

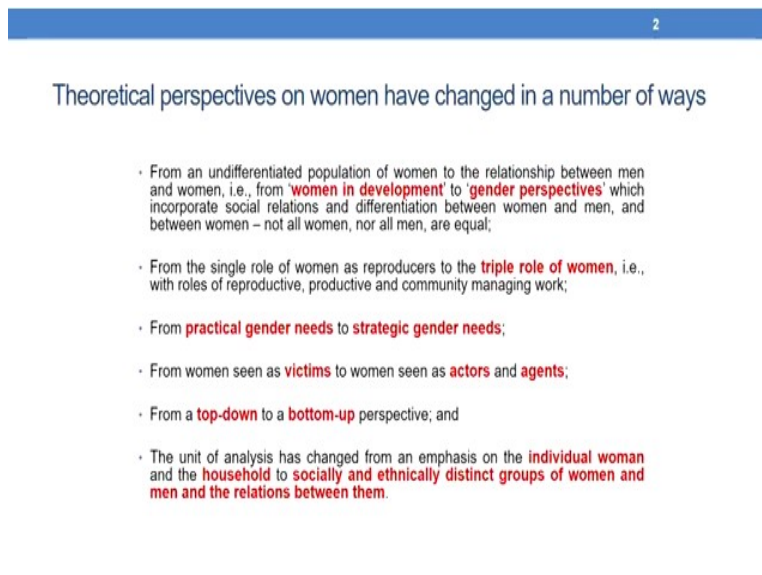
## Development Research Methods

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### Lecture – 22 Gender-Sensitive Indicators and Gender Analysis

Hello and welcome to week seven and lesson three of the NPTEL MOOC's course on development research methods. Continuing with the operationalization aspects of development research methods, in today's class let us discuss about gender analysis and some of the gender sensitive indicators which have these days become integral to development studies and development studies research.

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Theoretical perspectives on women have changed in a number of ways

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

Now let me begin by saying with the help of this slide here that the theoretical perspectives on women today have changed in a number of ways and influence development cooperation with methodological implications for how women in development and gender relations are addressed in development studies. Some of the examples of how these theoretical perspectives have changed are showing on your slide now. For example, we have moved from an undifferentiated population of women to the relationship between men and women that is from women in development to gender perspectives which incorporate social relations and differentiation

between women and men and between women. So, which means that not all women and not all men are equal. Similarly, we have also moved from the single role of women as reproduces to the triple role of women that is with roles of reproductive, productive and community managing work.

We have also moved from different approaches which I will elaborate in small details subsequently. We have moved from the approaches of women in development to gender in development and therefore from practical gender needs to strategic gender needs. We have also moved from women seen as victims to women seen as actors and agents from a top-down to a bottom-up perspective. And the unit of analysis has changed from an emphasis on the individual woman and the household to socially and ethnically distinct groups of women and men and the relations between them.

So, given this context in today's class, we will look at some of the operationalization issues surrounding gender analysis or when we make a gender analysis integral to our development research question. So, what we will cover in today's class is as follows.

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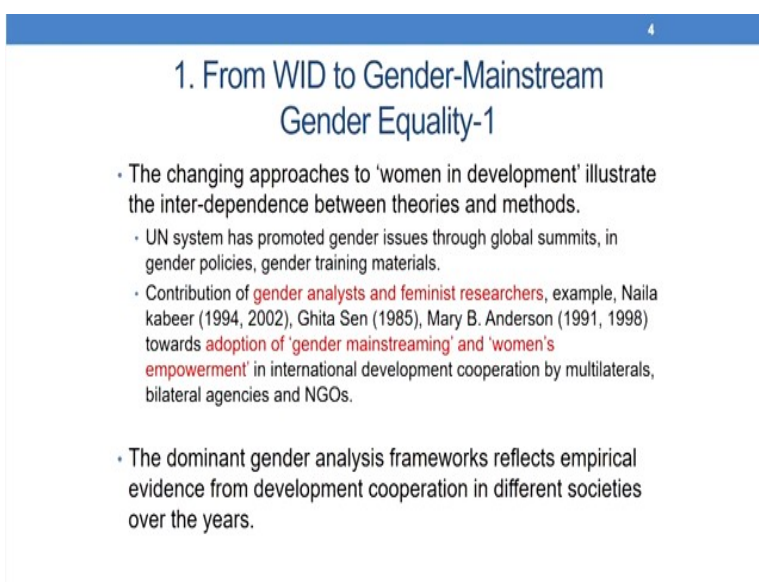
### What we will cover in today's lecture

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

We will first look at what does this movement from women in development to gender mainstreaming, gender equality, or gender in development mean? We will also look at gender analysis and some of the approaches to gender mainstreaming, although I will not go into the

details of gender mainstreaming. Many of these things have been covered in some of the earlier MOOC's courses. For example, students interested might like to go through some of the lectures on the NPTEL MOOC's course on growth and development which has elaborate discussions on gender budgeting and gender mainstreaming and so on. In this class we will also highlight on some of the gender sensitive indicators surrounding the issues of poverty and power. And also look at some of the contesting perspectives with respect to mainstreaming and women's empowerment.

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

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

Now let us first try and understand this movement from women in development to gender mainstreaming. Now over a period of time there have been changing approaches to women in development and this has been illustrated through an inter-dependence between various theories and methods in research. For example, the UN system has promoted gender issues through global summits in gender policies, gender training materials and so on. There has been a large contribution, significant contribution of various gender analysts and feminist researchers. For example, Naila Kabeer, Ghita Sen, Mary Anderson towards the adoption of gender mainstreaming and women's empowerment in international development cooperation by multilaterals, bilateral agencies and NGOs.

