

# **Gender Thematic Guidance Note**

**By Astrida Neimanis with Arkadi Tortisyn**

**July 2003**

## Foreword

It is with great pleasure that the National Human Development Report (NHDR) Unit of the Human Development Report Office and the Bureau for Development Policy (BDP) present the second NHDR Thematic Guidance Note on Gender. This series came about as a result of the suggestion of national human development report teams from around the world seeking to apply a human development vision to policy-making in various sectors or themes, but finding a paucity of concrete written guidance to support them in this task.

Each of these guidance notes has been jointly commissioned by the NHDR Unit and the Bureau for Development Policy of the United Nations Development Programme (UNDP). The purpose of the series is to provide theoretical background and practical support for development practitioners in addressing certain themes within a human development conceptual framework. The papers offer guidelines and examples for both policy analysis and formulation within a human development approach that can consider the unique conditions and priorities of a geographic region at a given period in time. They do not offer a “blueprint” or prescriptive recipe, as the work of making the human development approach operational in a local context must be rooted in the development challenges faced there. The papers draw upon a review of a number of NHDRs that address the theme in question as well as cutting-edge literature in the field. They also include analysis from global Human Development Reports (HDRs) and international agreements.

The process of producing these papers has itself been an opportunity for the discussion of these themes and their links to human development, as well as the exchanging of experiences and good practices in producing NHDRs. Along the way, a draft version of each publication was shared online with the NHDR Network Group and the relevant UNDP Practice Network, and through an open discussion held at UNDP headquarters. Comments and suggestions emanating from this process have been incorporated into the final version, with the aim of building upon all available research and experience.



Shoji Nishimoto  
Assistant Administrator and Director  
*Bureau for Development Policy*



Sakiko Fukuda-Parr  
Director  
*Human Development Report Office*

## **ACKNOWLEDGMENTS**

The authors, the NHDR Unit and BDP's Social Development Group would like to thank all those who contributed to the production of this guidance note. We are grateful to Shahrbanou Tadjbakhsh and Aster Zaoude for taking this initiative, and to Shahrbanou, Aster, Sarah Burd-Sharps and Dasa Silovic for their substantive guidance and inputs throughout the process. We acknowledge the contribution of Arkadi Toritsyn, who provided an expansion of the discussion on indicators and strengthened various sections of the paper following feedback from colleagues.

We also thank all those UNDP Subregional Resource Facility (SURF) network members who contributed to the network discussion, under the moderation of Roma Bhattacharjea with contributions from Natasha Loayza, Geoff Prewitt, Pablo Ruiz, Nanette Svenson, Carolina Trigueros and Isabella Waterschoot.

Special thanks go to Gretchen Sidhu, Juan Pablo Mejia, and Mary Ann Mwangi for their role in the editing, design and production process.

# Table of Contents

INTRODUCTION	5
I CONCEPT NOTE	6
I.1 Gender and Human Development: The Challenges	6
I.2 Gender and Human Development: The International Commitments	7
I.3 Gender in the Global <i>Human Development Reports</i>	9
I.4 Gender Mainstreaming: The Strategy	10
I.5 Gender and Human Development: The Analytical Approach	11
II GUIDANCE NOTE	15
II.1 Gender and Planning NHDRs	16
II.2 Mainstreaming Gender into Drafting NHDRS	20
II.3 Considering Gender in the Editing, Revision and Finalization of NHDRs	41
II.4 Considering Gender After Production	41
III SECTORAL AND DEVELOPMENT INDICATORS	43
IV ANNEXES	48
Annex I: List of NHDRs Reviewed	48
Annex II: Checklist for Producing NHDRs with a Specific Focus on Gender	50
Annex III: Checklist for Mainstreaming Gender into NHDRs	51
Annex IV: Additional Resources and References	52
Annex V: Planning a Gender-Specific NHDR	55
Annex VI: Selected Commitments of Governments Related to Women's Economic Empowerment (Copenhagen, Beijing)	56
Annex VII: Glossary of Key Terms and Concepts for Analysing Gender and Human Development	58
Annex VIII: Note on Gender and Poverty: Approaches and Methodology	59
V BIBLIOGRAPHY	61

## INTRODUCTION

This Thematic Guidance Note draws on the conceptual frameworks of human development and gender outlined in global *Human Development Reports*, UNDP's strategy and policy papers, and global commitments regarding gender equality. Most importantly, it examines a number of NHDRs addressing the issue of gender equality within the human development perspective. While similarities in policy environments and the manifestations of gender inequalities exist in many countries, this note nonetheless recognizes the unique intersection of challenges faced by each country or region. It is thus not intended to be in any way prescriptive, but rather is designed to serve as a source of lessons learned, insights and experiences, inspiration and support.

The note unfolds in several parts. **First**, the worldwide trends towards achieving gender equality are analysed and the challenges lying ahead are outlined. **Second**, the international commitments on gender equality are presented. **Third**, the gender and human development (GHD) approach that can be used by NHDR teams in engendering NHDRs is developed. **Fourth**, specific steps on how to produce NHDRs focusing on gender and/or mainstreaming gender are outlined. The qualitative/quantitative indicators and indices reflecting the manifestations and causes of gender inequalities are listed. Particular attention is paid to examining the linkages between human development and gender, with specific emphasis on indicators for engendering human development policies. Additional print and Internet sources are also listed.

A total of 21 NHDRs were reviewed for this note (see Annex I for a complete list). Attempts have been made, particularly in part II, to present examples of good practices utilized by NHDR teams (these illustrations are shaded and noted with a / symbol). The review of NHDRs has led to the conclusion that NHDR teams have missed opportunities: the necessary links between gender and human development are, for the most part, still under-analysed. Therefore, while illustrations point to some innovative and thoughtful intersections of gender and human development analysis, best practices that represent the many facets of gender and human development are still to be generated.

## SECTION I: CONCEPT NOTE

### I.1 Gender and Human Development: The challenges<sup>1</sup>

Over recent decades, there have been profound changes in the status and role of women. As noted during the Beijing+5 United Nations General Assembly Special Session held in 2000, most countries recorded progress in narrowing gender gaps in education and health. For example, primary enrolment rates of girls approximately doubled in South Asia, Sub-Saharan Africa, the Middle East and North Africa in the last 50 years, while women's life expectancy increased by 15-20 years in developing countries. Women have entered the labour force in unprecedented numbers (for example, since 1970, women's labour force participation increased by an average of 15 per cent in East Asia and Latin America), which has also increased their potential participation in decision-making at various levels, starting with the household. These are important gains for gender equality, and represent a basis for continued change.

At the same time, Beijing+5 and recent research have repeatedly highlighted such progress as slow and uneven. Major obstacles to gender equality in all spheres of life persist:

- € Two thirds of the world's 876 million illiterates are female.
- € Of the world's 1 billion poorest people, an estimated three-fifths are women and girls.
- € Despite the fact that the majority of the world's poor are women and girls, poverty reduction strategies insufficiently address the differential impact of poverty by gender and inadequately target gender equality as a core objective.
- € Women represent a growing proportion of people living with HIV/AIDS. In countries with high HIV prevalence, young women and girls with little or no education are at much higher risk of contracting HIV than their male counterparts.
- € In only 16 countries in the world is women's representation in national parliaments above 25 per cent. On average, they accounted for 11 per cent of parliamentarians worldwide in 1999, compared with 9 per cent in 1987.
- € Of 466 female cabinet ministers holding portfolios in 151 countries in 2000, about 20 per cent were heads of ministries of women's and social affairs, but less than 5 per cent were heads of ministries of finance, economy and development.
- € Whereas women's contributions to the global economy are growing rapidly, women's labour remains undervalued and undercounted in national accounts; data disaggregated by sex are still poorly developed.
- € An estimated one-quarter to one half of all women has suffered physical abuse.
- € Women and children comprise about 80 per cent of the world's 35 million refugees and displaced people, and they are particularly vulnerable to sexual violence while in flight, in refugee camps and/or during resettlement.

---

<sup>1</sup> Sources for this section include: "UNDP Thematic Trust Fund Document on Gender"; *Engendering Development* (World Bank, 2001); and UNDP Gender and Development Series Monograph #10, "Men, Masculinities and Development" (2000).

At the same time, recognition and awareness has been growing in recent years regarding the place of men in the gender and human development paradigm:

- € Dominant conceptions of masculinity and “manhood” are an integral factor in upholding gender inequality. Moreover, the socialization of masculinity is linked not only to inequitable social, political and economic models, but also to armed conflict and the violation of the rights of marginalized groups.
- € Increasing men’s role in reproductive labour has been confirmed as an essential prerequisite for achieving gender equality in all spheres.
- € Men, too, bear the costs of gender inequalities and dominant gender ideologies: in some countries, these can include increasing male mortality rates, suicide rates that far surpass those of women, increasing social isolation, and problems related to alcohol, drugs and other substance use.

The challenges associated with all of the above issues persist, despite international conventions, global agreements, and in many cases national, constitutional and other laws affirming the right of all people to be free from gender discrimination.

## **I.2 Gender and Human Development: The international commitments**

In light of the challenges presented above, member countries of the United Nations have committed to various international platforms, targets and goals related to the eradication of gender inequality. The Millennium Development Goals (MDGs), which are set out in the United Nations Millennium Declaration of September 2000, provide a clear and shared vision of development priorities and tasks. The MDGs include halving extreme poverty and hunger; achieving universal primary education; promoting gender equality; reducing child mortality by two-thirds; reducing maternal mortality by three-quarters; reversing the spread of HIV/AIDS, malaria and tuberculosis; ensuring environmental sustainability; and building a global partnership for development. Several MDGs explicitly note the need to eradicate gender disparities and address issues that have explicit gender implications:

- € By 2015, all children, boys and girls, able to complete a full course of primary schooling
- € Girls and boys to have equal access to all levels of education
- € By 2015, to reduce maternal mortality by three quarters
- € To provide special assistance to children orphaned by HIV/AIDS
- € To promote gender equality and the empowerment of women as effective ways to combat poverty, hunger and disease and to stimulate development that is truly sustainable
- € To develop and implement strategies that give young people everywhere a real chance to find decent and productive work
- € To develop strong partnerships with the private sector and with civil society organizations in pursuit of development and poverty eradication

Significant efforts are being made to operationalize the MDGs on the ground and to translate them into practical action tailored to national and regional conditions. The MDGs have

become the platform for collective actions involving governments, political parties, civil society, the business community and development agencies across the world. NHDR teams play a pivotal role in assuring national ownership of the MDGs and proposing national strategies around achieving them.

This note is designed to help the NHDR teams in customizing gender-related MDGs and other international agreements to national circumstances, in reshaping the essence of national public debates and political discussions, and, what is more important, in designing national short- and medium-term strategies and policies to achieve these commitments. Although the process of setting national gender-related development goals and deciding on budget priorities is a very complex enterprise – reflecting national traditions, patterns of policy-making and many other factors – this note attempts to present the analytical framework as well as some indicators and indices that may be used in engendering human development policies.

Other international commitments on gender equality include:

**The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW):** Countries that have ratified CEDAW are committed to realizing equality between women and men through ensuring women’s equal access to and equal opportunities in political and public life, as well as education and employment. Moreover, the committee responsible for overseeing implementation of CEDAW periodically issues recommendations that can guide countries in taking concrete action to eliminate gender discrimination.

**The Fourth World Conference on Women and Beijing +5:** In 1995, governments worldwide agreed to the Beijing Platform for Action, which committed them to a concrete blueprint for action on eliminating gender equality. Moreover, in 2000, at the 23<sup>rd</sup> Special Session of the UN General Assembly, participating governments reached consensus on the “Beijing +5” agreement, which reaffirms their commitments to the implementation of the Beijing Platform for Action. The document includes over 100 actions at all levels and in all sectors and spheres of life, outlined in specific and practical terms.

At the same time, the targets agreed upon at international forums may not be sufficient to ensure de facto gender equality for all men and women. While NHDRs can refer to these commitments as means of promoting further awareness and providing frameworks to guide analysis and recommendations, NHDRs should also seek to “raise the bar” on bare minimum targets, and promote country-specific goals for the attainment of true gender equality as a prerequisite for sustainable human development.

### **Box I.1: Are gender-related targets agreed at Cairo, Copenhagen and Beijing sufficient?**

During the Cairo (1994), Copenhagen (1994) and Beijing (1995) world conferences, governments pledged to meet a variety of targets related to gender equality. Those to be achieved by the year 2015 included the following:

- ↓ Provide universal primary education in all countries.
- ↓ Achieve an infant mortality rate below 35 per 1,000 live births and an under-five mortality rate below 45 per 1,000.
- ↓ Make reproductive health care accessible to all individuals of appropriate ages through the primary health care system.
- ↓ Achieve equivalent levels of education for boys and girls.
- ↓ Reduce maternal mortality rates by a further one-half.
- ↓ Countries with the highest maternal mortality rates should aim for a rate below 75 per 100,000 live births; those with intermediate rates should target a rate below 60.
- ↓ Countries with the highest mortality rates should achieve life expectancy greater than 70; all countries, a life expectancy greater than 75.

