic activity at all levels.

Women's position should also be considered as a critical part of the labour market when macroeconomic targets are set for economic growth. The manner in which capital intensive and technologically advanced industry affects labour mobility and conditions should be assessed from a gender perspective so that women do not become a cheap alternative within competitive markets. The economic and social wage (social security benefits, training, etc.) should be reviewed to ensure equity between male and female workers. The negative effects of globalisation on labour markets should be examined to prevent new forms of women's exploitation in the workplace and other economic activities.

In some regions it has been found that, when women's labour and what it contributes at the household and project levels are overlooked, when their need for economic incentives are not understood and resources relevant to their productive work are directed to men, development policies and projects fail to meet their goals. Despite this, governments have not, for the most part, realigned development policies or altered the design of major economic projects so as to support women's productive work and therefore strengthen their contribution to national productivity goals.

### **Accord value to women's work**

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The general opinion is that it is difficult to place a value on the time women spend in social reproduction<sup>1</sup> and to translate this value into easily quantifiable data to measure their contribution to the economy. While this may be a technical problem it should not prevent planners and statisticians from formally recognising and acknowledging the social value of women's work and its economic contribution. The manner in which national accounting systems assess and monitor the value of women's work within the household, in the formal economy and at community levels, is critical. In the view of many scholars and activists, until women's contribution to the economy is recognised and valued, any allocations made to address women's positions will be seen as 'soft money' contributing to social consumption and not to growth and economic development.

Non-governmental organisations (NGOs) and academic institutions together with women's movements are increasingly pushing for this recognition because current indices of economic growth and national assets/accounts do not reflect women's contributions.

If this is done, it is more likely that planners will begin to see the importance of supporting women by providing better access to resources, services and benefits to maximise their use of time and resources, thus releasing them from the burden of carrying an unequally heavy responsibility.

### **Use appropriate sex-disaggregated data**

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Sex-disaggregated data and the building-up of an accurate database of gender indices of development is vital to effective planning. India, for example, has been able to develop a national human development report with a human development index and gender development index for each state.

While some of the information/data used may not be totally reliable it does provide a basis on which to build. This type of data is crucial to development planning, especially in ensuring that gender development indices are linked to gender empowerment measures.

## **Analyse the impact of economic structural adjustment programmes**

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Numerous developing countries have recently been through rigorous economic structural adjustment programmes (ESAPs) as part of internal stabilisation and adjustment processes. The International Monetary Fund and World Bank were centrally involved in ESAPs to get countries to meet their debt obligations. However, the social effects of ESAPs – particularly their effects on women – were not factored into the process. The processes used to implement ESAPs were not open, transparent or participatory, and were determined largely by technical experts (economists) engaging in a number-crunching exercise.

ESAPs contributed to increasing poverty among women and a social crisis in terms of health, education, social services and food security in many developing countries. This has led to a distrust of foreign intervention in domestic policy developments. The social costs of economic structural adjustment programmes need to be analysed and measures taken to reverse their negative impact.

## **A critical gender analysis of the root causes of social problems is essential**

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Gender roles, responsibilities and the gender division of labour are seldom analysed within the development planning process. Development planners tend to operate on the assumption that issues of poverty, race, ethnicity, class, and urban/rural disparities should be addressed before gender inequalities. This critical problem arises from the lack of analysis on the extent to which gender inequalities are embedded in other structural inequalities in society. Analyses of poverty and race/ethnicity should include a gender perspective.

The solution to women's problems is usually seen in isolation from all other processes that take place in society and is assumed to rest with women. Most development planning agencies and departments attempt to address gender inequalities by adding women's projects or components onto larger programmes and projects. These approaches are not only technically driven but also do not have a gender analysis. Indeed, often the approach is to factor women into a process which might result in change at the bottom end of the development scale in a welfare response (see Table 1) but which does little to change male/female power relations.

Furthermore, planning agencies and government sectors tend to treat the target population as passive objects or recipients of welfare benefits. In the case of women this view limits the extent to which women become active participants in the project planning processes.

## **Institutional Concerns**

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Planning tends to have a sectoral bias which results in a fragmented, compartmentalised approach and ignores cross-cutting gender needs and concerns. This problem is compounded in many countries where no single authority or agency takes the responsibility for implementing the country's overall development programme. As a result, the failure to meet the needs of women in the different sectors is not evaluated. It may be picked up in gender-aware budget reviews and examinations of the extent to which monies have been used. But without a gender-aware evaluation of the impact on expected beneficiaries, the failure to meet women's needs remains hidden.

### **Integrate strategic gender needs through effective co-ordination of planning cycles**

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Development planning should ensure that there is a link between sectoral budgetary processes and goals and national budgetary processes so that gender objectives can be integrated throughout the process. Currently, most governments' budgetary processes operate independently of sectoral programme planning. This results in programmes being planned without regard to what is financially possible. There is a lack of co-ordination between the various planning cycles in many countries.

The timing and sequencing of planning and implementation processes from the local to the national level is of key importance to the coherence and achievement of development goals. Further, most planners at national levels are more concerned with the ceilings set for public expenditure and budgetary constraints than with the need to develop integrated project plans and the optimal use of resources.

Timing and integration of planning is not just a technical process but requires sensitivity to the need for democratic decision-making, as well as the recognition that bringing women and other marginalised interest groups into planning is essential but takes longer to achieve.

### **Establish structures and mechanisms to advance gender equality/equity**

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Another difficulty within policy and decision-making structures is that promoting a gender perspective is generally left to, or becomes, the concern of a few committed individuals in a department or agency. These individuals often introduce a gender component to their projects and programmes without it being seen as a mainstream task within the entire department or agency. Their ability to provide a gender analysis and gendered policies is dependent on their own frames of reference and the extent to which this can be linked to the practical and strategic needs of women within society. This is a barrier to the institutionalisation of gender. Departments and agencies need to ensure that gender policies are as much a cornerstone of planning as are macro-economic policies and in fact should inform the macroeconomic policy framework.

Establishing effective national mechanisms for advancing gender equality and mainstreaming gender concerns into government planning requires a commitment from governments to undertake public service reform and to work in partnership with civil society organisations. Unless line departments/sectors establish structures and mechanisms to integrate gender into their policies, programmes and objectives, gender inequalities and women's needs are unlikely to be addressed, except in a welfarist, project-specific manner. Gender relations and women's position will continue to be pegged on to existing projects or operate outside of mainstream development planning processes.

The establishment of national mechanisms such as an Office on the Status of Women (as in South Africa) within governments, or a National Council of Women (as in India), needs to go hand-in-hand with civil service reform. Government departments will need to review their staffing, programmes and impact to determine whether these create the space and leverage for advancing gender equality. The Commonwealth is promoting the Gender Management System as a means of creating and maintaining the institutional arrangements required for effective gender mainstreaming.

Independent constitutionally created organs such as a Commission on Gender Equality (as for example in South Africa) will need to monitor the public, private and civil society sectors to ensure that gender equality is promoted. Monitoring all sectors is not realistic, however, unless effective partnerships are developed with key organisations.

### **Recruit women as well as men into the planning field**

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Most departments and agencies have staff with knowledge and expertise related to the sector in which they work but without a gender-aware perspective on their sector. In development planning agencies most staff are usually male, and training is orientated to technical and administrative aspects of work and fits the traditional planning mode. There is a shortage of professional women in the planning sector who have a gender analysis capability. Even in instances where women are present, like their male colleagues, they may not be gender-aware and they may experience difficulties in translating gender interests and needs into planning goals.