Now it is here that let me also give you a sense of what does this movement from women in development to gender and development approaches mean. There is plenty of literature in this

area now WID to GAD. Now basically in the 1960s, and in the 1970s, a number of literatures came out which talked about the prevalence of poverty among different individuals across the world or the population that is inhabiting in poverty. And If we enter into a gender disaggregated analysis with regard to poverty, it was found that more women than men were found to be living in an impoverished stage. And therefore, there came in a concept which was referred to as feminization of poverty and it was also found that more women and children were in impoverished state than men in poverty. And therefore, various associated concepts came in with regard to intra-household distribution of resources and whether household as a unit of analysis should be taken up for further research or we should focus on individuals as a unit of analysis such that the intra-household distribution of resources can be properly captured in development research questions.

Now it is during this time that various feminists and various other agents of development, international development agencies came up with the concept of women in development. Therefore, focusing on welfare programs and various other interventions that could lead towards bringing or pulling women out of the situation of impoverishment. However, with time this approach was criticized and therefore the concept of gender and development came up which started challenging the stereotypical notions of the gender roles provided to men and women in households. And therefore, came the concepts of what is referred to as practical gender needs and strategic gender needs. So, the women in development approach focused more on practical gender needs and the gender and development approach focused more on strategic gender needs. These are some things that we will see in small details in some time.

So, the dominant gender analysis frameworks reflect empirical evidence from development cooperation in different societies over the years.

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

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

And the gender discourse as I just mentioned has transitioned from WID to GAD. And it is in this context that you see various world conferences on women, for example, the United Nations fourth world conference on women in Beijing in 1995 adopted the Beijing platform for action with global agreement that gender equality is the goal, mainstreaming gender equality is the strategy. So, with respect to mainstreaming gender equality we have various concepts such as gender budgeting which is one of the examples of how gender related budgets can be made and gender mainstreaming can take place. So, the mainstreaming strategy basically aimed to situate gender equality issues at the centre of broad policy decisions, institutional structures and resource allocations with respect to development goals and processes.

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

The gender mainstreaming strategies: two perspectives

- 'Mainstreaming' strategies i.e., incorporating gender policies into conventional project and programme work
- 'Agenda setting' strategies aim to create the **conditions under which** women and men can **challenge conventional patterns and structural inequalities** and start to **redefine gender initiatives**.

Now there are two main perspectives with regard to gender mainstreaming strategies. One is mainstreaming strategies with respect to incorporating gender policies into conventional project and programmed work. For example, providing affirmative action with respect to women being brought into the fore from a policy focus. And the second perspective was with respect to agenda setting or strategies which aim to create the conditions under which women and men can challenge conventional patterns and structural inequalities and start to redefine gender initiatives.

Now as I was saying that there are different policy approaches, different approaches to centralizing gender equality and women's issues in development research questions, and particularly with respect to the third world women there have been different policy approaches.

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## Different Policy Approaches to Third World Women

Over a period of time international development cooperation or international development agencies, development practitioners have come up with numerous approaches and it is difficult to summarize them all into one slide. However, an attempt can be made to look at some of the important policy focuses with respect to how international development agencies have approached third world women. Now, let us make an attempt here.

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Issues	Welfare	Equity	Anti-poverty	Efficiency	Empowerment
Origins	Earliest approach: -Residual model of social welfare under colonial administration -Modernization/accelerated growth: economic development model	Original WID approach: -Failure of modernization -Influence of Boseup and First World Feminists on Percy Amendment -Declaration of UN Decade for Women	Second WID approach: -Toned-down equity because of criticism -Linked to Redistribution with Growth and Basic Needs	Third and now predominant WID approach: -Deterioration in world economy	Most recent approach: -Arose out of failure of equity approach -Third World women's feminist writing and grassroots organizations
Period most popular	1950-1970: but still widely used	1975-85: attempts to adopt it during and since Women's Decade	1970s onwards: still limited popularity	Post 1980s: now most popular approach	1975 onwards: accelerated during 1980s still limited popularity
Purpose	To bring women into development as better mothers	To gain equity for women in the development process	To ensure that poor women increase their productivity	To ensure development is more efficient and effective	To empower women through greater self-reliance
Needs of women met and roles recognized	To meet PGN* in reproductive role, relating particularly to food aid, malnutrition and family planning	To meet SGN** in terms of triple role: directly through state top-down intervention, giving political and economic autonomy by reducing inequality with men	To meet PGN in productive role, to earn an income, particularly in small-scale income generating projects	To meet PGN in context of declining social services by relying on all three roles of women and elasticity of women's time	To reach SGN in terms of triple role: indirectly through bottom up mobilization around PGN as means to confront oppression
<small>After Moser, 1989: 1808 Note: MDGs point the most current approach to Gender and Development</small>		<small>*PGN-Practical Gender Needs are needs identified by women and men which arise out of the customary gender division of labour. **SGN-Strategic Gender Needs reflect a challenge to the customary gender relations and imply changes in relationships of power and control between women and men.</small>			

So, in this slide we have made this division with respect to the progress in approaches on the heads of issues, welfare, equity, antipoverty, efficiency and empowerment. At the bottom of this

matrix you would see my reference to PGN- the practical gender needs focusing on women in development approach and SGN or strategic gender needs focusing on gender and development approach. So PGN basically are needs that are identified by women and men which arise out of the customary gender division of labour. For example, in the customary gender division of labour we know that most of the social reproduction work or the care economy is managed by the women and the productive economy, so called production economy is managed by the men. At least this is the general conception or the assumptions that we base our analysis on. And with regard to what are the gender needs arising because of this customary gender division of labour is what is addressed by practical gender needs.