However, even with the achievement of these targets, certain gender equality related goals might not yet be achieved. In order to promote discussion and agree on further targets, the United Nations Development Fund for Women (UNIFEM) advocates consideration of the following:

- ↓ End the disproportionate presence of women among the poor by 2105.
- ↓ Close the gender gap in the enjoyment of leisure by 2015.
- ↓ Introduce schemes of social protection for informal sector workers by 2015.
- ↓ Raise women's share of administrative and managerial positions to at least 30 per cent by 2005 and 50 per cent by 2015.
- ↓ Raise women's share of seats in elected assemblies at the local level to at least 30 per cent by 2015.
- ↓ Ensure that all women employees earn a living wage by 2015.

Source: *Progress of the World's Women* (UNIFEM, 2000)

### **I.3 Gender in the global *Human Development Reports***

Over the last decades, as the broader UN community was affirming the above commitments on the international stage, UNDP was developing theoretical frameworks and concrete tools to both further the understanding of the interrelationships between gender equality and human development, and to provide support to countries in redressing gender inequalities.

One of UNDP's flagship tools to serve these purposes is the global *Human Development Report*. Each report annually takes on a specific theme, and the 1995 edition championed the goal of gender equality. This report was pioneering in many ways:

- ≠ The multifaceted factors contributing to gender inequality were outlined and analysed, thus establishing a holistic and multisectoral approach to achieving equality.
- ≠ Comparative regional balance sheets were provided, highlighting progress and deprivation in terms of gender equality, and statistical tables and boxes facilitated both regional and country-level comparisons.

- € The gender-related development index (GDI) and the gender empowerment measure (GEM) were introduced as suggested composite measures for capturing gender disparities and their adverse effects on social progress.
- € The impact of unpaid work and the burden of reproductive labour on women were analysed and placed squarely on the human development policy agenda.
- € Concrete examples of the impact of actions taken by governments to reduce gender inequalities were offered.

In summary, the 1995 *Human Development Report* marked a new era in human development thinking and practice, where gender equality could no longer be justified as a “special” or “marginal” issue. Moreover, concrete tools and examples of analysis were now at the disposal of countries for adaptation at the national level. Subsequent reports have retained the GDI and GEM as comparative composite measures, and have integrated an analysis of gender in terms of issues such as consumption patterns, time use and household decision-making (1998), as well as globalization and the “care” economy (1999).

At the same time, there is a continued need to revisit the questions raised in the 1995 report and increase the prominence of gender considerations in relation to development policy-making, accountability, macroeconomic analysis and other areas.

#### **I.4 Gender Mainstreaming: The strategy**

According to the UN Economic and Social Council (1997), gender mainstreaming is:

*“... the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in all areas at all levels. It is a strategy for making women’s as well as men’s concerns and experiences an integral dimension of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated.”*

Gender mainstreaming is a bare-minimum objective towards which all NHDRs should strive, regardless of the specific area of focus. All issues, in one way or another, are gender issues. Furthermore, according to UNDP’s corporate strategy and the Strategic Results Framework 2000-2003, the UNDP Administrator’s Direct Line 11 and other important UNDP policy documents, gender equality and women’s empowerment are priorities for UNDP’s work, and gender mainstreaming has been identified as the key strategy for achieving these goals. The UNDP Thematic Trust Fund on Gender reiterates this mandate. Moreover, gender mainstreaming represents the core essence of UNDP’s (draft) Strategy for Gender Equality. In the broader context of the United Nations, gender mainstreaming as a cross-cutting strategy was agreed upon at Beijing +5.

Gender mainstreaming should therefore be adopted by all NHDRs as well. This will reassert the critical place of gender equality in the overall human development paradigm and help guarantee true sustainable development, where people – *all* people, both men and women – are put at the centre of development. Specifically, this translates into demonstrating how

concerns about gender equality are relevant to all themes and issues discussed in the NHDRs (in analysis and recommendations), as well as explicitly advocating for policy makers to adopt gender mainstreaming as a policy-making strategy.

## **I.5 Gender and Human Development: The analytical approach**

*“Women’s issues, as they have been conceptualized in the region, continue to take a back seat to other stated government priorities, such as economic and political crises, conflict and violence. There is little recognition that all these issues are intrinsically related to a lack of overall human, including women’s development.” (South Asia 2000)*

The development approaches of the 1960s emphasized women’s reproductive roles as mothers and viewed them as passive beneficiaries of development assistance. Projects worked on improving women’s role as care providers to their families, especially children. The women in development (WID) approach introduced in the mid-1970s departed from such a narrow focus and started seeing women as untapped resources that can contribute to development in their households, communities and countries. The WID approach helped in mobilizing and organizing women around issues that are significant for them; however, the emphasis was on improving their economic and social status without full consideration of the sociopolitical contexts, gender relations and ideologies that produce inequality.<sup>2</sup> The task of changing institutional frameworks that perpetuate gender inequalities was not explicitly addressed. While women-only programmes, such as provision of micro-credit and income-generating employment, brought more women into the development process, these initiatives were narrow in their focus.

With the introduction of the gender and development (GAD) approach,<sup>3</sup> the emphasis has shifted towards the broader gender perspective and the social construction of gender roles and relations. The term gender refers to the specific rules and roles for men and women in a society. There are a number of social, economic, political and cultural attributes and opportunities associated with being female and male. Men and women have different access to and control over resources and participation in decision-making, which is reflected in economic, social, legal and cultural institutions. The GAD approach recognizes that these differences can change over time and that the positions of those who are disadvantaged in terms of accessing resources and/or having rights can be improved. As a result, gender equality that can be defined as equal enjoyment by women and men of socially valued goods, rights, opportunities, and resources can be achieved.

While both WID and GAD (and a mixture of the two, as often shows up in practice) have value, there is a need to reassert a “holistic” gender mainstreaming approach and to promote an understanding of gender and development that moves beyond the compartmentalization and marginalization of women’s issues. It is important also to assure that development policies address the goal of gender equality and the progress made towards gender equality has a significant cross-sectoral positive impact.

---

<sup>2</sup> 1995 *Human Development Report* (UNDP, 1995) and M. Marchand and J. Parpart, pp. 13-15.

<sup>3</sup> *Ibid.* This approach notes that social organization, economic and political life can not be fully analysed independently of one another.

The human development paradigm addresses the limitations of women-focused approaches by placing people at the centre of the development process. It views development as a process of expanding the range of things that a person can be and do in order to improve human lives. People's choices can grow by enlarging their capabilities to lead long and healthy lives, to be knowledgeable, to have a decent standard of living and to participate actively in public life through democratic institutions. In order to achieve these goals and assure human development, the obstacles hindering people's choices – such as limited economic and educational opportunities, absence of civil and political freedoms and gender-based disparities in access to resources and rights – have to be eliminated. The tasks of achieving gender equality and human development are therefore complimentary and mutually reinforcing.

Achieving gender equality is in itself an important goal of human development. The failure to remove the obstacles to expanding opportunities for all men and women represents a serious threat. "Putting people first" cannot afford to deal in averages and aggregate indicators: the rights and welfare, choices and opportunities, of every individual – woman, man, boy, girl – have to be improved. Human development cannot take place when the opportunities of half of humanity are restricted; therefore the task of achieving gender equality should be put at the heart of the human development process.

/ "In this report, we move beyond the usual focus on women's access to social services, and investigate the opportunities and constraints that women face in the labour market and in the judicial system, as entrepreneurs and political representatives. Institutionalized violence against women is investigated, rather than individual incidents of violence. Further, it is recognized that all issues are women's issues, as long as people – which include women – are affected...

"Throughout this report, the overriding policy recommendation is that the policies developed by South Asian governments, NGOs and private sector bodies must be gender-aware, in order to halt and reverse processes of gender discrimination that undermine the region's attempts to develop in a way that is equitable and sustainable." (South Asia 2000)

Gender in the context of human development must thus be broadly approached from two necessarily complementary angles:

- € How is gender equality affected by the human development situation?
- € How does gender inequality impact the human development situation?

This note therefore introduces the concept of gender and human development (GHD) as a specific GAD approach. GHD incorporates a specific focus on women (and men), but necessarily places this analysis within the context of overall human development. It differs from a general GAD approach only in that it makes the "human" component of development explicit, and thus specifically addresses development questions according to the now well-established human development paradigm. Moreover, GHD highlights the increasing attention of gender analysts and experts to the links between macroeconomic and other development policies, and their differentiated impact on men and women, as well as the

negative impact (economic, social and other) of gender inequality on the overall human development situation.

This means, in concrete and practical terms, an NHDR that adopts a GHD approach must:

- a) understand and adopt a human development perspective (see above)
- b) understand and adopt an approach that does not marginalize women or gender as a separate theme, but posits these as an integral and indivisible aspect of human development more generally<sup>4</sup>
- c) look at the situation and status of *both* women and men and identify any disparities in their capabilities and choices (i.e., rights, resources, and opportunities to gain access to and enjoy these)
- d) adopt methodology that allows for analysis of gender differences going beyond differentiated outcomes
- e) analyse the cause(s) of any gender disparities
- f) analyse the impact of these disparities not only for women or men, but for human development and the prosperity and well-being of the nation as a whole
- g) explicitly posit and analyse the links between gender disparities in different areas of focus (e.g., poverty, participation, education, health, etc.)
- h) identify and analyse significant disparities among women as a group or men as a group (*vis-à-vis* age, ethnicity, regional or rural/urban differences, social status, level of education, etc.)
- i) incorporate use and analysis of indicators that reveal various aspects of gender and human development in an instructive way (e.g., GEM, GDI and others)
- j) establish a participatory production process that allows for and values equally the inputs of both women and men.

---

<sup>4</sup> This is not to say that gender should never be highlighted as a priority focus. In certain situations, this is warranted and certainly encouraged. The point, however, is that it should not be an “either-or” situation – gender should always be treated as an indivisible element of human development.

## **Box I.2: Will GHD take the focus away from women?**

Some activists and advocates for women's rights are suspicious of a change in UNDP policy on gender that appears to move away from an explicit focus on women. Below are some common concerns and the ways in which they can be addressed:

*"But women are the main objects of gender discrimination, and they disproportionately suffer its consequences." Analysis shows this to be true. A GHD approach does not cover this up, but highlights it – in the context of the overall development situation.*

*"Women's rights are the main issue. If these are ensured and protected, gender discrimination will cease to be an issue."*

*Human rights, and specifically women's rights, are integral aspects of ensuring sustainable human development. A GHD approach, however, does not look at rights in isolation, but in the context of human development and prosperity of the nation as a whole. A rights approach and a GHD approach are not mutually exclusive – they complement each other.*

*"Focusing on gender turns the focus away from women to men. It dilutes the attention to women's issues." Because men are part of the problem, they must be part of the solution. Solutions will not be sustainable unless they involve all of society.*

*"Because for the most part men still control the policy agenda, a shift to 'gender' means that women's voices and concerns will be lost."*

*This is all the more reason to adopt a GHD approach, which holistically looks at the connections between participation and voice as inherently linked to human development.*

Most importantly, a gender and human development approach does not cancel the need for examining women's rights, participation or situation. These are and remain necessary parts of the equation. A gender and human development approach expands this analysis, and places it in a broader context.

At the same time, concerns such as those above should be taken very seriously, as they reflect the tenuous position women occupy in human development theory and practice. Too often, lack of political will, resources, understanding and follow-through has undermined progress towards full eradication of discrimination against women. This is why the justification of a GHD approach needs to be thoroughly explained and understood.

## SECTION II: GUIDANCE NOTE

### Introduction: Gender and the NHDR process

In order to produce an NHDR that is gender sensitive and meaningfully furthers national discussion on issues of gender and human development, questions of how best to approach questions of gender should be considered at all stages of the NHDR process. This can occur in many different ways: by mainstreaming gender issues into the discussion of other human development themes, by furthering specific discussions on gender and development, by including gender experts and activists at various stages during the process. This may involve commissioning specific research, applying innovative, gender-sensitive data analysis, or highlighting case studies that exemplify gender-related challenges. Finally, policy recommendations and follow-up discussion forums on the NHDR should consider how to most effectively highlight gender concerns.

Given the wide variety of entry points and opportunities for including gender in the NHDRs, this guidance note is not intended to be prescriptive, but rather to stimulate ideas, suggest frameworks for producing gender-aware NHDRs, and highlight positive practices undertaken by various NHDRs in recent years. For the sake of clarity, the note discusses entry points for addressing gender according to four stages of the NHDR process, which could be systematized as follows:

**Table II.1 - The NHDR process**

Stage	I. Conceptual development and planning	II. Drafting (research and writing)	III. Revision, finalization and editorial process	IV. Post-production: dissemination, evaluation and follow-up
Objectives and outputs	Deciding on general and chapter themes, priorities and focus of the NHDR. Production of an outline or concept paper to guide the drafting stage.	Data collection and analysis. Preparation of draft of the report. Draft of conclusions and recommendations.	Review of the draft. Suggestion of changes or additions. Refocusing of chapters and overall direction of report, if necessary (links to human development concept). Amendments to conclusions and recommendations.	Wide dissemination. Soliciting of comments and critiques. Sustained dialogue and debate on issues raised in the report. Promoting debate on policy recommendations. Monitoring and evaluating impact of the report.
Actors	UNDP NHDR team, human development think-tanks or policy partners, national counterparts, consultative experts	NHDR team, experts, policy institutions, researchers, consultants, civil society representatives	NHDR team, various experts (national and/or international), UNDP analysts	UNDP, NHDR team, civil society, media, policy partners and counterparts

Annexes II and III contain quick-reference checklists for addressing gender in both mainstreamed and gender-specific NHDRs, according to these four stages of the process.