Where gender awareness is lacking, those who have decision-making power may be indifferent, resistant or even hostile to gendered development plans. Discussions held with women members of such agencies indicate that many of them experience antagonism and even ridicule in their attempts to address gender inequalities.

Planning agencies and departments need to analyse the roles, rights and responsibilities of women and men in government, and specifically of women, to prevent their exclusion from development planning.

### **Introduce gender policy/planning training into planning agencies**

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Gender inequality is shaped by a specific set of circumstances and derives from particular historical and social contexts and as such emerges in different forms at different periods. Planning must be located within its own social, economic and historical context to be relevant. Training is required to raise awareness of these contexts.

### **Ensure that systems of governance and planning are accountable, transparent and accessible**

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Discussions with policy-makers and technical planners in some Commonwealth countries reflect the need for development planning to be accountable, transparent and accessible. Accountability can be effected within and outside of government. In addition, ways must be found to promote partnerships with civil society to address development needs, particularly of marginalised groups.

### **Promote participant involvement in monitoring and evaluation**

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Research into development planning processes reveals that when planning commissions, units or agencies of government are asked for information on monitoring and evaluation they refer one either to the various sectors or to their annual reports. The sectors indicate considerable difficulty in monitoring and evaluating projects and in determining their gender impact.

Evaluation is usually measured in terms of output, such as in relation to numbers of people who have been served through budget allocations. The effect of programmes and the impact they have had on the extent of the problem – in this case gender inequality – is seldom evaluated.

Projects and programmes will only become culturally relevant and appropriate if the people targeted are a part of the planning process, and inform programme planners about what is culturally acceptable, gender-sensitive and likely to succeed. Poor women's perspectives need to be included in the conceptualisation of plans, as well as their monitoring and evaluation.

## Public and Private Spheres

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Where an attempt is made to improve the position of women, this is usually in the public sphere and does not necessarily result in changes in gender relations within the home.

Power relations in the private sphere are among a number of factors contributing to women's failure to make effective use of changes in the public sphere to advance gender equality. Currently the extent to which development programmes and projects place additional responsibilities on women as 'vehicles' of development (WID and Welfare approaches) places a tremendous burden on them. It is important to create conditions which ensure that the spaces opening up for women to participate more actively at higher levels of decision-making are matched by men taking on more of the work at the household/family and community levels. This can be facilitated through gender-aware primary, secondary, tertiary and continuing education curricula and processes.

Development processes and plans tend to reflect ethnocentric biases about the sexual division of labour at the household, community, provincial and national levels. The potential of development projects in all sectors to change ethnocentric gender stereotyping<sup>2</sup> and result in a qualitative change in male-female relations and access to economic power should be promoted.

### Notes

- 1 Social reproduction means all the tasks women generally carry out in the care of children, the elderly, within the household and in the community and for which they are usually not paid.
- 2 Ethnocentric gender stereotyping refers to gender stereotypes that are specific to particular ethnic, racial or sociocultural groups.

## 4

## Mainstreaming Gender in Planning Cycles

Attempts to mainstream gender into the planning sector should be located within country-specific political and administrative contexts. Gender policy should be integrated into organisational planning instruments such as budget lines, project criteria, operational tools, and day-to-day practice and procedures. The belief system and culture of the organisation will only change if policy is translated into democratic decision-making and a gender supportive work environment.

The leadership, culture and style of an organisation should support gender processes and interpersonal relations of workers. This affects how gender is institutionalised and the opportunities for organisational change. If the leadership and management style discriminates against one gender or is insensitive to gender relations then implementation of policies and projects to address gender inequities will be considerably hindered. The extent to which managers and leaders are able to change their own style and the culture of their organisations will depend on the success of gender training and a performance appraisal system that rewards gender awareness and the attainment of gender-related goals and targets.

### Gender-Aware Policy and Planning

The need for gender-aware policy and planning arises from the demographic composition of populations in which women are the majority, and from the fact that while their contribution to social reproduction and unpaid work is a major contribution to national economies, women continue to have low status and are not afforded opportunities to become part of, or gain benefits from, economic and political systems except at the lower ends. It is for this reason that gender-aware policy and planning become important tools to effect a positive change in women's conditions. Gender-aware policies and plans are more likely to respond to deep-seated patterns of discrimination against women when women themselves collectively analyse and contribute to policy-making and planning processes. In cases where men are not benefiting equally from development planning strategies, a gender-aware approach also enables interventions to correct these imbalances.

- ◆ Policy-making is the process of social and political decision-making about how to allocate resources for the needs and interests of society which ends in a policy strategy.
- ◆ Planning is the process of implementation of the policy, with the end result being a clear plan.
- ◆ Implementation is the process of taking action to deliver the programme designed, often resulting in a completed product (Moser, 1993: 6).

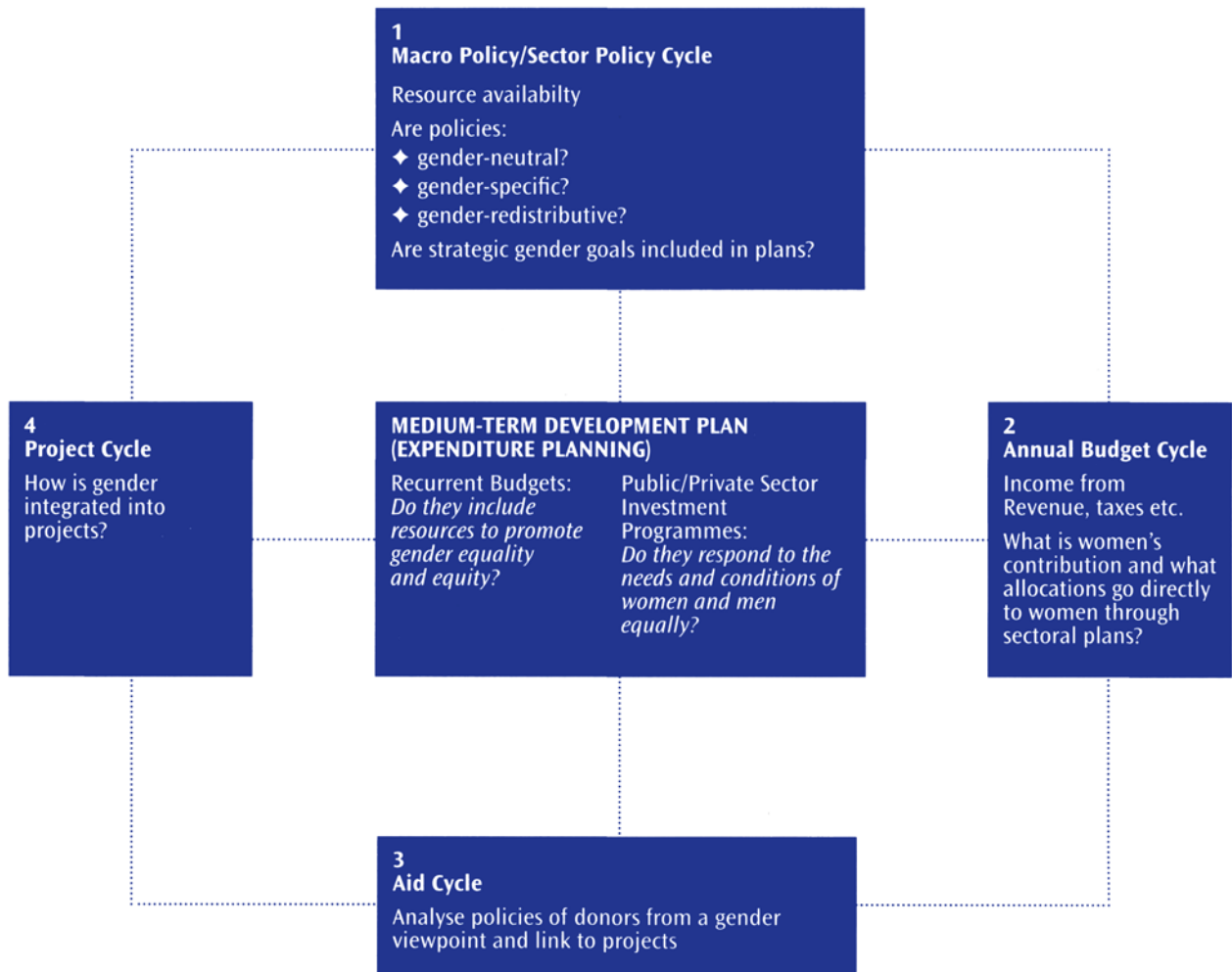
These three processes, according to Moser, can be used to describe the interrelated stages of gender policy. Since the gap between gender-aware policy and planning is significant in planning agencies it is an area that needs to be addressed.