Strategic gender needs on the other hand reflect a challenge to the customary gender relations and imply changes in relationships of power and control between women and men, where one challenges that whether it is solely the responsibility of women to take care of the care economy or women's roles also enter into the production economy, community management and so on and so forth. So, these are things that are addressed by these different approaches.

Now let us look at this slide from left to right starting with the origins of these approaches. Now when we look at it from the welfarist perspective, the earliest approach was that of the residual model of social welfare under colonial administration, focus on modernization, accelerated growth, economic development model which meant that as economic growth takes place, as economic development take place every person in the society would benefit out of it irrespective of whether they are men or women and children. However, when we moved to the concept of equity, the original women in development approach found itself facing various challenges particularly with respect to the failure of modernization, influence of Boserup and First World Feminist on Percy Amendment, declaration of UN decade for women. These are all issues that try to address these challenges. Because increasingly it was seeing that economic growth or the top-down approaches of development and growth have not benefited women equally as they would have done the menfolk.

With respect to antipoverty, the second women in development approach toned-down equity because of criticism and it linked to redistribution with growth and basic needs. Efficiency, third and now predominant women in development approach is deterioration in world economy and empowerment. Most recent approach arose out of the failure of equity approach, third world



women's feminist writing and grassroots organizations. Now what was the period in which it was most popular, the 1950s to 1970s it was most popular. The welfare approach was most popular. But it is still widely used. Between 1975 and 85, there were attempts to adopt it during and since women's decade. 1970s onwards there was still limited popularity, post 1980s which is now the most popular approach and 1975 onwards it accelerated during 1980s and still limited popularity empowerment issues.

With respect to purpose, the welfarist approach try to bring women into development as better mothers. The equity approach to gain equity for women in the development process. Antipoverty focused on ensuring that poor women increase their productivity. Therefore, you would see a number of antipoverty programs doing the rounds during the decades of the 1980s particularly where the focus for example the microfinance institutions, microcredit and so on. Where the focus was on ensuring that poor women increased productivity and that is how they will be pulled out of the situation of poverty. Efficiency to ensure development is more efficient and effective and empowerment to empower women through greater self-reliance.

With respect to the issue of needs of women met and roles recognized. So, to meet practical gender needs in reproductive role, the welfarist tradition focused on meeting practical gender needs in reproductive role relating particularly to food aid, malnutrition and family planning. The equity approach focused more on strategic gender needs in terms of triple roles directly through stage top-down intervention giving political and economic autonomy by reducing inequality with men. Antipoverty tried to meet practical gender needs and productive role toward income particularly in small scale income generating projects. The efficiency approach tried to meet practical gender needs in context of declining social services by relying in all three roles of women and elasticity of women's time. And therefore, there was a lot of focus during this period, the early 1990s on time burden, time poverty, time use surveys and so on. And with respect to empowerment there was an effort to reach strategic gender needs in terms of triple role indirectly through bottom up mobilization around practical gender needs as means to confront oppression.

So, this is basically a very complex framework within which this needs to be analysed. But this is how in very crudely put various approaches with respect to women in development and gender and development has progressed over the period of last three or four decades. Now let us come to

the issue of gender analysis and approaches to gender mainstreaming. Now what is the purpose of gender analysis?

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2. Gender Analysis and Approaches to Gender Mainstreaming-1

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

I. Gender Mainstreaming Elements:

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

Let us begin with this question. The purpose of gender analysis is to understand the mechanism underlying both dominant development problems and policy, program and project interventions in terms of their implications for women and men and for the relationship between them. I have already stated in the beginning that when we are looking at gender analysis we are obviously looking at gender disaggregated information. And how men and women are affected differently because of certain interventions, because of certain policies or because of a certain situation.

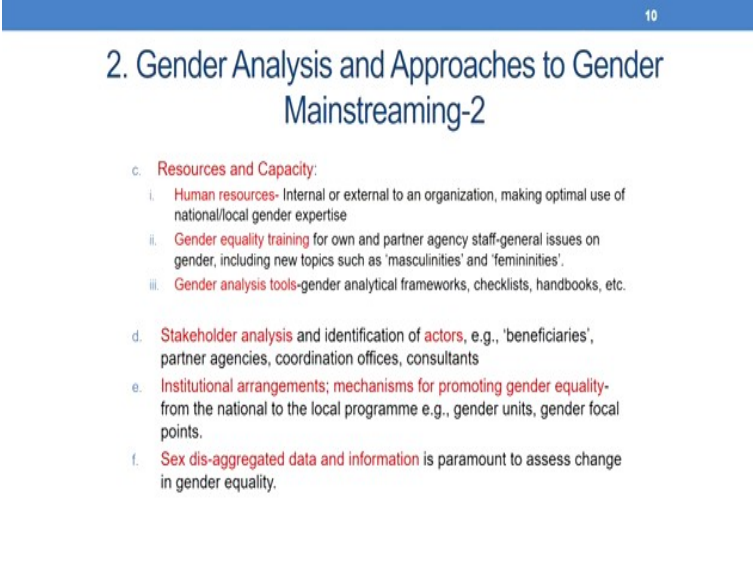
So now let us have a look at what are the gender mainstreaming elements, they may be summarized as follows. They are showing on your slide. So, some of the elements are as follows, one is clear policies and priorities of goals at the national and intervention levels. It is very important that what is the gender policy, what is the priority with regard to different sexes is made very clear. The agenda is set at the national level and at also at the international levels. For example, with respect to nutrition, it is often considered to be the prerogative of women as to whether their children are well fed and schooled or not. And therefore, you would see that I have taken numerous examples of complimentary feeding practices all throughout this course. And you would see that the focus mostly is on women. If women are better educated, children are better nourished and so on. So, this is the link that is established, which means that women's role

or prerogative with regard to their existence in the care economy is again reinforced by the fact that children will be well-nourished only if women are well educated.