## **II.1 Gender and planning NHDRs**

### **Gender-Related Objectives of NHDRs**

It is important to have clear policy objectives in mind when preparing an NHDR. While specific policy objectives will be determined according to the national situation and context, gender-related objectives are likely to fall into one of the categories below:

#### ***a) Confirming the position of gender equality within the human development paradigm***

The first important gender-related objective is to confirm the importance of gender equality within the human development paradigm. This includes highlighting the overall costs of inequality, as well as the benefits that enhanced equality brings not only to individual women and men, but to societies overall. The NHDR policy objective here thus concerns bringing gender sensitivity and awareness to public policy processes, particularly macroeconomic and development planning.

Practically, this means including gender as a central development issue, rather than as a marginalized or “special interest” concern.

#### ***b) Studying urgent gender and development issues and providing specific policy recommendations on how gender equality can be achieved***

A second gender-related policy objective of NHDRs is to draw policy makers’ (and others’) attention to pressing concerns in the area of gender and development. The policy objectives here entail enhancing the information and analytical base on gender as well as the advocacy of recommendations (including concrete policy initiatives) to alleviate these burning gender concerns.

Practically, this requires in-depth analysis of those aspects of development where gender inequalities are a top priority – they might include sectoral issues such as gender equality in education or the labour market, or cross-cutting issues such as human rights or weak policy frameworks. They may also address specific gender concerns, such as violence against women or the caring economy and unpaid reproductive labour.

#### ***c) Demonstrating and advocating gender mainstreaming***

Thirdly, NHDRs may wish to demonstrate and advocate gender mainstreaming (see part 1 for a fuller discussion of gender mainstreaming). Even if gender is not considered the focus of the NHDR, integrating gender concerns into the discussions of priority issues or themes should be a baseline approach for all reports.

Practically, this means assessing the gender implications of any number of development policy issues discussed in the report and providing recommendations on how to use gender mainstreaming as a policy-making strategy.

## Box II.1: Why engender?

Experience shows that we are sometimes reluctant to broach the topic of gender. Below are some reservations that are commonly expressed, accompanied by justifications for pursuing a gender agenda.

*“But women’s opportunities were discussed in last year’s report. We are looking at a new theme this year.”* In the overall context of human development, gender is not a special theme. Just as no credible discussion on human development can sidestep the question of poverty, gender, too, should be integrated explicitly into any discussion on human development.

*“But both men and women are poor. The issue is poverty, not gender.”*

Research consistently shows that women and men experience poverty in different ways. Attempts to disaggregate the human poverty index (HPI) and other measures of poverty consistently reveal gender differences. Without a gender-sensitive analysis of poverty, the true face of poverty will not be revealed, and appropriate and relevant policy recommendations will not emerge from your analysis.

*“Macroeconomics, trade, economic growth, globalization – these are all ‘big’ issues that are gender neutral. There is no place for a discussion on gender here.”*

New research is increasingly highlighting the impact of macroeconomic decisions and policies on gender equality. Until we start making these links explicit in our analyses, truly sustainable human development, where both men and women can benefit and contribute equally, will remain elusive.

*“Gender equality is not a top priority for us: there are more pressing economic and social problems the report should address.”*

As this report highlights, attention to gender differences should be mainstreamed into every report, regardless of its theme. This will not detract from your chosen priority focus, but will rather deepen the analysis of the issue.

*“Our national counterparts tell us what the important issues are; they are our clients. Gender is not on the top of their public policy list.”*

As stipulated in the Corporate Policy on NHDRs, UNDP Country Offices have a mandate to identify relevant issues and initiate policy debates and dialogues. It is UNDP’s role to advocate for necessary attention to gender equality and to bring it to the table, if it is not already there.

*“We do not have professional experts who could undertake the sort of analysis you are suggesting.”*

This may be true – a gender and human development approach is relatively new, and capacity and expertise still need to be built in this area. However, as stated in the Corporate Policy on NHDRs, the NHDR process should also be a contribution to capacity-building at the national level. UNDP has a wide variety of policy papers and analyses that can be accessed to guide researchers and writers. Furthermore, civil society organizations involved in gender issues have unique knowledge and could make important contributions to the report. Finally, outside experts from UNDP SURFs can be invited to participate in the conceptual development stage and reviewing/commenting on the final draft, which can help to fine-tune attention to pertinent gender issues.

*“We do not have the necessary data to undertake such an analysis. And commissioning special research is expensive – we do not have the funds.”*

Often, data is collected that can be disaggregated by gender – it is just not presented as such. Go back to the databases and see whether gender disaggregation can be performed. Proxy calculations and estimations can be developed, based on data that is available. If other research is being commissioned for the NHDR, ensure that a gender approach is mainstreamed into the research terms of reference. Finally, simply noting the lack of data and suggesting research initiatives is an important contribution to raising awareness about gender issues.

## Structure: Gender-Specific and Gender-Mainstreamed NHDRs

In terms of gender, another important step in the conceptual development of an NHDR is to decide how and to what extent gender will be presented as a theme. Gender can be approached by NHDRs in two ways:

- i. Mainstreaming, or integrating, gender concerns into general NHDRs or those looking at other specific questions.
- ii. Focusing on gender inequalities, including the status of women, as a specific area of concern. This may take the form of one chapter, or of an entire report dedicated to this question.

As mentioned above, even if the specific approach is followed, this does not cancel the need to integrate gender concerns in other chapters or subsequent reports. A special focus on gender is warranted, which comes over and above, and not in place of, mainstreaming:

- ∄ If gender inequality is noted as an especially urgent development or public policy priority
- ∄ To strategically coincide with major national initiatives on gender issues (e.g., an anniversary of CEDAW ratification, a major national conference or event on gender equality, etc.)
- ∄ To strategically coincide with global or regional events (e.g., follow-up conferences on Beijing; linking with the designated theme of global or regional reports)

At the same time, when a mainstreaming approach is adopted, there is a tendency to stick to issues where women can be compared with men (education, health, the labour market). This might make important issues invisible, such as gender-based violence, unpaid labour and the caring economy, or female genital mutilation. These concerns affect women specifically as *women*. Their neglect in a mainstreamed approach stems from the fact that the standard or status quo is often seen from the male perspective. In practice, then, there may be a need to mainstream gender concerns *while also* highlighting specific gender issues.

/ NHDRs can be gender-specific and gender-mainstreamed

A gender-mainstreamed approach does not preclude the possibility of highlighting gender-specific issues at the same time. Three examples include:

South Asia 1998: The overall theme of this report is education for development, not gender. Nonetheless, gender is consistently and critically interwoven throughout the observations, analyses and recommendations contained in this report. Moreover, *specific* analysis of gender disparities is the focus of one chapter (“Removing Gender Disparities”). This is (not least) because gender inequalities both contribute to and are impacted by development challenges in the sphere of education, as the report takes great pains to highlight. This shows how gender, although not the central focus or theme of a report, can become one of the primary “lenses” of analysis.

Kazakhstan 2000: Some NHDRs include special sections on gender and poverty; others integrate it throughout the poverty analysis. The Kazakhstan NHDR, however, does both: while consistently asserting the importance of a gender-responsive approach to poverty throughout the report (Chapter 1, for example, notes that “not enough attention has been paid to the gender aspect of poverty”), the gender-specific aspects of poverty are separately emphasized. A section entitled “Gender Aspects of Poverty in Kazakhstan” is included, where causes of women’s increased vulnerability (widespread stereotypes, prejudices, discrimination within the labour market) are discussed, and regional disparities in men’s and women’s income poverty are noted.

Somalia 1998: This NHDR notes that “it is not enough to advocate ‘women’s issues’”, and presses for gender mainstreaming along with giving women voice and power in decision-making and matters of human development. At the same time, it still points to girls’ education and female circumcision as two specific gender issues needing to be addressed. This represents a GHD approach that still acknowledges the necessity of addressing critical problems women specifically face.

### **Anticipating the Need for Capacity-Building and Specific Gender Expertise**

In order to assist the NHDR team in considering gender issues that will be relevant for the report, a gender expert should be part of the core idea-generating and conceptualization group. Furthermore, identification of potential gender dimensions may bring up important questions that the NHDR team is not fully equipped to handle. At this stage, the need for additional, specific gender expertise on the team can be anticipated, so that appropriate candidates or other solutions can be identified.

A quick checklist for ensuring adequate gender-related capacity might include questions such as:

- € Would the entire team benefit from gender analysis training?
- € Does the NHDR team include a gender economist or an expert who can analyse development planning and overall human development trends from a gender perspective?
- € In cases of gender mainstreamed reports, do key experts for the report’s main themes (e.g., human rights, HIV/AIDS, public policy process, education) have familiarity and capacity related to the gender dimensions of these issues?
- € Does the team include a competent data analyst who can correlate and cross-reference existing data sources to answer specific gender-related questions?

## II.2 Mainstreaming gender into drafting NHDRs

### GHD Analysis

#### **a) Necessary connections: applying the gender and human development approach**

As noted in part I above, a GHD approach demands that NHDRs analyse both the causes of gender-differentiated human development outcomes, as well as the impact that these differences have not only on women and men, but on the prosperity and well-being of the nation as a whole. Moreover, the achievement of gender equality should not only be examined as a goal in itself, but also as an important prerequisite for overall human development. The links between the overall development situation and incidences of discrimination against women and men are, for the most part, still absent from human development analyses, including NHDRs.<sup>5</sup>

The approach, or theoretical conceptualization of the relationship of gender to human development, plays a significant role in determining the types of policy recommendations that might emerge and the overall usefulness of the analysis. Whether discussing gender-specific issues or mainstreaming gender into other policy areas, this type of analysis is critical in order to ensure any policy impact by NHDRs. Concrete and practical advice for developing such analysis is explained in box II.2 below.

#### **Box II.2: Three rules-of-thumb for applying GHD analysis in NHDRs**

(1) “What-why?” Analysts should point out *what* the disparity is, but more importantly, *why* the disparity exists. This applies in cases where data and statistics on women or data that is sex-disaggregated are mentioned.

For example, simply noting that women represent only 23 per cent of the economically active population does not highlight the important reasons why this disparity exists. Is it due to: cultural prohibitions? direct discrimination within the labour force? limited opportunities caused by low levels of education, poverty, poor health, unpaid work responsibilities? In all cases, data should be used to support claims.

If causes are unknown, hypotheses, according to the principles of gender-based analysis, should be put forward, including the caveat that further research must be undertaken to verify them. For example: “Although no research has been done on the causes of these disparities, low female participation is likely due to both direct discrimination within the labour force structure, as well as pervasive cultural norms that do not encourage women in the remunerated workforce. Further research needs to be undertaken to identify the precise causes of this phenomenon.” This is crucial in terms of educating users of the NHDRs about the chain-reaction effects of gender discrimination and inequality.

(2) “So what?” This rule-of-thumb reminds authors that describing or noting gender disparities should be accompanied by an analysis of their impact on human development.

For example, if girls are discriminated against in terms of allocation of food and education, what impact will this have not only on the girls as they grow older (increased vulnerability, decreased opportunity), but on the development of the nation as a whole? As women represent half of the population, poor health and low education levels of half of the population cannot be without serious overall human development repercussions.

<sup>5</sup> Other ways of classifying approaches differentiate welfare, anti-poverty, equity and empowerment approaches. Rights-based and WED (women, environment and development) approaches are also commonly cited. See *Human Development in South Asia 2000 “The Gender Question”*, pp. 27-29 for further information.

Moreover, explicitly highlighting links between different spheres in which inequalities are manifest is key. This may mean, for example, pointing out how traditional attitudes keep girls from higher education, which is linked to low levels of women in top political positions or to low levels of women in top management in the private sector, which influences women's control over resources.

(3) "What-how?" NHDRs often mention policies, laws, organizations, institutions or other initiatives intended to enhance gender equality or address inequalities. However, while it is informative to mention *what* these might be, it is more instructive to note *how* and *how well* they function in practice.

For example, noting that the constitution prohibits discrimination on the basis of sex, or that CEDAW has been ratified, underscores de jure equality, but de facto equality also needs to be addressed. How are these legal provisions enforced in practice? Why does evidence of discrimination persist if it is "against the law"?

### ***b) A gender and human development analysis includes men***

As noted in part I, a GHD analysis should also examine how men affect and are affected by gender inequality. A holistic approach to gender equality cannot focus only on women.

/ The South Asia 2000 report includes a box ("The Other Gender – Men's Issues in the Development Process") that highlights both men's privilege (e.g., control over resources, women in supporting role, etc.) as well as men's burdens (e.g., absence of emotional outlet or support system, social pressure to conform to the stereotypes, etc.) in a development context. The Benin 1998 NHDR also includes a box addressing men's responsibilities ("Equality is Not Enough – The Role of Men Must be Redefined"). Both of these are good examples of how a GHD discussion should integrate men.