The absence of a clearly established gender policy has been identified as a major problem in development planning. The following paragraphs show how gender can be integrated into the major policy and planning cycles of government.

## The Four Major Planning Cycles

There are usually four major planning cycles through which most developing countries seek to respond to national needs and issues. These are: the macro/sectoral policy cycle, the budget cycle, the aid cycle and the project cycles (see Figure 1). These cycles when brought together through a planning process usually reflect a government's medium-term (5-10 year period) expenditure plan, as in Figure 2. The inclusion of a gender perspective throughout all four planning cycles (Figure 1) and in the different stages of each will strengthen the possibility of change from gender-blind to gender-aware policies, plans and programmes within institutions and will act as an internal guide for changes in the macro process illustrated in Figure 2.

Figure 1 The Four Planning Cycles and the Medium-Term Development Plan



## The macro and sector policy cycles and the medium-term development plan

In establishing macro policy frameworks, gender analysis and outputs need to be included to ensure effective policies which address the needs of all sectors of the population. Approaches to policy-making which influence gender outcomes can be categorised into three types: gender-neutral, gender-specific and gender-aware/redistributive/transformational (Kabeer, 1994: 80-97).

- ◆ **Gender-neutral policies** are those that are seen as having no significant gender dimension. However, government policies seldom if ever have the same effect on women as they do on men, even if at first sight they may appear to exist in a context where gender is irrelevant. In order to determine that a policy is genuinely gender-neutral, it is necessary to have complete and accurate information about the gender-based division of resources and responsibilities relating to the policy. Otherwise, policies which may appear to be gender-neutral may in fact be gender-blind, and biased in favour of males because they presuppose that those involved in and affected by the policy are males, with male needs and interests. *Example:* a policy to extend credit to small enterprises which does not address the constraints women face in obtaining such credit.
- ◆ **Gender-specific policies** take into account gender differentials, and target women or men specifically, but leave the current distribution of resources and responsibilities intact. *Example:* a micro-credit scheme that targets women.
- ◆ **Gender-aware/redistributive/transformational policies:** These are aimed at transforming existing gender relations to achieve democracy by redistributing the division of resources, responsibilities and power between women and men more evenly. This policy approach is politically challenging since it seeks to redirect resources to women and requires men to give up certain privileges while taking on responsibilities which result in equity in development outcomes. But they also go the furthest towards addressing not only practical gender needs but also strategic gender interests (adapted from Kabeer, 1994).

Gender planning places particular attention on the unequal relations between men and women in development, and on how to address the needs of women. In the broader process of development planning it means that gender issues are recognised in the identification of the problems or needs, incorporated into the development goals and objectives and gender-aware policies, right through to implementation.

Generally policy and programme interventions could fall within a welfare, equity or transformation/empowerment approach. A welfare approach usually responds to meeting the practical needs of women, whereas a transformational approach responds to meeting strategic needs.

### A participatory process

The potential of gender policy to transform gender relations and the gender-biased distribution of resources is greatly enhanced if that policy is developed through a participatory process involving key decision-makers within the department concerned and in other related sectors, as well as with the groups and communities the policy is intended to benefit. A gender policy formulated through such a participatory process is far more likely to gain wide-ranging acceptance, and sufficient commitment to its implementation for the attainment of its goals.

Gender policies and planning must ensure that poor women do not become a target for experiments or the dumping ground for technically conceived plans that do not respond to their specific needs. Experience has shown that when such experiments or plans do not produce the desired result, planners and donors tend to perceive the problem to be the apathy of poor women rather than ill-conceived project designs that have not involved such women from the beginning.

Figure 2

### Main Stages in Preparing a Gender-Aware Medium-Term Development Plan (MTDP)

- 1 Approval by Cabinet of initial approach and timetable for Development Planning Process. The need for promoting gender equality through the MTDP should be explicitly stated.
- 2 Preparation of initial macro framework: Using available sex-disaggregated data to assess recent performance and current status of the economy and social development in the country, prospects for the medium and longer term, and their implications for Government expenditure targets. This is viewed against social needs and pressure points that could cause political and economic turbulence. Gender status and analysis is critical in this framework, which should be developed in close consultation with NGOs, other civil society partners and the private sector.
- 3 Macro Issues Paper to be considered by Cabinet: A short paper to:
  - ◆ brief Cabinet (and senior officials) on the economic and social situation, and the comparative position of women and men;
  - ◆ present alternative scenarios for the country's economic performance over the MTDP, with corresponding scenarios for public expenditure to address gender inequality;
  - ◆ identify main macroeconomic and sector policy issues that the next MTDP needs to address. Mainstream strategic gender interests into these or prepare a paper on Gender and the Macro Framework.

Cabinet reactions to the macro issues paper are reflected in drafting gender-sensitive guidelines for sector papers.
- 4 Sector Issues Papers to be considered by Cabinet: To be prepared by the sector concerned including women's/gender sector. Papers should be very short, alerting Cabinet to the main sector issues and impact on gender relations and gender inequalities and the important trade-offs that must be considered.
- 5 Detailed Macro Framework Paper with expenditure guidelines: In the light of reactions to the initial macro paper and to the sector issues' papers, Cabinet is presented with a detailed macroeconomic and development paper which proposes overall economic and public expenditure projections for the MTDP period and also proposes a sectoral allocation of resources to serve as the framework for drafting of sectoral chapters and expenditure proposals for the MTDP. This paper should include a gender focus – addressing inequalities and promoting gendered planning in respect of resource allocations.
- 6 Preparation of draft chapters, expenditure proposals and proposed projects: Drafts to be prepared initially by the sector ministries. Development planning departments/agencies should assess objectives in terms of mainstreaming gender into all plans, policies and outcomes and refer back to sectors if gender analysis is missing.
- 7 Review of draft chapters, preparation of consolidated expenditure programmes: Co-ordination between central resource agencies (Planning, Finance, Personnel) in reviewing sector proposals and preparing consolidated expenditure programme. Expenditure programme and review process to be co-ordinated with annual budget preparation. Ensure that tools are built in at this stage to monitor and evaluate the impact of the programmes in promoting gender equality and equity.
- 8 Approval of full draft by Cabinet: Overall editing by planning agency and submission of full draft to Cabinet for final approval. Prioritise gender, class, race/ethnicity as criteria to assess relevance of proposals. Cabinet to have a set of guidelines to measure proposals within criteria.
- 9 Presentation to Parliament: MTDP submitted to Parliament for full debate and approval. Parliament to understand the criteria (gender, race/ethnicity, income inequalities) and guidelines used to approve policy/plan.