Now this is a stereotypical assumption that is made with respect to women. But at the policy level that means the agenda is fixed at the focus on women or the priority with regard to the goal of better nutrition among children also means that girl children should go to school so that they can be better mothers. Now irrespective of whether we agree with this notion or not, but this is how the national agenda is fixed.

Secondly, gender mainstreaming strategies and gender analysis methods. Reasonable level of gender analysis specific to an intervention, one or more clear goals relating to changes in gender equality, some means of monitoring and reporting on the changes in gender equality with identifiable link to intervention, dialogue between a development agency and its partners, civil society organizations, etc.

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

- c. **Resources and Capacity:**
  - i. **Human resources**- Internal or external to an organization, making optimal use of national/local gender expertise
  - ii. **Gender equality training** for own and partner agency staff-general issues on gender, including new topics such as 'masculinities' and 'femininities'.
  - iii. **Gender analysis tools**-gender analytical frameworks, checklists, handbooks, etc.
- d. **Stakeholder analysis** and identification of **actors**, e.g., 'beneficiaries', partner agencies, coordination offices, consultants
- e. **Institutional arrangements; mechanisms for promoting gender equality**- from the national to the local programme e.g., gender units, gender focal points.
- f. **Sex dis-aggregated data and information** is paramount to assess change in gender equality.

Some of the other elements here are resources and capacity. That is again, very important. So human resources, gender equality, training, gender analysis tools. So, with respect to human resources, they may be internal or external to an organization making optimal use of national, local gender expertise. So, when I am referring to gender expertise here or human resources internal or external to an organization, when designing policy interventions with respect to let us

say nutrition, while on the one hand the framework is very important. What is the framework that we are following at the national level so as to meet the outcomes of nutrition among children, nutrition among mothers or women and so on. Whether we are looking at women only as mothers or whether we are looking at women also as individuals also sets the context of the nutrition policy.

Now if the focus is entirely on ensuring that children are well fed, children are well-nourished because children are the ultimate resources for the economy in future and we are a growing economy and therefore we must have well fed and healthy children. Now if the focus is only on this and also, we have already established this link and assume that if women are better educated, there would be better outcomes for children then essentially what we are trying to see here is the role of women only as mothers, as better mothers. So that their education then becomes the instrument through which children become better nourished. So, in this sense then gender expertise also matters a lot with regard to where they want the weight to be on and this is the importance of human resources in this context.

Gender equality training for own and partner agency staff, general issues on gender, including new topics such as masculinities and femininities. Gender analysis tools, for example, we may have gendered analytical frameworks, checklists, handbooks, etc. Stakeholder analysis and identification of actors, example, who are the beneficiaries, who will be the partner agencies, coordination offices, consultants. So similarly, with the same example of nutrition outcomes with regard to children when we are designing an intervention and we are trying to execute an intervention, it is very important with regard to identification of who will be the beneficiaries, who will be the partnering agencies through which this intervention will take place, where will be the coordination offices and so on and so forth. Institutional arrangements, mechanisms for promoting gender equality from the national to the local program, example, gender units, gender focal points, etc. And lastly, sex dis-aggregated data and information is paramount to assess in change in gender equality, which is why in various national level reports within India itself, you would see that much of the data is dis-aggregated by sex, by male, female and also by children. That helps us to assess the change in gender equality that has taken place, however, much remains to be done in this area.

Now let us have a look at some of the gender analytical frameworks that exist.

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### II. Gender Analytical Frameworks

Framework	Focus	Tools
1. Harvard Analytical Framework	Resource allocations for women and men	<ul style="list-style-type: none"><li>• Activity profile</li><li>• Access and control profile to resources and benefits for women and men</li><li>• Influencing factors</li></ul>
2. People-Oriented Planning	Is an adaptation of the Harvard Analytical Framework for use in refugee situations	<ul style="list-style-type: none"><li>• Refugee Population Profile and Context Analysis</li><li>• Activities Analysis</li><li>• Use of resources analysis and an adaptation of Harvard tool 2. Women's socio-political profile compared to men's</li></ul>
3. Moser Framework	Three concepts: Women's triple role (reproductive, productive and community work)	<ul style="list-style-type: none"><li>• Gender roles identification/triple role</li><li>• Gender needs assessment</li><li>• Dis-aggregating control of resources and decision-making</li></ul>
4. Gender Analysis Matrix (GAM)	To determine the different impact development interventions have on women and men	<ul style="list-style-type: none"><li>• Analysis of four 'levels' of society-women, men, household, community</li><li>• Analysis of four kinds of impact-labour, time, resources, socio-cultural factors</li></ul>
5. Capacities and Vulnerabilities Analysis Framework	To help in planning aid in emergencies, and to meet immediate needs	<ul style="list-style-type: none"><li>• Categories of capacities and vulnerabilities</li><li>• Additional dimensions of 'complex reality'</li></ul>
6. Women's Empowerment (Longwe) Framework	Analyses equality by sectors but concentrates on separate areas of social life	<ul style="list-style-type: none"><li>• Measures Levels of Equality</li><li>• Women's Empowerment</li></ul>
7. Social Relations Approach	Analysis existing gender inequalities in the distribution of resources, responsibilities and power.	<ul style="list-style-type: none"><li>• Framework for conceptualizing, studying and implementing Empowerment</li><li>• The Sen-inspired framework- 'ability to exercise choice'.</li><li>• 'Resources', 'Agency' and 'Achievements'</li></ul>

This has been summed up in this table under three heads. The framework, what is the focus of the framework, and what are the tools that are used to address the focus of these frameworks. These are just a few examples. I am sure there are a number of more frameworks that have been added to such analysis with time and that the students may also consider.