## **Research Methodology and Indicators**

### ***a) Commissioning research***

Due to budget constraints, NHDR teams often have to rely on existing research and data to perform their analysis. However, there may be opportunities to commission sociological surveys or other research to answer specific questions that the NHDR wishes to explore. In these cases, a gender perspective can be mainstreamed into any research by paying attention to the following questions:

- € Will the situation of both genders be researched?
- € Will data be collected, collated and presented in a sex-disaggregated manner?
- € Will methodology be sensitive to both women's and men's particular needs?
- € Is gender understood as an important variable in determining social processes? What baseline assumptions are made about gender roles and relations by the researchers?

Gender-specific NHDRs might consider the possibility of commissioning sociological surveys that can provide important qualitative data on prejudices, stereotypes and attitudes towards gender equality. Any such research should be sure to disaggregate results according to other axes of diversity (see below). Furthermore, NHDRs specifically on gender can take advantage of the possibility to gather information and analysis on issues that remain under-

researched yet crucial to a gender-based approach to human development, such as gender and trade, macroeconomics and globalization, or men and masculinities.

/ Bulgaria 2001: In the preparation of this NHDR, Bulgaria commissioned a specific sociological survey concerning a wide variety of issues related to participation. Because the data was collected and analysed in a gender-sensitive manner, interesting and important hypotheses could be made about the gendered aspects of participation. For example, the responses yielded a correlation between those respondents who actively exercise their rights to civic participation and those who display intolerance towards gender-based violence. While this cross-referencing cannot definitively attribute cause and impact, it takes the analysis beyond mere sex-disaggregation of survey results to highlight links between gender equality and other facets of human development.

### ***b) Indicators measuring gender equality/inequality***

Any research on gender equality from the human development perspective should start from analysis and measurement of gender equality/inequality. The purpose of indicators used in human development reports is to reflect the progress made in expanding the capabilities of all people, men and women. Gender-related indicators address the same goal and provide a snapshot of gender inequalities as well as measure the progress made towards eliminating them. These indicators can be broadly divided into the following categories:

*Quantitative indicators/measurement:* female enrolment in secondary education

*Qualitative indicators:*

- a) *fact:* discrimination against women in the labour market.
- b) *traditions/public opinions:* customary practices preventing women from controlling and inheriting land
- c) *perceptions:* it seems the official indicator on women's share of paid employment (waged and salaried) in non-agricultural activities is inaccurate

/ The SADC 2000 NHDR provides indicator tables that compare various gender-related aspects of development both longitudinally and between Southern African Development Community (SADC) countries. These include not only GDI and GEM, but also tables providing various indicators on gender and economic activity, education, labour profiles, crime, personal distress and governance. The text also notes that "SADC has set a target for women of 30% representation in political and decision-making structures by 2005." The governance table indicators can therefore be used to assess the progress that SADC countries have made towards this goal.

### *Using indices of human development – HDI, GDI, GEM, HPI*

The global *Human Development Reports* have inaugurated a number of innovative indices that are useful for comparing different aspects of human development. These include:

- € Human development index (HDI)
- € Gender and development index (GDI)
- € Gender empowerment measure (GEM)
- € Human poverty index (HPI)

These indices can give us a snapshot of the development situation from various perspectives in a way that is comparable longitudinally and across countries. NHDRs under review, for example, often make use of these indicators, but point out their limitations in the national context.

/ The Pacific 1999 NHDR notes that while such indices are useful at the global level, their use in a national context is compromised by a lack of data, the weak relevance to the national situation and the crudeness of the picture that they present. This report also notes the potentially misleading nature of HDI compared to GDI in Pacific countries: although the GDI are often more favourable, this masks the complexity of gender relations.

/ The Kenya 1999 NHDR notes that the GDI in Kenya is similar to the HDI, despite the documented severe disadvantage of women. It therefore calls for a “more detailed examination of the data utilized in computing the GDI and other related factors to explain this phenomenon.”

While the GDI and GEM, as well as sex-disaggregated HDI and HPI, can be useful for illustrating the extent of gender inequality, highlighting the gaps between the GDI and GEM and the HDI, for example, is important to demonstrate the impact of gender inequality. Large gaps should illustrate how far gender inequality drags down the overall level of human development. Moreover, relatively high macroeconomic indicators (such as GDP) alongside relatively low GEM or GDI measures serve to point out that growth does not guarantee gender equality. Similarly, relatively small gaps in sex-disaggregated HDI or HPI alongside a relatively poor HDI ranking should also highlight that gender gains do not always depend on prosperity.

A quick checklist for using composite indices in either gender-mainstreamed or gender-specific NHDRs might include the following questions:

- € If HDI, HPI, poverty of opportunity index (POPI) or other general indices are used, are they disaggregated according to sex?
- € Are GDI and GEM calculated?
- € Are any limitations of these indices noted in the national context?
- € Are these indices compared to HDI or other overall indicators of development? Are any major disparities analysed (cause and impact)?

/ The Cambodia 1998 NHDR analyses its HDI, GDI and GEM calculations and posits explanations for why its GDI is relatively high, but its GEM relatively low in relation to other Asian countries: “Although women’s participation in the labor force is high in Cambodia, their representation in legislative, management and professional occupations is low.” This NHDR also calculates a sex-disaggregated HPI across economic quintiles, which reveals a crucial observation from a GHD point of view: “The gender disparity in human poverty not only persists across all economic groups, but is actually greater in the richer quintiles than in the poorer quintiles.... This evidence conclusively shows that the gender disparity in human poverty in Cambodia will not necessarily narrow with economic growth and rising consumption standards.”

/ The Benin 1998 NHDR analyses its HDI according to sex disaggregation – this allows us to see that while the HDI for women has increased, the HDI for men has fallen between 1992 and 1996. The report suggests that the change in overall HDI thus reflects efforts to improve the situation of gender equality (although the need to look critically at the situation of men here should not be understated!).

As the inequalities between women and men manifest themselves across a wide range of areas, in a variety of ways and forms that vary significantly from place to place, the NHDR teams should be selective and innovative in order to reflect the national/regional conditions. Although there is a wide range of areas where gender inequalities exist – such as in access to resources and services; de facto and de jure rights in decision-making at the national, municipal and household levels; and the labour market – it is plausible to start research on gender equality and human development by examining basic aggregate indicators that will provide a general picture of the present situation and trends.

**Table II.2 - Some basic indicators reflecting gender equality/inequality**

Area	Specific indicators
Opportunities to live a healthy and long life	Life expectancy at birth (years): male/female Incidence of diseases, by gender Prevalence of HIV/AIDS (per cent of people aged 15-24), by gender
Opportunities to be knowledgeable	Adult illiteracy rate, per cent, by gender, age group, urban/rural Net primary enrolment rate (per cent of age group), by gender Progression to grade five (per cent of cohort), by gender Primary completion rates, by gender
Opportunities to have a decent standard of living	Population total/female population (per cent of total) HDI GDI Total labour force/female labour force Incidences of impoverishment, by gender Gender gaps in earnings Unemployment Total (per cent of total labour force) Female (per cent of female labour force)
Opportunities to participate actively in public life through democratic institutions	GEM Per cent of seats held by women in national parliaments Per cent of seats held by women in local councils/decision-making bodies Per cent of posts held by women in government, by rank, central/local Per cent of women in high-level political party positions Capacity of women and women's organizations to influence decisions concerning the design of public services and infrastructure

***c) Identifying and evaluating causes contributing to gender inequality: qualitative and quantitative techniques***

Once the scope of gender inequalities is recorded, it is important to analyse why gender inequalities persist. What are the factors that contribute? What is the priority ranking of these factors? Although these factors have different natures, it is possible to put them under the following categories:

1. *Lack/limited political will.* Political will is a necessary requirement for achieving gender equality. If governments put achieving gender equality at the heart of their policies, real progress can be achieved.
2. *Failures/limitations in design of public policies, institutional failures.* Although many countries have made tremendous strides in assuring equality of men and women in formal institutions by reforming, for instance, the existing legal frameworks, gender inequalities continue to persist partly because the patterns of public policy-making remain unchanged. Some policy makers tend to ignore the nature of gender inequalities and disregard the impact of such inequalities on overall national human development. These limitations can be resolved by mainstreaming gender into all government policies and programmes.

3. *Culture/traditions.* In some countries, customary and religious laws prevent women from enjoying the same rights and opportunities as men. For example, despite the formal rights to own, control and inherit land and other resources, women's rights are drastically limited as property is usually controlled by men in the family.

Due to the complex nature of the causes of gender inequality, it is often easy to understand them – but harder to measure them. The use of qualitative data and indicators is crucial for NHDR analysis. For example, attitudes and opinions, survival strategies, personal costs of discrimination, self-esteem, pervasiveness of stereotypes and discriminatory attitudes are all crucial parts of the gender equality picture that are often best reflected through qualitative data. Qualitative data can be presented in terms of case studies, personal testimonies, excerpts from transcripts of round tables or community forums, interviews with community members and prominent personalities, excerpts and analysis of media reports and stories, etc.

/ The South Asia 1998 human development report uses the sex-disaggregated POPI to highlight causes of gender equality in a case study of Pakistan: this disaggregation enables crucial observations, such as the fact that the annual reduction of poverty is higher for men than for women, while the male-female disparity index has grown from 100 in 1970 to 116 in 1995. This means that heightened attention should be paid to this “lag” in alleviating women's poverty.

/ The Gambia 2000 NHDR notes that since the establishment of the Women's Bureau in 1980, there have been tremendous increases in the numbers of women in public and private managerial positions, and an increase in girls' school enrolment by almost 20 per cent. This highlights the impact of institutional change.

/ The China 1999 NHDR provides sex-disaggregated tables of average daily time use, according to province and urban/rural differences. This data provides the crucial basis for beginning to analyse important cause and impact connections between gender equality, unpaid labour and macroeconomic implications. It notes, for example, that women spend more than twice as much time as men on housework, yet their paid “working time” almost equals men's.

/ The Kenya 1999 NHDR notes that two participatory poverty assessments were conducted to gather data on human poverty, which revealed, for example, that “men and women view and experience poverty differently. Often, women have lesser access to and control over assets such as land and economic and social services, and more limited participation in decision-making.” This type of information is best revealed through qualitative data.

A single cause of gender inequality is difficult to isolate, as gender inequalities in various sectors or dimensions of life feed off each other, creating a chain or a circle of inequalities that at times seems daunting. This is why it is crucial to trace these inequalities back along the links of the chain, in the hope that the steps necessary for engendering change will

become more clear. In identifying the causes of gender inequality, the NHDR teams may use the indicators presented in table II.3 below.

**Table II.3 - Some indicators reflecting the causes of gender inequalities**

Category	Indicators
Political will	Existence and implementation of national action plan for gender equality GEM Per cent of increase in government expenditures for gender-responsive programmes Per cent of budget allocated in gender-responsive manner
Patterns of public policy-making	HDI GDI Level of public expenditure specifically targeted at enhancing gender equality Incorporation of gender analysis/gender indicators into sectoral policies
Culture/traditions	What are the beliefs concerning women's rights with regard to property ownership? Do women have to get their male relatives' consent in order to open bank accounts/obtain travel documents? Do women have to get male relatives' consent to seek and obtain paid employment? How do stereotypes about "men's work" and "women's work" discourage men from engaging in caring professions (teaching, nursing, social work) or in the unpaid caring economy? How do stereotypes about "men's work" and "women's work" limit access to women in technical professions (e.g., information and communications technology [ICT])? How do stereotypes about "men's work" and "women's work" limit access for women to decision-making positions? Are there forced marriages? Do harmful gender stereotypes persist in media, school books and other materials for public consumption? Do men and women have equal say in making decisions concerning contraceptive practices?

/ Many NHDRs emphasize traditional culture and attitudes as a factor contributing to the unequal status of women in areas such as low economic participation or women's vulnerability to HIV/AIDS. This is one specific "cause" without which analyses of gender inequality are incomplete. The Kenya 1999 NHDR pays significant attention to the role that tradition plays in exacerbating the inequalities women face: negative cultural practices and attitudes are one factor influencing the poverty of rural women, cultural stereotypes help keep women's political participation low, and, in general, "traditional beliefs, taboos and cultural practices in the field of health and tradition have a negative impact on women".

/ The Cambodia 1999 NHDR notes a variety of causes of discrimination against women, for example, weak enforcement of good laws, and the link between men's greater resources and their ability to influence legal judgments. Reasons for discrimination against girls in education are examined in some depth, and the intergenerational link between parental level of education and gender discrimination is made explicit.

#### ***d) Studying the impact of gender inequality on human development***

How does gender inequality contribute to human development? What is the impact of progress made in achieving gender equality on human development? Is it possible to assess cross-sectoral impact?

Although disparities in opportunities – to live a healthy and long life, be knowledgeable and enjoy a decent standard of living, as well as participate in decision-making at the household, municipal and national levels – take their most direct toll on women and girls, the costs of gender inequality affect everyone. Gender inequality is a factor contributing to poverty, low economic growth, high HIV/AIDS rates and lack of good governance. Moreover, gender inequalities in one sector or sphere compound and perpetuate inequalities in other areas.