Policy planning that is engendered should ensure the following:

- ◆ clear goals and guidelines related to gender and development;
- ◆ consistency with the organisational goal of transformation of gender relations and employment equity;
- ◆ consultation at all levels and collective ownership of policy goals;
- ◆ baseline sex-disaggregated information;
- ◆ clearly outlined regional and national co-ordination functions and communication channels; and
- ◆ gender-specific evaluation and monitoring criteria; and external evaluation at, and between, different levels of performance.

### *The medium-term development plan*

Figure 2 shows the main stages in the preparation of a gender-aware medium-term development plan. It shows how the 'engendered' inputs from the macro and sectoral policy planning cycles can be combined to produce a medium-term plan of expenditure which then informs the preparation of annual budget expenditures. These then feed into the project cycles in the various sectors.

### **The annual budget cycle**

The general procedure in countries is one in which different government departments draw up their sectoral budget requirements in a 'year-on-year' basis and then go through a process of lobbying and negotiating with their Finance Ministries to secure the funds to implement departmental programmes. Most departments work hard to justify existing expenditure patterns and projections for the next year since they have a vested interest in these and do not introduce major changes or new priority areas. Links need to be strengthened between the goal of planned change with regard to gender inequalities and decisions made on annual public allocations to departments.

The annual budget cycle needs to be engendered because the budget is the key policy instrument through which resources are allocated to departments to promote development. Annual budget cycles should include criteria to measure how the budget responds to race, gender, caste/class and other disparities, and should be drawn up as the end result of a process of negotiations representing all interests. Clearly, budget outcomes and allocations, especially related to the promotion of equality, should be an indication of women's interests and needs.

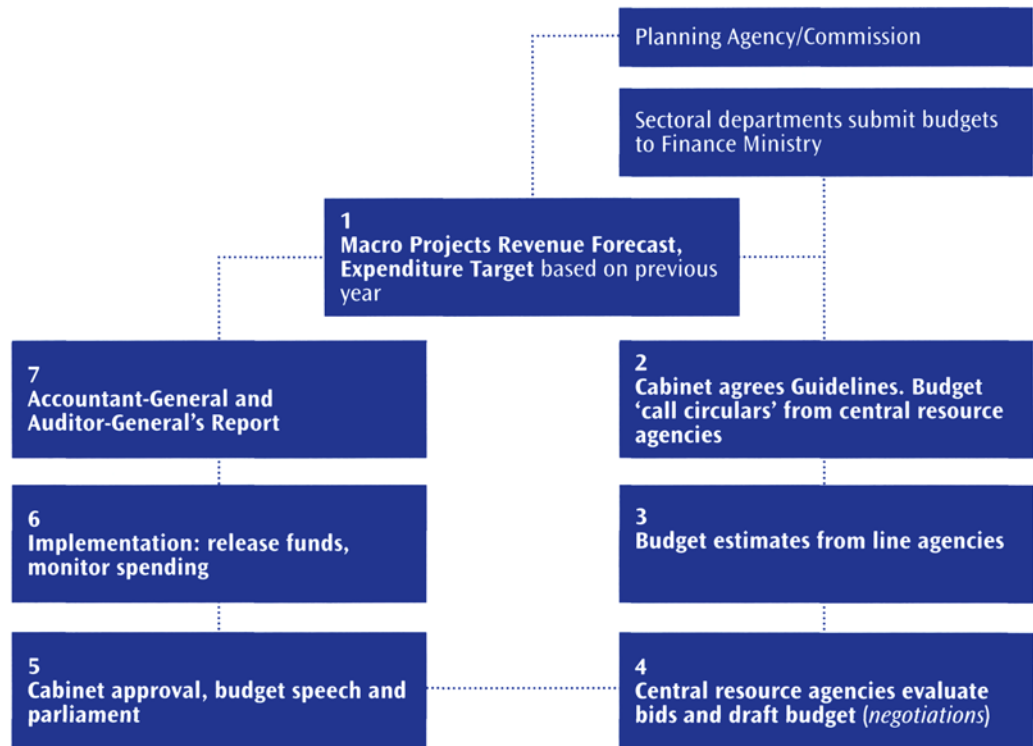
'Gendered' allocations should be determined through a consultative procedure led by gender-aware officers. Parliamentary or political lobbying can influence government's responsiveness to such a process. The sectoral departments and Finance Ministries should negotiate budget priorities with reference to the government planning agency. In countries where there are planning commissions or units, these agencies have the potential to play a key role in ensuring budgetary allocations towards gender equity.

Australia and Canada have developed a Women's Budget to raise gender awareness within the budget process and identify the manner in which women's needs and interests are 'missing' in the National Budget. South African women have started a pilot Budget Project along similar lines.

The Commonwealth Secretariat is developing a series of policy options for integrating gender into national budgetary policies in the context of economic reform. The policy options, which by late 1998 were being pilot tested in South Africa and Sri Lanka, centre on a range of possible tools which governments may adapt to their specific circumstances (see Section 5, Tools for Gender Mainstreaming in Development Planning).

Figure 3 shows the basic stages of the annual budget cycle.

Figure 3 **The Annual Budget Cycle**



Source: Taylor (1996)

Concrete steps towards gendering each stage of the process are as follows:

- ◆ **Stage 1** is an outcome of the macro policy process in Figure 2. These projections and targets should include a gender analysis showing how practical and strategic gender needs are addressed.
- ◆ **Stage 2:** Ceilings should be set within which programmes targeting women or gender are reflected. Such programmes should not be 'added on' through donor aid and grants only but become a part of departments' normal work.
- ◆ **Stage 3:** Estimates for departmental programmes should be drawn up with a gender perspective.
- ◆ **Stage 4:** Budgets should be evaluated in terms of meeting both overall budget/debt targets and gender objectives.
- ◆ **Stage 5:** The budget speech should reflect line departments' gender priorities.
- ◆ **Stage 6** has been found to be one of the major obstacles to effective planning. Efforts should be made to decrease the time lapse between Cabinet approval [5] of sectoral budgets and release of funds [6].
- ◆ **Stage 7:** Accounting systems leading to this stage should be thorough and gender-aware. Government systems should be designed to ensure a reallocation of resources and a monitoring of the use of expenses. At this stage an analysis is made of the use of government money within global allocations.