So, let us begin with the Harvard analytical framework. Now this is a framework where the focus is on resource allocations for women and men. And it is done with the help of certain tools. For example, the activity profile. So, the activity profile of women and men are jotted down and then access and control profile to resource and benefits for women and men and what are the influencing factors. These are jotted down. And then an analysis is done with respect to resource allocations for women and men.

Another framework is people-oriented planning. Now this is basically an adaptation of the Harvard analytical framework for use in refugee situations. And the tools are refugee population profile and context analysis, activities analysis, which is more or less similar tool that is used in the Harvard analytical framework. Use of resources analysis and adaptation of Harvard tool 2, which is access and control profile, women's socio-political profile compared to men's and so on.

You also have a Moser framework where the focus is on three concepts, women's triple role, which is the reproductive or what I am referring to a social reproduction or the care economy, the productive and the community work. So, women when they are involved in the care economy referred to a social reproduction. Women when they are involved in production or the productive economy, let us say in agricultural commodities or in small scale industry and so on. And women involved in community management or community work. So, this is what we are referring to as a women's triple role. And what are the tools that help us analyze these concepts? Gender roles, identification, the triple role, gender needs assessment, dis-aggregating control of resources and decision making.

We also have gender analysis matrix where the focus is on determining the different impact development interventions have on women and men. So here the analysis of four levels of society, which means that we are carrying out the analysis of interventions on the impact that the interventions have on women, men, household and the community. Analysis of four kinds of impact- through labour, time, resources, socio-cultural factors. We also have capacities and vulnerabilities analysis framework. Here the focuses to help in planning aid in emergencies and to meet immediate needs and the tools are categories of capabilities and vulnerabilities, additional dimensions of complex reality.

Similarly, the women's empowerment framework. Here the focus is on analysing equality by sectors, but concentrates on separate areas of social life. So, measuring levels of equality, women's empowerment. Social relations approach- here the focus is on analysis existing gender inequality in distribution of resources, responsibilities and power. And the tools used are frameworks for conceptualizing, studying and implementing empowerment, Sen-inspired framework, ability to exercise choice, resources, agency and achievements.

Again, I have tried to summarize most of these gender analytical frameworks into just one table, which is a very complex exercise and it would be in the interest of the students to pick up on each one of these frameworks and look into the details of how the tools are used. I have provided references at the end of this lesson which can be used by the students to look up each of these frameworks and see which of these frameworks are most suitable for your area of research. As I keep saying that the context setting is very important. If you go back to the previous classes, you would see that the world views are very important. So, considering the world view that you are

coming from and the context that you are working in, setting up your agenda of your research becomes very important in deciding which framework you would like to choose.

Just to give you an example of the nutrition story that I have been talking about. From these frameworks that I might want to use the gender analysis matrix because I want to look at the impact of labour, time, resources and socio-cultural factors that contribute to the nutrition of children or the growth and monitoring of children. Similarly, I might also want to look up activity profile of the men and women in my study area that contributes to nutrition among children or malnourishment among children. And I might also want to look up the social relations approach.

So, depending upon the story that you want to come up with when you are following your development research question, you might want to combine many of these analytical frameworks also. However, caution must be exercised with regard to how these mixing of analytical frameworks take place because often the agenda behind these conceptual frameworks also are very different. And we may not want to combine frameworks which have contesting and contrasting agendas.

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### III. Challenging Gender Stereotypes

After Levy, 1990

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

It is also true that there are various stereotypical assumptions about women's position in society and in the household. And this is largely prevalent in the area of development, cooperation and

international development. And often when we are carrying out a gender analysis, it becomes very important to challenge these gender stereotypes. Now let us have a look at some of the gender stereotypes that are widely prevalent among the gender analysts or also among the international agencies, international development cooperation practitioners and so on and so forth. And what are the methodological challenges that we face because of these assumptions, because of the stereotypical assumptions there.

So, this slide here shows you the challenging stereotype assumptions made by planners about the household. Often when we talk about the household with respect to the structure of low-income households, the assumption that is made is or it is a nuclear household. You have a male head of the household, a female head of the household and the children. Therefore, most households always also have this question that who is the head of the household? While the assumption often in the case of third world countries is also made that the head of the household has to be a male head of the household. But it need not necessarily be so. But these days many surveys have started disaggregating this information by asking male head of the household and female head of the household. But again, there are certain stereotypical assumptions here because we assume as a given that India has moved far ahead over the period of last three, four decades and therefore all families in this country are nuclear but it need not be so. So, one of the first assumptions with respect to the household particularly in the context of structure of low-income households is the nuclearity of the assumptions. And the empirical and methodological challenges that we face is high proportion of other household structures exist. For example, extended families, women headed households and so on.

So the question that arises is that when we are speaking with respect to policy interventions or welfare interventions trying to reach certain goals, we have goal oriented objectives with regard to nutrition outcomes, let us say or health outcomes or education outcomes and we have started with the assumption of a nuclear family, then how are we dealing with the problems or how are we addressing the problems of other kinds of families, which may also have a very high proportion of existence.

So, second is with regard to the organization of tasks in the household. The assumption usually is that man is the breadwinner and the woman is a housewife. Whereas you would see that women and men are involved in different roles depending on the gender division of labour in the context.



And women particularly have multiple roles because of the reproductive, productive, community managing and community politics roles. Therefore, the very stereotypical and traditional notion of man as a breadwinner and women as a housewife, when we start with this assumption and then when we collect the data and enter into our analysis, we face roadblocks. Because we would see that there are multiple roles that both men and women play in their daily lives and therefore that needs to be contextualized in the case of the research question that you are following.