In order to design policies and programmes for eliminating gender inequality that could have a significant impact on human development, it is vital to select and design gender indicators. Indicators that assess cause and impact are often taken from other spheres (see part III, table III.1 for sample indicators); for example, indicators of labour market inequalities may show the impact of education inequalities. However, assessing impact is always an approximate endeavor, as cause and effect is in most cases impossible to completely isolate. For this reason, the GDI, GEM and sex-disaggregated indices of human development (HDI, HPI, POPI, etc.) are often helpful as “general indicators” that can be used to assess the overall impact of inequalities on human development.

First and foremost, it is important to note that the absence of gender inequality in and of itself points to the failure to achieve sustainable human development. Gender equality must continue to be recognized as an end in itself. At the same time, gender inequalities and disparities present concrete and specific barriers to the attainment of human development goals in all sectors and spheres of life. Explicitly calculating and naming this impact situates gender equality firmly within a human development paradigm, while also highlighting the urgency of addressing these issues.

Table II.4 illustrates some examples of how gender disparities detract from the achievements in various dimensions of sustainable human development. While NHDRs sometimes exhibit significant insight into the impact of gender inequality on women, less attention has been paid to demonstrating the measurable impact of these inequalities on overall indicators of the nation’s human development. Therefore, the examples in column three of the table below, while inspired by discussions in human development reports, have been supplemented by research from other sources. (See also the discussion of human development indices [HDI, GDI, GEM, HPI] below for suggestions on how to estimate the impact of gender inequality on overall human development.) For an extensive sectoral overview of manifestations, cause and impact of gender inequalities across various sectors and issues related to human development, see part III, table III.1.

**Table II.4 - The impact of gender inequality on human development**

Dimensions of human development	Illustration of links between gender inequalities and human development	Specific example
Individual health, welfare and quality of life	<p>↓ Gender discrimination robs individuals of opportunities and weakens their capabilities. Economic disadvantages, health problems, and barriers to education, knowledge and participation are all inextricably linked. Elimination of discrimination improves the lives of individuals, who, one by one, determine the human development profile of a country.</p>	<p>Improving women’s education improves their productivity – both of which enhance the human development profile of the country, while also addressing gender gaps in poverty. For example, in Kenya, lower crop yields by female farmers can generally be correlated to their lower levels of education.* Redressing this inequality would thus impact much more than just education rates.</p>
Human security	<p>↓ The right to be free from violence is a critical aspect of human security. Gender-based violence is a direct violation of this right.</p> <p>↓ While women remain disproportionately economically disadvantaged, their human security remains severely compromised – which undermines human security for all.</p> <p>↓ In peace-building and post-conflict situations, a lack of commitment to women’s concerns and building a gendered peace makes that peace untenable – a threat to human security overall.</p>	<p>Women are particularly susceptible to gender-related violence and domestic abuse, often as the result of social norms that accept male physical dominance and control. This pervasive threat to women’s human security greatly impacts the human development profile of the country, as in addition to suffering great emotional and physical pain, women’s health and capabilities to engage in both productive and reproductive work are severely compromised. In Pakistan, up to 80 per cent of women are subject to some form of domestic violence during their lifetimes.**</p>
Social cohesion	<p>↓ Family support networks are weakened by gender stereotypes that lock men and women into certain roles – these often place a disproportionate burden on women that limit their opportunities, while sometimes isolating men from sources of fulfillment and support within the reproductive sphere.</p> <p>↓ Multiple inequalities due to intersections of gender, age, ethnic or other discrimination greatly weakens community cohesion. True social cohesion must fully integrate all members of a community, which includes women, into all aspects of economic, political and social life.</p>	<p>Traditional gender roles can place dangerous pressure on men: “During economic shocks, such as those in the transition economies of Eastern Europe, rapidly worsening unemployment has produced such high anxiety (especially among men) that alcoholism, suicide, domestic violence and the dissolution of families have risen considerably. These, in turn, have their own impacts on women and children.”*</p>
Governance and participation	<p>↓ Because of their diverse experiences and roles in the community, men and women bring diverse perspectives to governance institutions at all levels. Inequalities in participation and voice limit the potentially transforming power of these institutions.</p> <p>↓ In democratic societies, governance institutions are not credible unless they include the voices of all those they</p>	<p>Broader participation of women appears to improve governance: one study shows that corruption rates fall as the proportion of parliamentary seats held by women rises.* A survey by the Inter-Parliamentary Union (2000) reveals that respondents believe women represent interests of a broader spectrum of society, and put new and different issues on the agenda (for example, a land redistribution law to alleviate</p>

	<p>represent – which means both men and women.</p> <p>↓ Governance for human development demands accountability of decision makers, which includes being accountable for addressing the needs of the entire constituency, including women.</p>	women's poverty in Ethiopia).*
Human rights	<p>↓ The protection and promotion of human rights are necessary prerequisites for human development. Without basic rights, a discussion of choices and opportunities becomes moot. It must be recognized that the most fundamental principles of human rights demand that gender inequality be eliminated. Women's rights are an inalienable aspect of human rights.</p>	<p>With the introduction of an individual land tenure system in Kenya, women's customary cultivation rights were ignored – only an estimated five per cent of Kenyan women own land. This violation of rights has direct human development consequences: lack of ownership and access to land is considered a critical factor causing poverty among female-headed households.***</p>
Efficiency in development planning	<p>↓ Nations cannot afford to ignore the economic and social contributions of both women and men in all spheres. Until gender inequality is eliminated, nations will be prevented from reaching their full development potential.</p>	<p>Recent studies of the Middle East, North Africa, Sub-Saharan Africa and South Asia suggest that gender inequalities in school enrolment impede economic growth.* This thesis is supported by research in Cambodia, which shows that education of girls actually brings higher pecuniary returns****</p> <p>HIV/AIDS, along with the great suffering it brings individuals, has well-documented devastating consequences for a country's economic growth. Correlated studies show that gender inequality in literacy rates has been strongly correlated to accelerated HIV infection rates.* It thus follows that improving women's literacy can help curb the devastating impact of HIV/AIDS.</p>
<p>Sources: *<i>Engendering Development</i> (World Bank, 2001), **<i>Human Development in South Asia 2000 - "The Gender Question</i>, ***<i>Kenya Human Development Report 1999</i>, ****<i>Cambodia Human Development Report 1998 – Women Contribution to Development</i></p>		

#### e) *The impact of human development on gender equality*

Slow and uneven human development exacerbates gender inequalities. Policies that ignore that they have different impacts on gender groups are usually sub-optimal and may be potentially harmful for human development. Policies should therefore incorporate gender analysis and gender sensitive tools to monitor progress, and support women's opportunities in coping with poverty; influencing decision-making at the national, community and household levels; and sustaining fragile ecosystems. Table II.5 lists some questions that can help in mainstreaming gender into human development policies. For guidance in determining indicators that should be considered in a variety of sectors, see part III, table III.1.

**Table II.5 - Mainstreaming gender into human development policies: some important questions to be asked**

<p>Expanding opportunities to live a healthy and long life</p> <p>Health</p> <p>HIV/AIDS</p>	<p>How do gender differences in access to health services limit women/men in terms of opportunities to be knowledgeable and to have a decent standard of living? Will health sector reforms exacerbate gender gaps in access to health services (including service fee issues)? How will this impact not only the health of men and women, but wider opportunities and capabilities? Do policies and laws or practices in the area of reproductive and sexual health put women's health at risk? What are the social, economic and demographic consequences of poor reproductive and sexual health?</p> <p>How does women's increased vulnerability to HIV/AIDS (due to social, physiological and economic factors) exacerbate women's economic disadvantage? What roles do men and women play in caring for individuals living with HIV and AIDS? Are men adequately targeted in reproductive and sexual health interventions? How does this affect their capabilities and opportunities?</p>
<p>Expanding opportunities to be knowledgeable: education</p>	<p>How do gender gaps in school enrolment and literacy rates influence opportunities for employment and participation in public life? How does the education of parents affect gender biases in the raising of children?</p>
<p>Expanding opportunities to have a decent standard of living</p> <p>Poverty</p> <p>Employment</p>	<p>How does economic empowerment (or lack thereof) affect women's and men's opportunities in other sectors? Do household level measurements of poverty hide or distort inequalities in terms of intra-household allocation of resources? Does this distort accepted notions of who is poor that inform policies and other poverty alleviation interventions? Do men and women have different survival strategies in the face of poverty? How do these disparate strategies affect other capabilities and opportunities in their lives? How does unequal access to land rights and ownership affect opportunities for sustainable livelihoods and the incidence of poverty among men and women? How do inheritance or land ownership laws that discriminate against women contribute to women's human poverty?</p> <p>What is the gender composition of the informal labour market? What limitations does work in the informal economy place on women and men? How does occupational segregation (both vertical and horizontal) affect opportunities (career, personal, participation) for both men and women? How do inequalities in the labour market hinder overall development and macroeconomic growth?</p>
<p>ICT</p>	<p>Do gender gaps in "technology literacy" perpetuate gender gaps in other areas, such as certain sectors of the labour force? Does women's marginalization from education and access to technological advancements reinforce their economic vulnerability? Are they further marginalized from benefits of globalization?</p>
<p>Expanding opportunities to participate actively in public life through democratic institutions</p> <p>Governance and</p>	<p>Do women/men perceive that they have greater economic autonomy? Do women/men perceive that they have greater self-respect? What are the programmes promoting women's human rights? What is their impact? Are small numbers of women in political decision-making positions reinforcing stereotypical notions about "women's place" in politics? Does a strong majority of one social group (e.g., men from specific social backgrounds) in government limit potential perspectives that would enhance efficiency and effectiveness of policy-making to address women's concerns?</p>

participation	<p>How does the participation of gender-related NGOs and community-based organizations at various stages of the policy-making process enhance the quality of public policy?</p> <p>How do gender gaps in governance structures undermine the credibility and legitimacy of these structures?</p> <p>How does unequal decision-making in households impact women's participation in political, economic and social life?</p> <p>How do burdens of "double discrimination" affect access to resources and participation in economic, political and social spheres of life for women and/or men in marginalized groups?</p> <p>How is the experience of marginalization different for men and women?</p> <p>How are women organizing to increase their role in decision-making?</p>
Gender considerations should be integrated into sectoral policies	<p>Has gender analysis of policies been institutionalized?</p> <p>Are the gender statistics published on a regular basis?</p> <p>Are protectionist labour market policies towards women increasing discrimination against women in the labour market?</p> <p>Is the non-recognition of unpaid labour preventing women from receiving due social assistance (pensions, unemployment insurance)?</p> <p>How have the changes in national legislation empowered women as opposed to men (e.g., in terms of their control over resources, role in decision-making at the household level)?</p> <p>Are sufficient public funds allocated to address urgent gender problems, such as low secondary school enrolment of girls or relatively high incidence of poverty in female-headed households?</p> <p>Are social justice (including gender equality) issues an important factor in macroeconomic and development planning as well as fiscal policy-making?</p> <p>Has the loss of revenue from tariffs lifted due to trade liberalization increased the burden of social reproduction on women?</p> <p>Are export processing zones exploiting the cheap labour of women? How does this affect their access to sustainable livelihoods and overall human security?</p>
Gender equality and the environment	<p>How does different exposure to environmental hazards affect the health and livelihoods of men and women?</p> <p>How do women take part in decision-making with regard to environmental policies?</p> <p>Do women participate in natural resources management at the local level?</p>
Gender equality and programmes/projects targeting households	<p>Does unequal sharing of reproductive work in the household limit women's opportunities for participation in other areas?</p> <p>Does male non-involvement in family life increase men's psychological vulnerability in times of crisis?</p> <p>Who benefits from resource allocation of both essential and non-essential food items, recreational activities and luxury goods? How does this affect the health and well-being of females and males?</p>
Gender considerations in peace-building and post-conflict situations	<p>Do conflict situations reinforce cultural attitudes about men's right to aggression and use of physical domination over women – including rape and other forms of violence?</p> <p>How do conflict situations increase women's vulnerability to disease, including HIV/AIDS?</p> <p>Do peace-building processes use the opportunity to build a gendered peace – or are women's vulnerabilities and limited economic and political opportunities reasserted?</p> <p>How can tapping into the resources of community groups strengthen human development – particularly in post-conflict situations?</p>
Gender-based violence	<p>What are the personal costs to survivors of gender-based violence (including rape, domestic abuse, harassment)? How does violence impact survivors' economic, social, political and other capabilities and opportunities?</p> <p>What are the social and economic costs of gender-based violence (including weakened capacity in productive and reproductive economies, perpetuation of</p>

	<p>widespread aggression and fear, etc.)?          How does gender-based violence undermine relations of equality and respect in sexual relationships, making women more vulnerable to HIV and AIDS?          How does the acceptance or inadequate response to gender-based violence uphold values, practices and attitudes that are harmful to women and detrimental to the achievement of overall human development?</p>
--	---

**f) Indicators reflecting diversity among men and women**

While a GHD approach begins by identifying disparities between the situation and status of men and women, it is also crucial to remember that neither “men” nor “women” represent homogenous categories. Thus, another pitfall to avoid in a discussion of gender and human development is the tendency to lump all women or all men into internally identical groups. Undoubtedly, while certain common trends in a country might be documented among women (for example, lower wages for equal work) or among men (for example, lower life expectancy), both women and men are heterogeneous categories. Other factors that can introduce great disparities between groups of women, or groups of men include:

- € age
- € race and ethnicity
- € regional or rural/urban differences
- € class or social status
- € level of education
- € culture and/or religion

Such differences may be very significant for the design and implementation of human development interventions. For example, some NHDRs note urban/rural or provincial differences in the GDI composite measure (e.g., Cambodia 1998, China 1999, Viet Nam 2001). This is helpful and instructive for analysing differences not just along gender lines, but cross-referenced with other socio-economic factors.