### The aid cycle

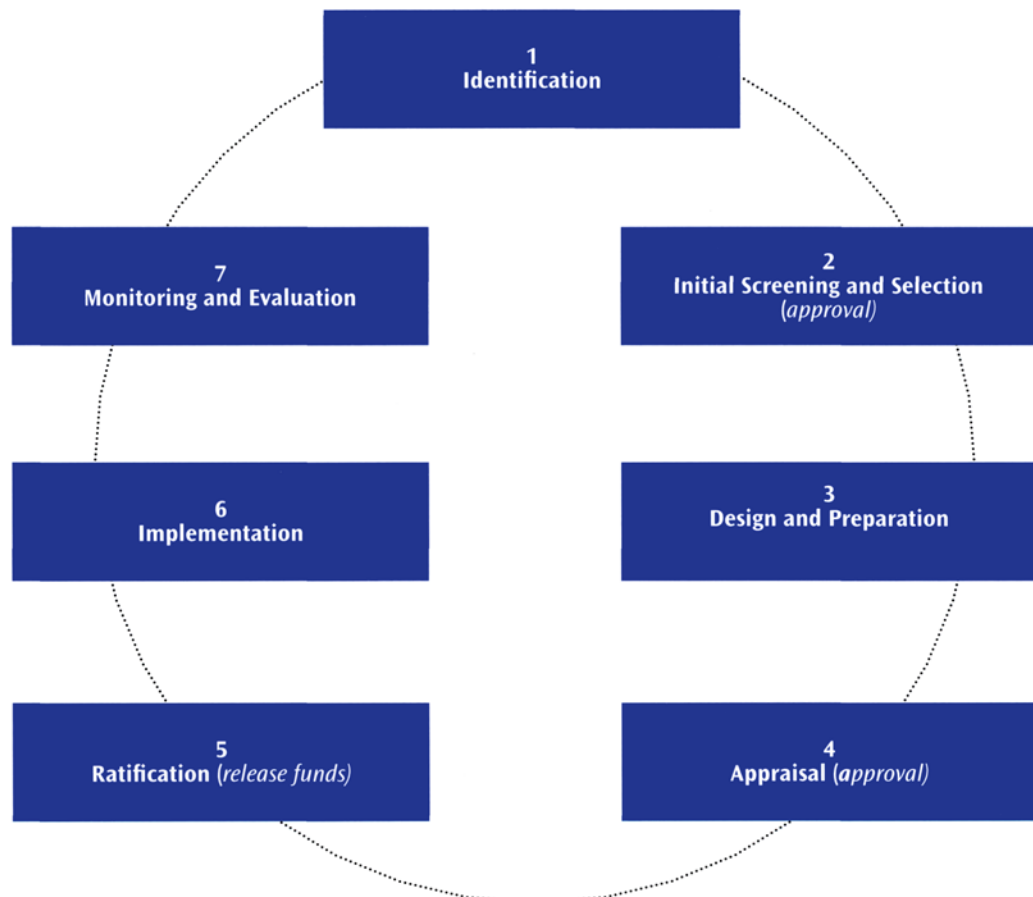
Development goals and planning priorities are usually determined through a political process and negotiated on the basis of many factors which do not always include the needs or concerns of the majority of people and often excludes women. One of these factors is that plan implementation depends not only on national budget priorities and allocations but also on donor aid.

The relationship that donor organisations have with the government and non-governmental sectors is complex. A critical aspect of this relationship is the type of bilateral agreement made between governments and international agencies, which can lead to donors prescribing inappropriate policy and development directions. Governments' capacity to utilise donor aid in accordance with the implementation and delivery schedule is also limited. This results in a lag in the delivery of services on the ground because of the restructuring required within government and civil society organisations to utilise such aid.

A further complication is that donors, be they inter-governmental organisations, bilateral governmental agencies or non-governmental organisations, have their own development agendas, reflect their own interests and have conditions that often do not converge with the recipient country's priorities. The political aspects of development aid and countries' dependency on aid in the form of finance, knowledge and technology need to be examined in terms of their impact on the material and cultural aspects of women's and men's lives.

## The project cycle

Figure 4 **The Project Cycle**



Source: Taylor (1996)

The project cycle describes the process whereby projects are chosen, designed, implemented and evaluated as a technical process, as shown in Figure 4.

Mainstreaming gender at the project level has the limitation that while projects may address specific, practical, gender needs of women, they are unlikely to address the broader strategic gender interests which will ensure the transformation of unequal gender relations in society.

The project cycle may be engendered using the checklist of current interventions indicated in Table 3 to respond to practical gender needs. These interventions are more likely to facilitate systemic change if clear linkages are established between organisations and departments and within and outside of government to promote gender planning across sectors and interests.

Table 3 Checklist of Interventions to 'Engender' the Project Cycle

	Stage	Important Interventions
1	<b>Identification</b>	<ul style="list-style-type: none"> <li>◆ policy direction</li> <li>◆ targeted or mainstream intervention</li> </ul>
2	<b>Initial Screening and Selection</b> (a) definition of target group (b) identification of gender objectives	<ul style="list-style-type: none"> <li>◆ gender diagnosis</li> <li>◆ gender roles identification</li> <li>◆ gender needs assessment</li> </ul>
3	<b>Design and Preparation</b> (a) personnel (b) socioeconomic feasibility studies	<ul style="list-style-type: none"> <li>◆ staff gender training</li> <li>◆ gendered terms of reference for staff consultants</li> <li>◆ mechanisms to ensure women and gender-aware organisations are included in planning process</li> <li>◆ gender needs assessment</li> <li>◆ gender-disaggregated data on allocation and control of resources</li> </ul>
4	<b>Appraisal</b> (a) mission personnel (b) appraisal studies	<ul style="list-style-type: none"> <li>◆ gendered terms of reference for consultants</li> <li>◆ inclusion of gender expert</li> <li>◆ staff gender training</li> <li>◆ gendered cost-benefit analysis to include women's 'invisible work' i.e., the unpaid work they do as part of their reproductive role</li> <li>◆ inclusion of women in staff gender training</li> </ul>
5	<b>Ratification</b>	<ul style="list-style-type: none"> <li>◆ entry point for gender dialogue</li> <li>◆ staff gender-awareness training</li> </ul>
6	<b>Implementation</b> (a) agency and staff (b) target population	<ul style="list-style-type: none"> <li>◆ staff gender planning training</li> <li>◆ gendered terms of reference for staff</li> <li>◆ gendered composition of agency</li> <li>◆ clarification of women's role in participatory projects</li> </ul>
7	<b>Monitoring/Evaluation</b>	<ul style="list-style-type: none"> <li>◆ gendered terms of reference for consultants</li> <li>◆ staff gender training</li> <li>◆ team composition</li> </ul>

Source: Moser (1993: 157), based on Antrobus's guidelines (1989: 13-16)

## 5

## Tools for Gender Mainstreaming in Development Planning

### Using Gender-Sensitive Indicators

Access to relevant sex-disaggregated data has been identified as an important element in mainstreaming gender into development planning. The GMS series of publications includes a detailed guide to the use of gender-sensitive indicators, which may be of use to Commonwealth governments in this regard (for details of this publication, see Beck, 1999).

*“An indicator is an item of data that summarises a large amount of information in a single figure, in such a way as to give an indication of change over time, and in comparison to a norm. Indicators differ from statistics in that, rather than merely presenting facts, indicators involve comparison to a norm in their interpretation. A gender-sensitive indicator can be defined as an indicator that captures gender-related changes in society over time.”*

Beck, 1999

Thus an example of a *gender statistic* would be: “60% of women in country X are literate”. An example of a *gender-sensitive indicator* would be: “60% of women in country X are literate, as compared to 82% of men, and compared to 30% and 52% five years ago” (Beck, 1999).

Gender-sensitive indicators are potentially of great usefulness in integrating gender considerations into development planning. However, it should be recognised that there are limitations on the amount and type of information they can provide, and that care needs to be taken in their interpretation.

*“The greatest limitation of gender-sensitive indicators is that they do not provide information on wider social patterns: they will usually tell the analyst little about why gender relations have been shaped in a particular way and how these relations can be changed. They point to key questions rather than providing answers. Indicator systems should therefore be complemented by gender analysis, which involves examining, often at a micro-level, the social relations between women and men, and the structural features of society which reinforce gender inequality.”*

Beck, 1999

The indicators examined in the publication fall into ten main categories:

- 1 Population composition and change
- 2 Human settlements and geographical distribution
- 3 Households and families, marital status, fertility
- 4 Learning within and outside the formal education system
- 5 Health, health services, disability, nutrition
- 6 Economic activity and labour force participation
- 7 Access to land, equipment and credit

- 8 Legal rights and political power
- 9 Violence against women
- 10 Gender and macroeconomics

Table 4 shows some basic macroeconomic indicators, along with pertinent gender-related questions, which could be useful in providing a gender perspective on macroeconomic policies and plans.