Similarly, the issue of control of resources and decision making in the household. Now often the assumption is that there is equal access to resources, there is a harmonious gender relation in the household and the household is therefore treated as a unit. Most socio-economic surveys in the developing countries context you would see, also in the context of the developed countries you would see, household is taken as a unit of observation. Most national level survey agencies including the national sample survey organization and so on also collect data at the household level. And why would one collect data at the household level because the assumption here is that the resources are all equally distributed across all members of the household. But if that is so then why is it that the so-called dependent members of the household, most particularly women and children always get an unfair deal vis-a-vis the male members of the households.

So, the challenges that we face are- often there is unequal access to resources for different household members. Gender relations are often conflicting and therefore there is a need for disaggregation of the household. One needs to look at men, women and children separately. One needs to differentiate individuals within the household by age, by marital status. We may have extended members of the family staying within a family. And therefore, desegregation within the household also becomes an important factor in trying to explain the question that we are following.

Okay, now let us move on to looking up some gender sensitive indicators with respect to poverty and power.

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

- Dis-aggregating core human development indicators by sex and composing various gender-related indices. E.g., gender-related development index, GDI.
- The Human Development Report (e.g., UNDP, 2003 and annual) includes the following gender indices:
  - Gender-related development index
  - Gender empowerment measure
  - Gender inequality in education
  - Gender inequality in economic activity
  - Gender, work burden and time allocation
  - Women's political participation

Again, here I will not enter into the details of these indicators. I will only flag off or mention the names of some of these indicators and let me also inform that the details regarding these indicators are all available in public forums these days. They are very easily accessible and students who are interested in looking up into the details of each of these indicators can very well look into by going through the references that I have mentioned at the end of this course.

So, dis-aggregating core human development indicators by sex and composing various gender related indices. I have just mentioned that sex dis-aggregated data or gender dis-aggregated data becomes very important because there are challenges, empirical and methodological challenges to these assumptions that we stick on to. So, in this context various gender related indices have already come up. For example, one of the most famous ones is the UNDP's human development report guided GDI or the gender related development index. And in similar lines we have various other gender indices apart from GDI we have gender empowerment measure, which used to be there earlier and these days have been overridden by the gender development index. You have gender inequality in education, gender inequality in economic activity, work burden and time allocation, women's political participation and so on. Work burden and time allocation has come to the centre of much analysis where the focus is on time poverty and how much time women and men spend on leisure and how that affects their levels of health and nutrition and education and overall conditions of living and so on.

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

- Work on a gender-informed poverty analysis is prompted by ongoing work to monitor the Millennium Development Goals (and now SDGs) and develop Poverty Reduction Strategy (PRS) Papers.
- In order to integrate gender into the poverty diagnostic stage of the PRS is a step to generate data on the four dimensions of poverty (opportunity, capabilities, security and empowerment).
- A study of gender dimensions of poverty and their measurement would help inform an ongoing non-conclusive debate on the relationship between poverty and gender inequality.

Work on a gender-informed poverty analysis is prompted by ongoing work to monitor the erstwhile Millennium Development Goals and now the Sustainable Development Goals and various poverty reduction strategy papers have come up. In order to integrate gender into poverty diagnostic stage of the poverty reduction strategy, it is a step to generate data on four dimensions of poverty. Opportunity. What are the opportunities that women have? What are the capabilities that women have? such that they can be actors in the development space or they can be agents of development in the development space. Security, empowerment. A study of gender dimensions of poverty and their measurement would also help us inform an ongoing non-conclusive debate on the relationship between poverty and gender inequality.

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

- The required studies, both at the macro and micro level are difficult to undertake as **access to documentation of gender dis-aggregated contexts is rather limited.**
- The shifting policy approaches to women in development reflect **contesting perspectives** of what are relevant gender-sensitive or women-specific interventions.
- When it comes to understanding power and power relations between women and men, the influential analysts are **Naila Kabeer** and **Jo Rowlands.**

Now the required studies both at the macro and micro level are difficult to undertake as access to documentation of gender dis-aggregated context is rather limited. And the shifting policy approaches to women in development reflect contesting perspectives of what are relevant gender sensitive or women's specific interventions. When it comes to understanding power and power relations between women and men, the influential analysts in the contest of developing countries particularly are Naila Kabeer and Jo Rowland. And it will be interesting to look up their work for the research work of our students here.

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

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

Now there are different forms of power obviously in order to understand empowerment. Some of the very important ones that I have cited here from Rowlands are power over what power to power with and power from within. So, power over which is basically talking about controlling power which may be responded to with compliance, resistance or manipulation. Power to- generative or productive power which creates new possibilities and actions without domination. Power with- which is a sense of the whole being greater than the sum of individuals. Power from within- the spiritual strength and uniqueness. Its basis is self-acceptance and self-respect. So, there are three dimensions to exploring empowerment- personal, relational, collective. Personal power, you could talk about women's autonomy within the household, women's decision-making powers within the households. Relational women's decision-making power with respect to men, women's decision-making power in a certain household with respect to women's decision-making power in some other households because of the differences in power and position privileges across households. And collective where for example, women's collectives coming together and then carrying out certain interventions within the community and how that leads to different degrees of empowerment.