/ In the South Asia 2000 human development report, an excellent theoretical discussion of diversity is presented in two different sections of chapter 2: “Diversity – In Theory and Practice” and “South Asian Women – A Useful Category?” It states, for example: “There are three important ways in which ‘South Asian women’ must be considered as heterogeneous: inter-community diversity (i.e., differences based on the community in which women live), intra-community diversity (based on demographic, family, class and other factors) and inter-temporal diversity (i.e., differences that result from progressive changes in society and women’s environment).... Throughout this report, we maintain that the diversity of South Asian women’s experience must inform both analysis of issues and policy recommendations.”

**g) Overcoming the paucity of gender-related data: innovative analysis of existing data**

*“A lack of quality, gender-disaggregated data remains a major obstacle to gender-sensitive policy-making throughout South Asia.” (South Asia, 2000).*

In attempting to mainstream gender or analyse specific gender-related issues, NHDR teams are often faced with a lack of data: either the issue of concern has not been researched in-depth, or research has not been conducted in a gender aware manner, thus precluding an analysis of results according to gender. Many NHDRs reviewed in preparation for this note mention these obstacles. Commissioning data (see above) is one option, but not always feasible due to resource constraints. In lieu of this, analysts should try to make use of existing data, applying a GHD analysis in innovative ways.

/ The Cambodia 1998 NHDR innovatively uses data to highlight the human aspects of poverty: it notes that while survey data show that female-headed households (FHH) in the rural areas are not disadvantaged in comparison to male-headed households (MHH) in terms of their per capita consumption levels, “this does not rule out other dimensions in which rural FHH might be worse off than MHH. For example, in most traditional societies, FHH have lower social status than MHH.” Moreover, the Cambodia NHDR also examines the significance of intra-household resources. While noting the methodological difficulties of assessing this, “proxy” calculations are used that relate variations in household consumption expenditure to variations in household composition. The results suggest that (a) males receive significantly larger allocations of discretionary food items than females and (b) that men 25 and older make significantly greater demands than comparably aged women on the household clothing budget. This information shows the true “face of poverty”, which cannot be revealed through household level income and consumption surveys.

Innovative use and analysis of existing data can also overturn stereotypes about gender and prove that investment in women and girls pays off.

/ The Cambodia 1998 NHDR uses quantitative data to combat gender stereotypes: It notes that girl children are often taken out of school by their parents because of the assumption that educating girls is not a “good economic investment”. However, by analysing the pecuniary returns of education for both men and women, it reveals that they are in fact higher for girls.

At the same time, care should be taken when analysing existing data: certain research design and data collection methodologies may hide or distort important gender considerations.

/ The South Asia 2000 report points out problems related to large-scale surveys (i.e., census, national sample survey) in accurately reflecting women’s role and status in the economy. These include: cultural restrictions that mean questions are only directed to the male head of the household; inadequate attention given to unpaid labour; a male bias against women’s work; poorly constructed questionnaires; and an ambiguous definition of labour force participation.

#### ***h) Including necessary gender-related information in technical and other annexes***

The UNDP Corporate Policy on NHDRs mandates that reports include a detailed annex comprised of technical notes, definitions of statistical terms, and other references and

materials relevant to the analysis and presentation of the report. In terms of gender, the following issues should be considered in the preparation of such annexes:

- € Are definitions and culturally relevant explanations provided for key concepts and terms related to the GHD approach in an annex or a glossary?
- € Are indices such as the HDI, GDI, GEM, HPI or POPI explained? Are they, or can they be, sex disaggregated? Is the importance of sex disaggregating these indices noted?
- € Are any complex data analysis methodologies that highlight gender disparities explained?

These points are important for ensuring the credibility of your gender analysis.

/ The Kenya 1999 NHDR begins its chapter “Gender and Human Development” with an explanation of what gender equality means in the Kenyan context. This is important, as policy makers sometimes claim that gender equality advocacy is a “western import” or a “feminist campaign” that has little to do with the cultures and traditions or development priorities of the national context. The report’s “Glossary of Terms” also explains how “gender” should be understood, and explains the composite GEM and GDI measures. Methodological notes on the calculation of these indices are included in the appendix.

### **Policy Recommendations**

As stated in the Corporate Policy on NHDRs, “conclusions arising from the data and the analysis should, when possible, be translated into policy options and broad recommendations.” Moreover, “in some cases, particularly where urgent action is required or consensus is already emerging, implementation strategies and plans of action should accompany such recommendations.”

Worldwide experience and practice has noted that in order to achieve sustainable gender equality, action and change is demanded on various fronts. The specific objectives and scope of such action will necessarily be determined by the national context. However, NHDRs on gender should in general terms be seeking to articulate recommendations that:

- € ensure and promote de jure (legal) equality between men and women
- € ensure and promote de facto (actual) equality between men and women

Moreover, to ensure a gender and human development perspective, recommendations should seek to:

- € address root causes of gender disparities (including traditions, attitudes and cultural practices)
- € address the interconnected nature of gender inequality across different sectors and spheres of life
- € advocate for changes of approach to development planning frameworks and macroeconomic policies so that gender equality is considered – i.e., they should advocate for the transformation of overarching structures, rather than focusing only on micro-level change

### **Box II.3: A three-part strategy to promote gender equality**

In 2001, the World Bank published a comprehensive policy report on gender and development entitled *Engendering Development: Through Gender Equality in Rights, Resources and Voice*. Its concluding chapter outlines a three-part strategy for change:

1. *Reform institutions to establish equal rights and opportunities for men and women, including:*
  - ↓ establishing equal rights and protections under the law
  - ↓ establishing incentives that discourage discrimination by gender
  - ↓ designing service delivery to facilitate equal access
2. *Foster economic development to strengthen incentives for more equal resources and participation*
3. *Take active measures to redress persistent disparities in command over resources and political voice, including:*
  - ↓ promoting gender equality in access to productive resources and earnings capacity
  - ↓ reducing the personal costs to women of their household roles
  - ↓ providing gender-appropriate social protection
  - ↓ strengthening women's political voice and participation

Additional challenges for policy makers, as outlined in this report, include:

- ↓ sharpening policy through gender analysis
- ↓ addressing emerging issues (including the spread of HIV/AIDS and globalization) in light of gender equality
- ↓ broadening partnerships with civil society groups, donors and others in the international community

This chapter is an extremely useful guide to NHDR teams for formulating relevant, specific and efficient policy options.

#### **a) Gender-mainstreaming policy recommendations**

For general recommendations that are not specifically about eradication of gender discrimination, gender concerns should nonetheless be mainstreamed. This might entail:

- ∄ being specific about the participation of both men and women in decision-making positions of any policy initiative
- ∄ explicitly noting the gender of target groups of policy initiatives (is there a need to target men or women specifically?)
- ∄ alternatively, explicitly stating that men and women should be equally targeted by any policy initiative
- ∄ including gender as a factor when mandating special attention to inter-group disparities
- ∄ including enhanced gender equality as a criterion of success of any recommended policy initiative, particularly as concerns macroeconomic and overall development policies

#### **b) Gender-specific policy recommendations: objectives**

UNDP policy documents on gender equality, primary documents of the Fourth World Conference on Women and other widely cited literature on gender equality all note that true achievement of gender equality requires a multi-level and cross-sectoral approach (see part

l). Until inequalities are addressed in their multiple cross-cutting dimensions, sustainable gender equality will remain elusive.

It follows that policy recommendations presented in NHDRs on gender will necessarily be dependent on the objectives and issues covered in the respective report; in all likelihood proposed strategies will speak to a variety of interconnected and codependent recommendations for change. Table II.6 below summarizes the main objectives that recommendations are likely to address, questions that can help NHDR teams in formulating these recommendations, as well as examples from the NHDRs reviewed. Note that this table does not present recommendations according to sector, but rather types of strategies needed to engender change.

**Table II.6 - Policy recommendations for achieving gender equality**

Objectives of gender-specific recommendations	Examples of questions to ask in formulating recommendations	Examples from NHDRs*
1. Enhancing legislation to reduce gender inequalities and guarantee de jure gender equality	<ul style="list-style-type: none"> <li>↓ Is a review of current legislation from a gender perspective needed?</li> <li>↓ Are amendments required?</li> <li>↓ Do new laws concerning specific gender issues (e.g., violence against women) need to be drafted?</li> </ul>	<p>“Review discriminatory laws and encourage progressive interpretation by judges who have been made gender sensitive through training.”</p> <p>“Family law must be applied equitably. Compulsory primary education laws must be enacted and strictly enforced.”</p>
2. Enhancing government policies and programmes to reduce gender inequalities and promote de facto gender equality	<ul style="list-style-type: none"> <li>↓ Is a review of current policy from a gender perspective needed?</li> <li>↓ Are amendments to policy (including macroeconomic policy and budgets) required?</li> <li>↓ Do new policies concerning specific gender issues need to be drafted?</li> </ul>	<p>“Accessible and cost-effective facilities for higher education and distance education should be made available to women.”</p> <p>“Health facilities that serve the specific needs of women need considerable improvement.”</p>
3. Improving gender sensitivity in data and research	<ul style="list-style-type: none"> <li>↓ Are major gaps in data preventing reliable gender analysis and the formulation of policies to enhance gender equality?</li> </ul>	<p>“A sex-disaggregated accurate database of information on women’s economic activity must be established for analytical and policy-making purposes.”</p> <p>“Collect and analyze data disaggregated by sex to identify gender disparities.”</p>
4. Promoting accountability through the establishment of targets and goals for gender equality	<ul style="list-style-type: none"> <li>↓ What are the goals or targets governments should aim to achieve and in what time frame? (Refer to international commitments and goals where appropriate.)</li> </ul>	<p>“The critical threshold of 33 per cent of seats must be reserved for women in all legislative, judiciary and executive bodies.”</p>
5. Enhancing participation and governance in support of gender equality	<ul style="list-style-type: none"> <li>↓ Where and how does participation of women (or men) or gender experts need to be enhanced?</li> <li>↓ Is the creation of advisory boards or consultative processes necessary to ensure a gender perspective in economic, political, community or other processes?</li> </ul>	<p>“Affirmative action principles should be applied in hiring female teachers.”</p> <p>“Civic and political leaders and opinion makers should set role model examples in their personal behaviour promoting gender equality.”</p>
6. Supporting awareness raising, education and communication on gender equality issues	<ul style="list-style-type: none"> <li>↓ Given the importance of traditional practices, taboos, attitudes and stereotypes, what sort of information campaigns or educational activities are needed?</li> <li>↓ What is needed to establish public and stakeholder support for pro-gender equality initiatives?</li> <li>↓ How should information and education activities target specific stakeholders of social groups?</li> </ul>	<p>“Gender-sensitization training for male parliamentarians, judges, civil servants and members of local governments must be implemented.”</p> <p>“A massive campaign of education and awareness raising on gender throughout the country and particularly in rural areas should be mounted.”</p> <p>“Society must be convinced that no efforts to increase girls’ education will succeed unless the status of women in society is raised.”</p>

7. Capacity-building	↓ What sort of training and capacity-building initiatives are needed for policy makers, legislators, the judiciary, teachers, etc., in order to enhance gender equality in specific spheres?	“The capacity-building of women in governance structures, in all sectors at all levels, should be enhanced through training and access to information.” “The court system needs to be strengthened to enforce laws prohibiting discrimination.”
8. Advocacy of a GHD approach	↓ What sort of awareness raising or research activities need to be undertaken in cooperation with policy analysts to ensure a GHD approach in policy-making processes? ↓ What shifts need to occur in development and macroeconomic planning frameworks to promote gender equality?	“Recognize and account for the contribution of women to economic production.” “Reducing inequality and enhancing women’s productivity should be integral elements of the country’s development strategy.”
9. Focusing priorities for non-governmental interventions and donors	↓ What gender priorities should non-governmental sources of funds address? ↓ How can NGOs and community-based organizations support governmental initiatives and vice-versa?	“The report calls for strengthening of women’s organizations and other civic groups to empower women and enable them to play a greater role in national development.”
10. Targeting and including men	↓ What is needed to convince various stakeholder groups, including men, that gender equality is not a “women’s issue” in the traditional sense? ↓ In what ways do policies or other initiatives need to focus on the vulnerabilities of men?	“Men in positions of power and other opinion makers should set a positive example in their personal behaviour.”