Table 4 **Gender and Macroeconomics**

Indicator	Indicator Questions
1 Private consumption expenditure of households	<ul style="list-style-type: none"> <li>◆ How much of the household's expenditure is directed towards the purchase of food, education and health related matters?</li> <li>◆ Who controls the household budget, and what say do women have in expenditure?</li> </ul>
2 Total government expenditure and as percentage of GDP	<ul style="list-style-type: none"> <li>◆ How far is government expenditure directed towards promoting gender equality and equity?</li> </ul>
3 Breakdown of government expenditure by sector	<ul style="list-style-type: none"> <li>◆ Do women and men have an equal role in national level budgetary planning?</li> <li>◆ What percentage of total government expenditure is allocated to health and education?</li> </ul>
4 Proportion of persons and households at risk covered by social security and similar schemes	<ul style="list-style-type: none"> <li>◆ Have health and education suffered budget cuts under structural adjustment programmes? How have such cuts affected efforts to advance gender equality and equity?</li> </ul>
5 Proportion of potentially eligible persons and households receiving social insurance, social assistance and similar benefits	<ul style="list-style-type: none"> <li>◆ Are women and men equally covered by social security and other schemes? Are such schemes sufficiently gender-sensitive? Is sufficient attention being paid during national level budgetary planning to groups at risk, such as poor single mothers and female heads of households?</li> </ul>

Source: Beck (1999)

## Tools for Gender Integration into Macroeconomic Policy

The policy options developed by the Commonwealth Secretariat for integrating gender into national budgetary policies in the context of economic reform<sup>1</sup> centre on six possible tools:

- ◆ **sex-disaggregated beneficiary assessments** – a research technique whereby groups of women are asked how, if they were the Finance Minister, they would slice the national budgetary pie; the results are compared with the existing budget to see how closely it reflects women's priorities;
- ◆ **sex-disaggregated public expenditure incidence analysis** – this involves analysing public expenditures in such areas as health, education and agriculture to see how such expenditures benefit women and men, girls and boys to differing degrees;
- ◆ **gender-aware policy evaluation of public expenditure** – evaluating the policy assumptions that underlie budgetary appropriations, to identify their likely impact on current patterns and degrees of gender differences;
- ◆ **gender-aware budget statement** – a modification of the Women's Budget; this is a statement from each sectoral ministry or line department on the gender implications of the budget within that sector;
- ◆ **sex-disaggregated analysis of the impact of the budget on time use** – this looks at the relationship between the national budget and the way time is used in households, so as to reveal the macroeconomic implications of unpaid work such

as caring for the family, the sick and community members, collecting fuel and water, cooking, cleaning, teaching children and so on; and

- ◆ **gender-aware medium-term economic policy framework** – medium-term macroeconomic policy frameworks are currently formulated using a variety of economy-wide models which are gender-blind. Approaches for integrating gender could include: disaggregating variables by gender where applicable; introducing new variables incorporating a gender perspective; constructing new models that incorporate both national income accounts and household income accounts reflecting unpaid work; and changing underlying assumptions about the social and institutional set-up for economic planning.

### Notes

- 1 The policy options are described in greater detail in the GMS publication *Gender Mainstreaming in Finance: A Reference Manual for Governments and Other Stakeholders* (Sen, 1999).

## 6

## Two Commonwealth Approaches to Gender Equality

This section looks at some general indicators on the situation of women in two Commonwealth countries, India and South Africa, and efforts by governments to advance gender equality in those countries. It also develops a typology of these countries' planning responses to gender.

### Engendering Development Planning In Post-Apartheid South Africa<sup>1</sup>

The interim constitution of South Africa specifically includes a clause on equality and the promotion of gender equality as a key objective of the South African state. The government is beginning to fulfil this objective through the establishment of a Gender Commission, locating specific gender units/structures in government departments to ensure that all levels of the public sector integrate needs and interests of women in their programmes and projects.<sup>2</sup> The South African Government and Parliament has made many policy recommendations and taken specific initiatives to address the needs and interests of women, including the ratification of the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW).

In the post-Beijing period to date, most national government departments have committed themselves to a range of steps to enhance the status of women in South Africa. Many of the post-Beijing initiatives were led by the Ministry of Social Welfare and the former RDP office. In Gauteng, the GPSC has led the initiative with the sub-commission of the provincial legislature and an intergovernmental forum. These initiatives have raised a critical awareness of gender needs and interests among a few government departments and civil society organisations. However, the key concern is that unless Development Planning Departments recognise the need to integrate gender into planning processes, these initiatives will be lost.

Consequently, efforts must be made to ensure that the needs and interests of women in the struggle for gender equality will respond to the particular context of women highlighted below:

- ◆ At least 35 per cent of households in South Africa are headed by women alone.
- ◆ Woman-headed households are poorer than others, the income being approximately half.
- ◆ Over half of the unemployed in South Africa are women.
- ◆ Women live in extreme poverty in rural areas and are burdened by multiple roles.
- ◆ 13 per cent of rural households have water and most do not have electricity. Women's time is taken up by fetching wood for fuel and water.
- ◆ The illiteracy rates for rural areas where women are in the majority is approximately 50 per cent, and 38 per cent in urban areas.
- ◆ Training and human resource development for women is limited to traditional female occupations.

- ◆ Women's rights and control over reproduction is still an issue, with 300,000 unsafe abortions taking place each year.
- ◆ All forms of violence against women and children are on the increase. In 1993 there were about 966,000 rapes; one woman is raped nearly every minute in South Africa.
- ◆ Women are not recognised, not empowered and not seen as significant in the productive sectors of the economy in South Africa.<sup>3</sup>

Since 1994 women have been elected into the national Parliament, provincial legislatures and more recently local government structures. Their representation at national level is just over 30 per cent, with more women in Cabinet than ever before, but this representation is not matched by their qualitative participation in decision-making (Taylor, 1996).

### The importance of effective co-ordination

In South Africa, the government was not able to utilise donor aid and government allocations set aside for its reconstruction and development programme (RDP). There was a carryover of R7 billion from donor aid into 1995 and it was estimated that there would be a carryover of over R10 billion from the 1996 budget to the 1997/8 budget. The RDP was designed as a comprehensive programme to address poverty, reduce inequalities as a result of apartheid, restructure the economy, reform the civil service and build human resources among others. The RDP process took place as a separate initiative led by democratic forces while the Annual Budgetary and Planning Process took place within the civil service.

The logic of the RDP was neither understood nor immediately accommodated within sectors, and the planning agency (RDP office – subsequently dismantled) did not co-ordinate and synchronise all cycles. There was a time lag in allocating monies to the programmes identified and a build up of unallocated money in government departments. Poverty increased in spread and intensity, women's positions worsened and pressure on the government to deliver led to the disbursement of funds to projects that were poorly conceived and implemented.