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Indicators of the Gender Dimensions of Poverty and their  
Measurement After Bamberger et al. , 2001

Dimension of Poverty	Indicators	Measurement
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>• Time budget and time poverty</li> <li>• Employment and labour force participation</li> <li>• Capital and assets</li> </ul>	<ul style="list-style-type: none"> <li>• Household surveys, focus groups, and direct observation</li> <li>• Household and labour market surveys, household surveys, records of credit and finance institutions</li> </ul>
<b>Capabilities</b>	<ul style="list-style-type: none"> <li>• Demographic indicators (infant mortality, life expectancy, etc)</li> <li>• Education</li> <li>• Health and nutrition</li> <li>• Qualitative indicators of capabilities (culture, freedom and autonomy)</li> </ul>	<ul style="list-style-type: none"> <li>• Household and health surveys, clinic records, anthropometric studies, national and sectoral statistical records</li> <li>• Household surveys, school records</li> <li>• Household surveys, clinic records, participant observation, focus groups</li> <li>• Focus groups, participant observations, national quality of life survey</li> </ul>
<b>Security</b>	<ul style="list-style-type: none"> <li>• Economic vulnerability</li> <li>• Exposure to violence</li> <li>• Social capital</li> </ul>	<ul style="list-style-type: none"> <li>• Household surveys, focus groups, Participatory Rural Appraisal (PRA) techniques such as timelines, and periods of stress, diaries</li> <li>• Focus groups, participant observations, case studies</li> <li>• Household surveys, inter-household and transfer studies</li> </ul>
<b>Empowerment</b>	<ul style="list-style-type: none"> <li>• Political empowerment</li> <li>• Control over household resources</li> </ul>	<ul style="list-style-type: none"> <li>• Voting records, key informants, participant observation</li> <li>• Household surveys, case studies, participant observation, key informants, focus groups</li> </ul>

These are some of the dimensions of poverty and indicators that can address these dimensions of poverty and the measurements. This is a very useful classification that can come in handy for people who are interested in gender analysis of the research question. So, the dimension of

opportunities, the indicators are time budget and time poverty, employment and labour force participation, capital and assets. The measurements that we follow are usually based upon household surveys, focus groups and direct observation methods, household and labour market surveys, household surveys, records of credit and finance institutions for capital and assets. For the dimension of capabilities, the indicators are demographic indicators. For example, infant mortality, life expectancy, etc. Education, health and nutrition, qualitative indicators of capabilities, culture, freedom, autonomy. So, these demographic indicators basically tell us how because they build capabilities of being able to access information, access resources. If you are alive you are able to access resources. If you are better educated, you are able to get a job. If you are healthy, you are able to grow your own food. So therefore, these are certain indicators that can help us measure capabilities of men and women within the gender space that we are studying.

And the measurements can range from household and health surveys, clinic records, anthropometric studies, national and sectoral statistical records, school records, health and nutrition data can be taken from household surveys, school records, qualitative indicators of culture, freedom and autonomy can be done through focus group discussions, participant observations, national quality of life surveys and so on.

Similarly, with respect to the dimension of poverty on security, the indicators could be economic vulnerability, which can be measured through household surveys, focus groups, PRAs such as timelines and periods of stress and diaries. For example, we have currently in Assam because of the National Register for Citizens, various organizations have now come up with vulnerability analysis by carrying out surveys from door to door looking up the periods of stress that people face because of not being counted as part of the NRC.

Similarly, exposure to violence. This can be done through focus groups, participant observations, case studies, social capital, household surveys, inter-household and transfer studies and so on. Empowerment could be with respect to political empowerment or control over household resources. What I was referring to as autonomy of women within the household. This can be again done through household surveys, key informant interviews, participant observation, focus group and so on.

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

### I. Arguments posed by proponents of Gender

#### Mainstreaming :

- a. It is critical to **effectively use the global goals and recommendations** for action in development cooperation.
- b. It is important to **improve the focus on legally binding commitments** through international conventions, in particular the CEDAW (Convention on all forms of Discrimination Against Women).
- c. It is important to **distinguish between general development problems and challenges specifically relating to the promotion of gender equality.**
- d. Areas where change is needed:
  - Regularly updating **gender equality policies;**
  - **Institutional arrangements;**
  - **Sharpen policy dialogue and sector approaches;**
  - **Competence development;**
  - **Updating methodologies and tools, etc.**

Now let us try and end today's lesson with some major points with regard to the arguments posed by the proponents of gender mainstreaming and women's empowerment. So, there are two contesting perspectives here. Gender mainstreaming and women's empowerment. The focus should be on what, should be on gender mainstreaming or women's empowerment. And of course, they are contesting perspectives and they are inconclusive also.

So, let us look at some of the arguments posed by proponents of gender mainstreaming. One, it is critical to effectively use the global goals and recommendations for action in development cooperation. They also feel that it is important to improve the focus on legally binding commitments to international conventions. For example, the convention and all forms of discrimination against women. It is also important to distinguish between general development problems and challenges specifically relating to promotion of gender equality. And the areas where changes needed they think is on gender equality policies, institutional arrangements, sharpening policy dialogue and sector approaches, updating methodologies and tools, etc.

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

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

- a. A discussion on how to **understand** women's situation. Women's empowerment is central in this discourse.
  - b. The argument against gender mainstreaming is that 'Gender mainstreaming is a policy adopted from above, progress in this matter will depend entirely on committed individuals' (Sida, 2002).
  - c. Gender agenda is often sidelined as a result of ambiguous strategies, with particular implications for women's empowerment.
- The discourse represents different theoretical and political points of departure. **Structure and agency** play an important role.

The proponents of women's empowerment say that there needs to be a discussion on how to understand women's situation. Women's empowerment is central in this discourse and the argument against gender mainstreaming is that gender mainstreaming is a policy adopted from above. And progress in this matter will depend entirely on committed individuals. If in the hierarchy of people who want to mainstream gender or mainstream gender agendas, if the people themselves in the hierarchy are not committed to this, then it will never happen. And therefore, they posit a women's empowerment as a contesting idea with respect to gender mainstreaming. And many of these arguments hold true, particularly if you look at the gender budgeting exercises that take place where often the gender budgeting exercises are either half-hearted or not done very systematically. Similarly, gender agenda is often sidelined as a result of ambiguous strategies with particular implications for women's empowerment. And therefore, this discourse represents different theoretical and political points of departure. And structure and agency play a very important role here.