\* Due to variations in the format of NHDRs under review, some of the cited recommendations are presented in concluding “Recommendations” chapters, while others are taken from the main text.

### ***c) Formulating recommendations to maximize effectiveness and policy impact***

Gender equality is not a “simple” issue to address, nor will gender inequalities be eradicated overnight. To ensure their usefulness to politicians and policy makers, recommendations should:

- € Be specific and concrete: This increases the potential policy impact of NHDRs, as policy makers are more likely to be hooked by concrete suggestions, particularly if gender sensitive public policy is new to them. Recommendations should highlight precisely what sort of “groundwork” needs to be undertaken (in terms of research or awareness raising, for example) to ensure successful implementation of policy or legislative solutions.

/ The South Asia 1998 report includes estimated budgetary requirements for the fulfillment of its main recommendation – a five-year plan for improving the state of education in South Asia. This type of specificity and concreteness is invaluable to policy makers seeking guidance from NHDRs.

- € Be innovative and creative: Despite long-time grass-roots activism and initiatives, cross-sectoral public policy research and analysis on gender equality is a relatively new area of scholarship *and* practice. This means that “best practices” and “tried and true” methods of tackling gender inequalities through a policy framework are still to be consolidated. Recommendations therefore need to offer new ways of approaching these challenges.
- € Highlight successful initiatives: At the same time, recommendations should also highlight examples of successful initiatives – including both civil society efforts and regional or international experiences – to be adapted. Given the widespread lack of information and understanding about gender inequality (as highlighted in many of the reports under review), recommendations can raise awareness about the concrete types of solutions that have succeeded elsewhere to address this multi-faceted development challenge.

The recommendations presented in both columns of table II.7 below are inspired by those presented in the NHDRs under review. These suggestions cannot be prescriptive, as the precise details of both challenges and solutions will depend on the country experience.

**Table II.7 - Formulating effective policy recommendations**

GOOD	BETTER
“Reduce women’s economic vulnerability.”	“Innovative efforts need to be made to move women out of gender-segregated employment and into non-traditional occupations for women.” Or: “Job creation for women must be made a public policy priority and should be linked to political accountability. In other words, the female workforce should be acknowledged as a constituency.”
“Increase participation of women in political decision-making positions.”	“Conduct a study on the feasibility and acceptability of different quota or affirmative action approaches for increasing female participation in political decision-making positions. This could include study visits by parliamentarians to countries such as France and Sweden to analyse very different approaches to addressing this issue.”
“Gender equality needs to be taken into consideration in the formulation of macroeconomic policy.”	“A gender-responsive budget review should be undertaken to assess the extent to which prioritization and allocation of public resources are promoting or hindering gender equality. Recommendations from such a review should be fed into the next national budget-making process.”
“Increase the number of women represented in Parliament.”	“Increase the number of women represented in Parliament to at least 35% in the next general election through amendments to the party-list system and voter education.”
“Commission research on women and poverty.”	“Undertake a participatory assessment of the impact of poverty and of feasible poverty alleviation strategies that make explicit the different situation and needs of men and women (being sure to note social group and rural/urban or other significant differences).”

### **II.3 Considering gender in the editing, revision and finalization of NHDRs**

Most NHDRs undergo an extensive editing process of several drafts before publication. It is unlikely that at this stage entire chapters will be added or that the overall approach to the report will be amended. (That is why it is crucial for gender experts to participate in the conceptualization, planning and drafting stages of the report).

Particularly in cases where gender issues have not been analysed as the main theme of specific chapters or sections, a gender expert could be invited to review the final draft. Bearing in mind the unlikelihood of major amendments or revisions, the following changes could nonetheless be suggested and made at this stage:

- € GDI and GEM, if calculated, could be added and explained.
- € Case studies or examples that pertain specifically to gender issues could be added.
- € Language could be edited to be gender sensitive.
- € If the data is available, tables could present statistics in a gender-disaggregated way, with accompanying analysis.
- € Analysis could be refined to highlight potential GHD impact.
- € An expert could ensure that gender-related issues highlighted in the text figure among the conclusions and recommendations.

In cases where gender has been addressed as a specific theme, revision and editing of the report should ascertain:

- € Has a GHD analysis been used: are the causes and impact of gender disparities noted and analysed?
- € Have adequate explanations of technical gender-related terms and concepts been offered – either in the text or technical annexes?

### **II.4 Considering gender in post-production aspects of NHDRs**

As noted in the Corporate Policy on NHDRs, sustained follow-up to the production of the reports is one of the six basic principles underpinning the success of NHDRs. This includes development and implementation of a communications strategy for wide and proactive dissemination, which should engender critical review and elaboration of the main messages of the reports.

Some issues to consider related to gender include:

- € Are spokespeople or others who present the NHDR to the media or in other public forums prepared to discuss the gender implications of the findings and recommendations?
- € Do any media materials (press packets, summaries, etc.) highlight the gender aspects of the report?
- € Are any forums organized where civil society, media, policy makers and other stakeholders can debate the gender equality aspects of the report?

- € Do evaluations of the NHDR's quality and impact address and include gender equality issues?
- € Are comments from gender experts or gender-related civil society organizations recorded and fed back into the conceptualization and planning stages for the next NHDR?

## SECTION III: SECTORAL AND DEVELOPMENT INDICATORS

In order to assure the positive impact of human development policies on gender equality, it is necessary to integrate gender-sensitive indicators in designing human development policies. Table III.1 gives examples of such indicators. It draws on the NHDRs under review, but is necessarily supplemented by information from other sources. These indicators would allow monitoring of the impact of specific sectoral policies on achieving gender equality.

**Table III.1 - Gender indicators**

Sector of human development	Sub-sector	Gender indicators
Expanding opportunities to live a healthy and long life	Status of health	Fertility rate, per cent Gender disaggregated data on: a) Life expectancy b) Nutritional status/nutritional intake c) Immunization rates d) Morbidity/mortality e) Alcohol-related illnesses f) Tobacco-related illnesses g) Other diseases including cancer, cardiovascular disease, mental illness, sexually transmitted diseases (STDs), etc. h) Health implications of gender-based violence
	HIV/AIDS	People living with HIV/AIDS, by gender Gender differences in risk factors Spread of prostitution/forced prostitution Distribution of reproductive burden associated with care of people living with HIV and AIDS, by gender Gender gaps in morbidity rates due to AIDS-related causes Gender gaps in STD prevalence rates Gender gaps in access to anti-retroviral drugs Correlation of prevalence rates between different gender and age groups (high prevalence rates for girls and older men indicate inter-generational sex) Per cent of women who are afraid to insist on safe sex in their marriages Existence of gender-sensitive programmes to prevent HIV/AIDS
	Access to health services	Average expenditure of female/male headed households on health Availability and access to prenatal and postnatal services Births attended by skilled health staff (per cent of total) Gender gaps in access to health services in terms of: a) mobility in accessing health services providers b) access to information on health, nutrition and sanitation
	Policies in health sector	Share of women in decision-making bodies of health sector Gender implications of health sector reform Existence of women's health policy and implementation monitoring mechanisms

Expanding opportunities to be knowledgeable	Status of education	Adult illiteracy rate, per cent, by gender, age group, urban/rural Non-formal/functional literacy rates by gender, age group, urban/rural Completed level of education, by gender Gross enrolment ratio, per cent, by gender, field of study Enrolment and completion rates in vocational and professional education institutions, by gender
	Access to education	Average household expenditure of female/male headed households on education Burden of reproductive work on girls Gender-disaggregated data on: a) Enrolment rate b) Drop-out rate c) Failure rate Non-completion rates due to pregnancy and marriage Gender gaps in access to scholarships/free education
	Quality of education	Progress in eliminating gender stereotypes in school curricula/teaching materials Existence of teacher training programmes on gender issues Existence of gender segregation in the teaching profession Per cent of female teachers Per cent of female college and university professors
Expanding opportunities to have a decent standard of living	Poverty	National situation HDI GDI HPI Population below poverty line, per cent, by gender, urban/rural (various poverty lines and methodologies can be used) Recognition and calculation of contribution of reproductive work to the economy  Household level Gender gaps in intra-household allocation of resources Gender gaps in time use (for remunerated and non-remunerated work, leisure, education) Gender variations in consumption patterns Gender differences in coping and survival strategies
	Access to social services	Gender-focused analysis of distribution of social security benefits: a) Pension/retirement benefits b) Sick leave rights c) Insurance for accidents and invalidity  Institutionalization of state and corporate responsibilities in ensuring family friendly workplaces and working conditions

	Employment	<p>GDI</p> <p>Employment/unemployment rates by gender, age group, marital status, public/private service, various sectors of economy</p> <p>Gender distribution in wage labour in nonagricultural sector</p> <p>Part-time workers, per cent, by gender</p> <p>Participants in formal and informal labour markets, by gender</p> <p>Gender differences in time use (productive labour, reproductive labour, child care, recreation and self-improvement)</p> <p>Hours of household labour, by gender, marital status</p> <p>Existence of satellite accounts or other means to calculate contribution of unpaid work and importance of caring economy</p> <p>Presence and spread of gender discriminatory practices in setting wage levels and making personnel decisions</p> <p>Existence of vocational counseling and placement service for women</p> <p>Existence of policies and programmes supporting women entrepreneurs</p> <p>Existence of policies and programmes to enhance self-reliance of women with disability</p> <p>Existence of policies and programmes to protect women in informal sectors</p> <p>Existence of programmes/projects addressing gender issues with regard to immigrant workforce</p> <p>Incidences of sexual harassment and violence in the workplace</p>
	ICT	<p>Data disaggregated by gender, age group, urban/rural on</p> <ol style="list-style-type: none"> <li>a) Access to public ICT facilities</li> <li>b) Private ICT users</li> <li>c) Computer literacy rate</li> <li>d) ICT professionals</li> <li>e) Students enrolled in ICT vocational training programmes</li> </ol> <p>Beneficiaries of ICT for development projects and interventions, by gender</p> <p>Existence of policy to close gender gaps in ICT</p>
Expanding opportunities to participate actively in public life through democratic institutions	Legal framework	<p>Existence of National Action Plan for Gender Equality</p> <p>Presence of affirmative action for increasing the number of women in government decision-making bodies</p> <p>De jure control over land, credit, household income and livestock (for example, existence of laws ensuring equal inheritance rights/right to property ownership for women)</p> <p>Existence of equal employment opportunity law</p> <p>Existence of legislation for preventing sexual harassment at work</p> <p>Existence of legal provisions for parental leave (paid/unpaid)</p> <p>Existence of adequate legislation, policy and programmes to combat gender-based violence</p> <p>Legal barriers to gender equality within the family (e.g., decision-making, control over resources, responsibility for household work and child-rearing)</p> <p>Existence of reproductive rights that allow women to control family size</p> <p>Existence of programmes/projects addressing specific social integration challenges facing men/women from marginalized groups (ethnic/religious minorities, youth, the elderly, the disabled, people living with HIV/AIDS)</p>

	Implementation of the laws/public policies	<p>Integration of gender considerations into poverty alleviation plans; macroeconomic, trade and state budget policies</p> <p>Budgetary allocations to programmes promoting gender equality</p> <p>De facto control over land, credit, household income and livestock (for example, changes in per cent of property controlled and owned by women/men)</p> <p>Existence and effectiveness of policies that support female household heads with low income (e.g., credit programmes for women in poverty)</p> <p>Number of discrimination cases reported</p> <p>Number of cases related to women's rights heard in courts, and their results</p> <p>Prosecution rates for discrimination cases</p> <p>Increase/decrease in violence against women/men</p> <p>Rate at which the number of national/local justices/prosecutors/lawyers who are women/men is increasing/decreasing</p>
	Participation in decision-making	<p>National/municipal level</p> <p>GEM</p> <p>Per cent of seats held by women in national parliaments</p> <p>Per cent of seats held by women in local councils/decision-making bodies</p> <p>Per cent of posts held by women in government, by rank, central/local</p> <p>Per cent of women in high-level political party positions</p> <p>Capacity of women and women's organizations to influence decisions concerning the design of public services and infrastructure</p> <p>Number of NGOs advocating for women's and girls' rights</p> <p>Active members of NGOs and community-based organizations, by gender</p> <p>Per cent of union members who are women</p> <p>Per cent of women in decision-making positions within unions</p> <p>Participants in public protests and political campaigning, by gender</p> <p>Household level</p> <p><i>Gender differences in decision-making within households, such as</i></p> <ul style="list-style-type: none"> <li>a) Gender roles with regard to decisions on food distribution</li> <li>b) Gender roles in making decisions on spending money on health care</li> <li>c) Gender roles in decisions over contraceptive practices/fertility decisions (e.g., number of children)</li> <li>d) Gender roles in making independent small/large purchases</li> </ul> <p>Incidence of domestic violence</p> <p>Prevalence of cultural and traditional biases regarding gender roles in productive and reproductive work</p>

Environment		<p>Presence of gender analysis of environmental policies</p> <ul style="list-style-type: none"> <li>a) Integration of the fact that women and men are affected by environmental pollution and degradation into national environmental policies/programmes</li> <li>b) Integration of the fact that women and men have different knowledge and approaches to protecting the environment into national environmental policies/programmes</li> <li>c) Integration of needs, concerns and priorities of women into the process of designing and implementing environmental policies and projects</li> </ul> <p>Per cent of women in environmental decision-making bodies  Existence of training programmes for women farmers in environmentally sound technology  The role of women, especially of indigenous women, who have specific knowledge of local fragile ecosystems, in natural resource management  Participation of women and women's organizations in the design and management of recycling programmes</p>
Violence		<p>Existence of laws and/or policies for addressing gender-based violence  Officially reported and actual incidences of gender-based violence (domestic and sexual violence per 100,000 people)  Sexual harassment in the workplace, per cent experiences, by gender  Existence of support structures for survivors of violence  Public perceptions of violence  Existence of legislation preventing sex tourism and trafficking in people</p>
Peace-building and post-conflict situations		<p>Ensuring the negotiation and implementation of a "gendered peace"  Per cent of women in peace-related decision-making  Existence of programmes of reintegration of ex-combatants  Existence of programmes for refugee and displaced women  Existence of programmes/projects addressing gender-based violence in conflict situations</p>

# ANNEXES

## Annex I: List of NHDRs Reviewed

NHDRs reviewed for this paper were categorized into two groups:

A: Those that have an explicit focus on gender (gender-specific)

B: Those that do not have an explicit focus on gender (gender-mainstreamed)

Reports in the first group were identified by the NHDR Unit and provided to the consultant.<sup>6</sup> Reports in the second group were selected semi-randomly, ensuring representation of each of UNDP's geographical regions.<sup>7</sup> Limitations on prospective samples included availability (only reports accessible on the Internet were selected) and language (only reports in English). It is therefore recognized that while the sample may not be typical of all NHDRs ever produced, the review nonetheless elicited certain commonalities in terms of attention to gender issues. It should be noted that group A contained three sub-regional reports, while group B contained one sub-regional report. To keep things simple, however, this report refers to its object of study as "NHDRs".