In order to advance gender equality in South Africa and integrate gender into government, the report on the status of women in Gauteng emphasises the following national and provincial priorities:

- ◆ The integration of a gendered analysis into all policies, programmes, structures and processes is central to the achievement of gender equality.
- ◆ A gendered analysis of the macroeconomic framework, the budgetary processes and allocations and the need to ensure that these documents are open to public scrutiny, and that competing interests and claims are mediated through a process that is inclusive of all concerned, is critical.
- ◆ That a structure or unit be established, tasked with the responsibility of developing gender plans with clear objectives and priorities to ensure the mainstreaming of gender into all government departments, especially that of development planning by:
  - reviewing existing policies and laws;
  - ensuring that all new policies are formulated within a gender analysis;
  - developing and implementing relevant legislation to advance the status of women;
  - developing a system of indicators and reports by all departments on the gender impact of their policies and budgets;
  - reforming economic planning systems to factor in women's contributions and needs;
  - institutionalising gender education and training strategy for government sectors to develop skills in gender planning, policy development and implementation;

- participating in the government's information systems to ensure the flow of gender information within government and between government and civil society;
- encouraging the active involvement of the public, private and voluntary sectors in partnership with government to attain equality between men and women; and
- promoting the establishment of data collection and analysis which will be gender-disaggregated and accurate.

## Karnataka and National Government of India

### India: Some indicators on women<sup>4</sup>

- ◆ A third of all households are solely maintained by women.
- ◆ A third of women provide 50 per cent of all earnings in India.
- ◆ 94 per cent of all women work in unorganised sectors such as agriculture.
- ◆ A girl child labours 10 hours a day for 315 days of a year.
- ◆ The sex ratio has steadily been declining over the decade censuses and has come down to 927 females per 1000 males in 1991.
- ◆ Expectation of life at birth has risen from 49.0 years during 1970-75 to 59.7 years for women by 1989-93, exceeding the expectation of life for males at 59.0 years.
- ◆ The total fertility rate has declined to 3.5 in 1993.
- ◆ Literacy levels of females have risen significantly from 29.85 in 1981 to 39.19 in 1991, while the literacy rate for males has advanced to 64.13 from 56.37.
- ◆ Gross enrolment ratios for girls at the three stages of school education have risen rapidly in the last decade from 64.1, 28.6 and 52.1 to 93.3, 55.0 and 79.3 respectively in 1995-96.
- ◆ The percentage of girls in school enrolment has also gone up at all three stages, from 38.6, 32.9 and 29.6 in 1980-81 to 43.2, 39.0 and 35.3 in 1995-96, respectively.
- ◆ Dropout rates for girls have fallen at primary and middle stages from 62.5 and 79.4 in 1980-81 to 37.8 and 56.5 respectively in 1994-95, but are still high at the middle and high school stages.
- ◆ Women's participation in literacy campaigns has been higher than that of men.
- ◆ Work participation rates for women have risen by 2 to 3 percentage points in 1991 as compared to 1981, as seen from census data.
- ◆ The percentage of women in the organised sector rose from 14.38 in 1992 to 15.36 in 1995.

Table 5

### A Typology of Development Planning in Practice: Some Features in India and South Africa

Country/State	Policy Approach	Role of the State	Development Approach	Macro-Economic Framework
India – National	Ranges from welfarist to anti-poverty. Limited role. Only acts when there is extreme pressure. Then promotes an incremental, piecemeal response to address symptoms through sectors.	Based on promoting accelerated economic growth through industrialisation. Limited emphasis on building human resources except in respect of skills for the market.	Modernising the economy through industrialisation and 'trickle down' effect. Emphasis on rapid economic growth through medium/micro enterprise and transnational companies.	Liberalising economy opening. Emphasis on reducing deficits, cutting back on public expenditure, especially on social services. Repayment of debt and servicing. Women seen as dependants.

- ◆ The percentage of women in central government has risen from 3.64 in 1981 to 7.58 in 1991.
- ◆ In the area of social defence, the data reveal an increasing trend of crime against women. The percentage of crime against women out of total crime has risen from 4.3 per cent in 1990 to 5.6 per cent in 1994.

The national government has constituted a State Commission for women which will examine how far the legal, political and economic rights granted to women under the Indian Constitution are actually accessed by women. The Government of the State of Karnataka has also reserved 30 per cent of the posts in all government services for women. The process of 'engendering' government processes is said to have started in this State at the grassroots level with the village, sub-district and district level electing bodies (panchayats) where 30 per cent of the members, several chairpersons and Deputy Chairpersons of these bodies are women.

At the national level, the Central Government proposes to reserve 30 per cent of the seats in Parliament and State Legislature for women. Mere engendering is not enough in societies where men have traditionally exercised political, administrative and economic power. So the Department of Women and Child Development has taken up a massive training programme for the empowerment of women in local bodies.<sup>5</sup>

## A Typology of Two Governments' Planning Responses to Gender

Most countries have an uneven response to gender which cannot be located within a specific policy approach such as welfare (see Table 1). A typology has been attempted for India and South Africa (see Table 5), which are seeking to address strategic and practical needs of women. The land, agriculture and rural development sectors in these governments tend to push strategic concerns related to land reform, redistribution, credit and loan facilities etc., while welfare departments respond to practical needs. In addition, each country is at a different development stage derived from a specific set of historical/cultural experiences so a typology approach is difficult.

The usefulness of attempting a typology approach in the development planning sector is that it highlights the links between policy, planning and national plans and the disjunction between macro policy and lack of changes in the position of women. It

Institutionalisation of Gender into Planning Framework	Distribution of Funds/Resources	Adequacy of Planning Data	Development Practice Regarding Gender	Women's Political and Economic Participation	Impact on Reducing Gender Inequalities
None except through Dept. of Women and Child Development, monitored by National Women's Commission, Rural Development Ministry. Govt. depts. have few women in planning sector. Staff need gender training.	Decrease in public funds allocated to women's projects and anti-poverty programmes. Credit schemes through national bank for Agricultural and Rural Development.	Adequate central statistical bureau collating sex-disaggregated data for planning. Academics research gender trends and a Gender Development Index and Human Development Index exist for each state.	Limited/no gender analysis in government planning departments. Women seen as vehicles of development with the exception of rural development sector and human resource development.	Impact at higher levels beginning to be felt in government. Caste and gender still a factor in hierarchy of decision-making. Inter and intra household levels remain oppressive. Some practical needs met, but not strategic needs.	Limited participation in central and state level political/economic structures. Increasing role across caste and gender through Panchayati Raj (Local Government) Constitutional amendment resulting in 30% reservation of seats for scheduled classes and women.

Table 5 continued

## A Typology of Development Planning in Practice: Some Features in India and South Africa

Country/State	Policy Approach	Role of the State	Development Approach	Macro-Economic Framework
State Karnataka	Promotes the thinking that helping poor women will increase their productivity and promote economic growth. Poverty is seen as the problem due to under-development – not unequal power relations. Also retains welfare approach.	Mix between social market and economic market emphasis. Intervenes to a limited extent. Role seen only as co-ordination through nation-wide anti-poverty campaigns.	As above but does pursue efforts to promote small business and rural economy. Handicraft co-operatives struggle to survive.	As above.
South Africa National	Anti-poverty in planning, but policy rhetoric is of empowerment and economic development.	Emphasis on economic market. Reduced state intervention. Attempt to build social accord with business, labour and civil society. Limited gains for workers.	Economic growth model. Neglect of rural economy. Modernising economy and promoting small-scale businesses and income generating products. Emphasis on employing women in certain sectors such as the service industry/crafts.	Liberalisation. Emphasis on reducing deficits, cutting back on public expenditure, especially on social services. Repayment of debt and servicing. Women seen as dependants.
Province Gauteng	Anti-poverty efficiency but policy rhetoric is of development and empowerment.	Ambivalent partnership approach but practice is freeing up the markets.	As above.	As above but emerging tensions between labour, business, government and political movements.

further highlights that development planning agencies have remained outside of the gender concerns and are in the main unaware of the need to mainstream gender into planning. Most countries' responses vary between a welfare and an anti-poverty approach in practice, although the rhetoric is of equity and transformation.