I will end today's lesson with Naila Kabeer's conceptualization of empowerment that is showing on your slide here.

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## Kabeer's conceptualization of empowerment

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

Source: Mikkelsen, 2005

As I have said structure and agency play a very important role. Now Kabeer's conceptualization of empowerment suggests that it can reflect change at a number of different policy levels. So, you have deeper levels which is structural relations of class, caste, gender. There are intermediate levels, which is institutional rules and resources and immediate levels, individual resources, agency and achievement.

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## Categories of composite indicators to measure empowerment

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

After Kabeer, 2002: 35-36

Kabeer takes example of the Egyptian researcher Kishore who has used national data to explore the effects of direct and indirect measures of women's empowerment on two valued functioning

achievements. One is infant survival rates and infant immunization. Since women bore primary responsibility for children's health, she hypothesized that their empowerment would be associated with positive achievement in terms of health and survival of their children. So, her analysis relied on three categories of composite indicators to measure empowerment. One was direct evidence of empowerment, second was sources of empowerment, and third was a setting for empowerment. So, these can be summarized as is showing on your slide here together with the variables which had greatest weight in each indicator of empowerment.

So, the indicator, direct evidence of empowerment, the variables with greatest weight are devaluation of women based upon the reports of domestic violence, dowry paid at marriage, etc. Women's emancipation example, belief in daughter's education, freedom of movement, reported sharing of rules in decision-making, egalitarian gender roles, egalitarian decision-making, equality in marriage. For example, fewer grounds reported for justified divorce by husbands, financial autonomy- or currently controls her earnings.

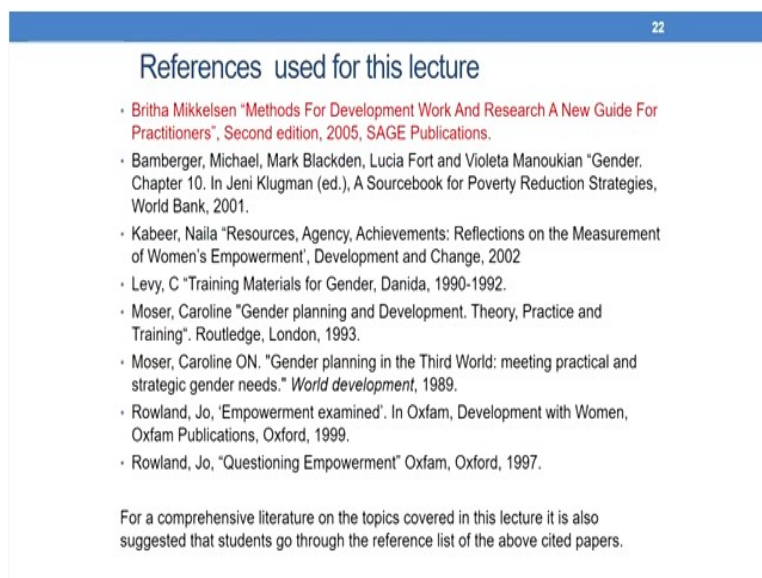
Similarly, sources of empowerment the variables with greatest weight can be participation in the modern sector. Example, index of assets owned female education, you could also add land titles to it. Particularly let us say in the Indian context you could add land titles in the name of women. Lifetime exposure to employment- whether the women in question worked before marriage, whether they are working after marriage, controlled earnings before marriage, after marriage. Setting indicators- the variables with greatest weight are family structure amenable to empowerment, marital advantage, traditional marriage. With respect to family structure- amenable to empowerment. Example does not now or previously live with in-laws. Marital advantage, small age difference between spouses, chose husband, whether the woman concerned had some autonomy with respect to the choice of the spouse that is being made. Traditional marriage whether there is large educational difference with husband or did not have any autonomy with respect to the choice of husband.

So, the results of a multivariate analysis found that the indirect source or setting indicators of women's empowerment had far more influence in determining the value of her achievement variables than the direct measures. It was found with the help of our multivariate analysis that these are the indicators which seem to have a very important influence in determining the value of her achievement variables. There may be several explanations which are beyond the scope of

today's lesson for explaining how and why the setting indicators had more influence on the nutrition indicators than others. And this can be explored in more detail by the students by linking up all of this information that I have provided with the help of this class. Because these issues are at the center of operationalizing these concepts in this entire question with respect to development research and how we analyse them keeping in mind the context setting, the agenda setting and the worldviews that we have been discussing so far.

So, let us end today's class with these references that I have used for this lecture.

**(Refer Slide Time: 49:10)**



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### References used for this lecture

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

The primary material for this class came from Britha Mikkelsen's 'Methods for Development Work and Research'. This is highly recommended book for any student who wants to look up more issues and operationalizing development research methods. However, I have also added on materials from Naila Kabeer. For example, where she talks about resources, agency achievements, and reflections on measurement of women's empowerment. You are also requested to go through the references by Jo Rowland on empowerment, questioning empowerment and for a comprehensive literature on the topics covered in this lecture, I also suggest that students go through the reference list of all the above cited papers.

I hope you have got some information about how to operationalize gender issues when pursuing your development research question. However, this is an inconclusive lesson in the sense that it

is not possible for us to cover all of those topics in this class. However, those interested may put up questions on the portal, which I will take up.

Thank you and see you in the next class.