Institutionalisation of Gender into Planning Framework	Distribution of Funds/Resources	Adequacy of Planning Data	Development Practice Regarding Gender	Women's Political and Economic Participation	Impact on Reducing Gender Inequalities
As above. The existence of strong pressure groups has not led to any significant institutionalisation.	As above.	Adequate – as above.	Poor – as above.	As above except greater emphasis on human resource development and training of women.	As above but stronger and larger presence of women at top levels. Effects of greater numbers of women in local governments still has to be felt.
Through women's desks in National Departments/Gender Commission. Gender not integrated into planning because planning processes are in process of being restructured.	Limited public sector funds. Funding through loans and grants available for anti-poverty programmes. Donor and private-sector support provided for small income-generating projects. Lag in distribution of funds.	Inadequate conventional socio-economic indices available. No proper census done. Apartheid legacy. Gender audit and data collection beginning.	Positive in respect of broader equity (class, race, ethnicity, disability) but practice is non-existent in terms of gender except through such sectors as water, forestry and land, where the response is welfarist.	Limited policy level changes have resulted in more women in government and national parliament, but intra household, community and social inequalities remain. Representation of women has not resulted in gendered participation. Gender awareness increasing.	Greater participation of women in national Parliament (+25%) and in senior levels of government and business sector but at lower levels and rural areas increasing powerlessness.
In progress, but there is the option of gender units in departments. Intergovernmental forum and provincial service commission active. Planning department nationally.	As above, through aid and grants from national government. Lag in distribution of funds.	Inadequate data for planning. Gender data being collated but not yet used in planning systems.	As above. Except for emphasis to correct imbalance through efforts of Gauteng Provincial Service Commission and women's interest groupings.	Minimal. Women are more visible, but inequalities remain. Gender awareness increases but structural inequalities remain. Apartheid legacy stronger factor.	Elites benefit in economic and political spheres – greater numbers of women in professional sectors (+50% white). Increasing gaps between top and lower levels – women alienated in informal/squatter settlements.

### Notes

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## Appendix Glossary of terms

### Development

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Development as a concept and process is defined in many ways depending on who uses it and for what purpose. In this manual, development is understood as economic and social activities, the basic objective of which is to enlarge people's choices by providing equality of opportunity for all people in society, sustaining such opportunities from one generation to the next and empowering people so that they participate in, and benefit from development processes (UNDP, 1995: 1). This definition means that development is not only measured according to economic indicators such as gross national product but also according to health (life expectancy) and education (literacy and enrolment).

### Development planning

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"Planning can be defined as a conscious effort on the part of any government to follow a definite pattern of economical development in order to promote rapid and fundamental change in the economy and society" (Waterston, 1982: 23). Development planning is the process through which economic development is planned. Many countries, irrespective of their political ideology, use the process of development planning to achieve national goals.

### Gender

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Gender is a term used to refer to the socially constructed characteristics that define and relate to male and female ways of being and behaviour within specific contexts. Gender also refers to the web of cultural symbols, normative concepts, institutional structures and internalised self-images which, through a process of social construction, define masculine and feminine roles and articulate these roles within power relationships.

### Gender diagnosis

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Gender diagnosis refers to the gender analysis of various indicators, including economic status, employment/unemployment patterns, participation in decision-making, and health, education and other sectoral indicators to determine the specific nature of the gender situation in a given country/society/organisation, so that appropriate remedial interventions can be designed.

### Gender division of labour

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The term 'gender division of labour' refers to the fact that generally women and men are allotted different work roles. These work roles are deeply discriminatory since women tend to be confined to menial, low-skilled, low status and poorly paid jobs while men usually have jobs with higher status and pay. Also women tend to dominate in unpaid domestic work and subsistence food production while men dominate in waged employment and cash crop production.

### Gender needs assessment

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The final stage of gender diagnosis (see above), this entails identifying what the specific practical and strategic needs are of women and men in a given society.

### **Gender-neutral policies**

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These policies are seen as having no significant gender dimension. However, government policies seldom if ever have the same effect on women as they do on men, even if at first sight they may appear to exist in a context where gender is irrelevant. In order to determine that a policy is genuinely gender-neutral, it is necessary to have complete and accurate information about the gender-based division of resources and responsibilities relating to the policy. Otherwise, policies which may be gender-neutral may in fact be gender-blind and biased in favour of males because they presuppose that those involved in and affected by the policy are males with male needs and interests.

### **Gender planning**

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Gender planning is a concept and method introduced in development as a result of the inability of many existing planning processes to address gender inequalities. "Gender planning can be defined as that approach to development planning which is based on an explicit recognition of the unequal relations between men and women in society, which are justified by symbolical codes" (Wieringa, 1994: 51). This definition is based on the premise that societal structures and the symbolic codes which emanate from cultural patterns, laws, processes and procedures reinforce and perpetuate gender inequalities.

Gender planning, as an approach, recognises unequal relations between men and women but intervenes to change these patterns and symbolic codes. It seeks to address unequal gender relations which result in a skewed sexual division of labour, unequal access of women to basic resources, limited political representation of women in decision-making, a tacit acceptance of male violence against women and the continued subordination of women.

### **Gender-aware/redistributive/transformational policies**

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These are aimed at transforming existing gender relations to achieve democracy by redistributing the division of resources, responsibilities and power between women and men more evenly. This policy approach is politically challenging since it seeks to redirect resources to women and requires men to give up certain privileges while taking on responsibilities which result in equity in development outcomes. But they also go furthest towards addressing not only practical gender needs but also strategic gender interests.

### **Gender roles identification**

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The identification of the respective roles played by women and men in the productive, reproductive and community management spheres. It forms an integral part of gender diagnosis (see above).

### **Gender-specific policies**

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A policy that is gender-specific takes into account gender differentials, and targets women or men specifically, but leaves the current distribution of resources and responsibilities intact.

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**Incremental planning**

The process of making slight adjustments to an existing framework without major changes to its goals or priorities.

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**Partial planning**

This entails planning for part of the economy, usually the government's investment plan, with the setting of estimates and goals.

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**Sex-disaggregated data**

This is data collected – via questionnaires, observation or other techniques – that reveal the different roles and responsibilities of men and women. Having data disaggregated by sex is extremely important to being able to assess the impact of a project on women separately from its impact on men.

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**Strategic planning**

The process of linking needs and conditions in the policy in the policy environment to strategic choices within organisations.

## Gender Mainstreaming in Development Planning

A Reference Manual for Governments and Other Stakeholders

**Gender mainstreaming is the current international approach to promoting equality between women and men.**

It is based on the recognition that gender inequality operates at all levels and in all sectors of society, and thus needs to be addressed in the mainstream. It aims to ensure that women and men benefit equitably from all that society has to offer, and are equally empowered to affect its governance and decisions.

The Gender Management System (GMS) is a holistic and system-wide approach to gender mainstreaming developed by the Commonwealth, for the use of governments in partnership with other stakeholders including civil society and the private sector. The GMS is a comprehensive network of structures, mechanisms and processes to enable governments and other organisations to contribute to gender equality through all policy-making, planning and activities.

This reference manual has been produced to assist governments and other stakeholders in mainstreaming gender in development planning. It is also available in an abridged version under the title *A Quick Guide to Gender Mainstreaming in Development Planning*.

Other topics covered by publications in the Gender Management System Series include:

- Concept and methodology of the GMS
- Using gender-sensitive indicators
- Finance
- The public service
- Education
- Trade and industry
- Agriculture and rural development
- Information and communications
- Equal employment opportunities policy



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