### A: NHDRS with a specific focus on gender

Country	Year	Title
1. Benin	1998	<i>Human Development Report</i>
2. Cambodia	1998	<i>Human Development Report – Women's Contribution to Development</i>
3. Egypt	1995	<i>Human Development Report</i>
4. Kenya	1999	<i>Human Development Report</i>
5. Pacific Islands	1999	<i>Creating Opportunities</i>
6. South Asia	2000	<i>The Gender Question</i>
7. South Asia	1998	<i>Human Development Report (Education)</i>
8. Togo	1999	<i>Rapport sur le developpement humain durable – Femme, pauvrete, environnement</i>
9. Turkmenistan	1997	<i>Human Development Report</i>

<sup>6</sup> In addition to the NHDRs reviewed here, the Bangladesh and Philippines NHDRs were also identified by the NHDR Unit as having an explicit focus on gender. Unfortunately, copies of these reports were not available for review.

<sup>7</sup> It should be noted that this division may at times seem arbitrary: some NHDRs in group A represent more of a "mainstreamed" than explicit focus on gender, and in this respect, they are very similar to some NHDRs reviewed in group B. Nonetheless, this categorization was adhered to in the analysis of the reports

**B: NHDRs without a specific focus on gender:**

Country	Year	Title
1. Bhutan	2000	<i>Gross National Happiness and Human Development</i>
2. Bosnia Herzegovina	2000	<i>Youth</i>
3. Bulgaria	2001	<i>Citizen Participation in Governance – From Individuals to Citizens</i>
4. China	1999	<i>National Human Development Report</i>
5. Egypt	1998/ 1999	<i>National Human Development Report</i>
6. Gambia	2000	<i>National Human Development Report</i>
7. Guyana	1996	<i>National Human Development Report</i>
8. Kazakhstan	2000	<i>Fighting Poverty for a Better Future</i>
9. SADC	2000	<i>SADC Regional Human Development Report</i>
10. Somalia	1998	<i>National Human Development Report</i>
11. Viet Nam	2001	<i>Doi Moi and Human Development</i>

## Annex II: Checklist for Producing NHDRs with a Specific Focus on Gender

<p>Conceptual development and planning</p>	<ul style="list-style-type: none"> <li>↓ Priority themes related to gender identified and linked to overall national development priorities</li> <li>↓ Gender experts with necessary qualifications identified (e.g., macroeconomic expert, budget expert, etc.)</li> <li>↓ Any necessary briefing or training of the drafting team (i.e., in new directions for analysis) is anticipated and planned for</li> </ul>
<p>Drafting (research and writing)</p>	<ul style="list-style-type: none"> <li>↓ Key GHD concepts are clarified in a manner appropriate to the national context (in introduction, glossary or annex)</li> <li>↓ Attention to gender equality in terms of the macroeconomic and overall development context is analysed</li> <li>↓ “What-why?” and “so what?” gender analysis applied to identification of gender disparities</li> <li>↓ “What-how?” gender analysis applied to mention of gender responsive laws, policies and programmes</li> <li>↓ GDI and GEM are used or adapted and explained in terms of impact on gender inequalities</li> <li>↓ Qualitative data used to illustrate manifestations, cause and impact of gender inequalities</li> <li>↓ Useful and relevant indicators used to show manifestations, causes and impact of gender inequality, and are accompanied by textual explanations</li> <li>↓ Men’s issues are considered and reflected where appropriate</li> <li>↓ Significant differences between groups of women or between groups of men are highlighted and analysed</li> <li>↓ Significant lack of gender-related data and research is made explicit</li> <li>↓ Policy recommendations are as specific as possible and summarized</li> </ul>
<p>Finalization and editorial process</p>	<ul style="list-style-type: none"> <li>↓ Guidelines and checklists (such as presented in this report) are referred to in order to ensure that a GHD approach has been used and that necessary links and connections between various sections of the report are explicit</li> <li>↓ Report reviewed by “non-gender” human development expert to ensure clarity and understandability of concepts and analysis</li> </ul>
<p>Post-production: evaluation and follow-up</p>	<ul style="list-style-type: none"> <li>↓ Gender expert participates in any review or evaluation processes</li> <li>↓ Report disseminated among gender stakeholders and their input actively sought</li> <li>↓ Concerns regarding gaps in attention to gender issues are fed back into subsequent NHDR planning and conceptualization</li> </ul>

### Annex III: Checklist for Mainstreaming Gender into NHDRs

<p>Conceptual development and planning</p>	<ul style="list-style-type: none"> <li>↓ Gender expert participates in brainstorming and conceptual planning</li> <li>↓ Key literature on relevant issues as they pertain to gender is consulted*</li> <li>↓ GHD (rather than WID) approach is endorsed</li> <li>↓ Specific priority areas in terms of gender equality are noted and consensus reached on where they should be integrated into the report</li> <li>↓ Need to include specific chapter on gender issues is considered</li> <li>↓ Terms of reference of authors/drafting team(s) explicitly note requirement to mainstream a GHD approach</li> <li>↓ Any specifically commissioned research specifies a requirement to investigate gender disparities in the TOR</li> <li>↓ Necessary briefing or training of drafting team on GHD concept is anticipated and planned for</li> </ul>
<p>Drafting (research and writing)</p>	<ul style="list-style-type: none"> <li>↓ Gender issues reflected in “overviews” of the development situation</li> <li>↓ GHD and related concepts are clarified (in the introduction or annex)</li> <li>↓ Indices (e.g., HDI, HPI) and statistical data are disaggregated according to sex wherever possible and accompanied by textual analysis</li> <li>↓ GDI and GEM explained and used</li> <li>↓ “What-why?” and “so what?” gender analysis applied to identification of gender disparities</li> <li>↓ “What-how?” gender analysis applied to mention of gender-responsive institutions, laws, policies and programmes</li> <li>↓ Qualitative data used to illustrate manifestations, cause and impact of gender inequalities</li> <li>↓ Useful and relevant indicators used to show manifestations, causes and impact of gender inequality, and are accompanied by textual explanations</li> <li>↓ Significant differences between groups of women or between groups of men are highlighted and analysed</li> <li>↓ Significant lack of gender-related data and research is made explicit</li> <li>↓ Specific conclusions and policy recommendations related to gender issues are drafted</li> </ul>
<p>Finalization and editorial process</p>	<ul style="list-style-type: none"> <li>↓ Gender expert provides review of report from a gender perspective</li> <li>↓ Gender issues integrated into executive summary, introductory chapters or overviews, and conclusions/recommendations</li> <li>↓ Does the NHDR use gender-sensitive language?</li> <li>↓ Guidelines and checklists (such as presented in this report) are referred to in order to ensure adequate mainstreaming of gender issues</li> </ul>
<p>Post-production: evaluation and follow-up</p>	<ul style="list-style-type: none"> <li>↓ Gender expert participates in any review or evaluation processes</li> <li>↓ Report disseminated among gender stakeholders and their input actively sought</li> <li>↓ Concerns regarding gaps in attention to gender issues are fed back into subsequent NHDR planning and conceptualization</li> </ul>

\* See references in annex IV.

## Annex IV: Additional Resources and References

On human development, composite measures and other analytical tools:

, For more information on the human development approach, see *Analytical Tools for Human Development* at: [www.undp.org/hdro/anatools.htm](http://www.undp.org/hdro/anatools.htm).

/ For more information on the GDI and GEM, see *Human Development Report 1995*.

/ For more information and concrete tools on Gender Mainstreaming, see: Neimanis, A.. 2001. *Gender Mainstreaming in Practice: A Handbook*. New York: UNDP/RBEC.

On international commitments:

, You can view the Beijing Platform for Action on-line at: [www.un.org/womenwatch/daw/beijing/platform/](http://www.un.org/womenwatch/daw/beijing/platform/).

On specific issues and concepts:

*Gender definitions:*

, Edit Tuboly and Roben Penny. *Guidelines for Conducting a Working Session to Introduce the Concept of Gender*: [www.undp.org/seed/unso/women/guide.htm](http://www.undp.org/seed/unso/women/guide.htm).

/ Caroline O. N. Moser (1993) *Gender Planning and Development. Theory, Practice and Training*. London: Routledge.

/ Organisation for Economic Co-operation and Development/Development Assistance Committee (OECD/DAC). 1999. "DAC Guidelines for Gender Equality and Women's Empowerment in Development Cooperation."

Indicators and international databases:

, UNDP. *Mainstreaming Gender Equity Programmes, Identification of Gender Disaggregated Indicators*: [www.mgep.org.np/gender/indicators.html](http://www.mgep.org.np/gender/indicators.html).

/ Canadian International Development Agency (CIDA). 1997. *Guide to Gender-Sensitive Indicators*.

, Demographic and Health Surveys: [www.measuredhs.com/](http://www.measuredhs.com/).

, CIDA's *Policy on Gender Equality*: [www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca).

Department for International Development (DFID). *Poverty Elimination and the Empowerment of Women: Strategies for Achieving the International Development Targets*: [www.dfid.gov.uk/Pubs/files/tsp\\_gender.pdf](http://www.dfid.gov.uk/Pubs/files/tsp_gender.pdf).

/ United Nations Development Fund for Women (UNIFEM). 2000. *Targets and Indicators: Selections from Progress of the World's Women*.

, United Nations Statistical Division. Statistical Web site: [www.un.org/depts/unsd](http://www.un.org/depts/unsd). *UN Statistical Yearbook*.

/ United Nations Educational, Scientific and Cultural Organization (UNESCO). *UNESCO Statistical Yearbook*.

, International Labour Office (ILO): [www.laboursta.ilo.org](http://www.laboursta.ilo.org). *ILO Labour Statistics Yearbook*.

, World Income Equality Database, United Nations University, World Institute for Development Economic Research (WIDER). [www.wider.unu.edu/wiid/wiid.htm](http://www.wider.unu.edu/wiid/wiid.htm).

, World Bank Gender Statistics. GenderNet Web site: [www.genderstats.worldbank.org](http://www.genderstats.worldbank.org).

, Organization for Economic Co-operation and Development (OECD). Statistics for OECD and developing countries: [www.oecd.org](http://www.oecd.org)

#### *Macroeconomic analysis:*

/ *World Development: Special Issue on Growth, Trade, Finance and Gender Inequality*. Guest editors C. Grown, D. Elson and N. Catagay. July 2000.

/ Catagay, N. "Engendering Macroeconomics and Macroeconomic Policies." UNDP Social Development and Poverty Elimination Division (SEPED) Working Paper #6.

#### *Budgets:*

, UNIFEM resources on gender responsive budgets: [www.unifem.undp.org/gender\\_budgets/analysis.html](http://www.unifem.undp.org/gender_budgets/analysis.html)

, Cagatay, N., M. Keklik, R. Lal and J. Lang. "Budgets As if People Mattered: Democratizing Macroeconomic Policies." UNDP SEPED Conference Paper Series #4: [www.undp.org/poverty/publications/conf\\_pub.htm#Series%204](http://www.undp.org/poverty/publications/conf_pub.htm#Series%204).

#### *Men and masculinities:*

, For further information, see UNDP resources and information on men and gender equality at: [www.undp.org/gender/programmes/men/men\\_ge.html](http://www.undp.org/gender/programmes/men/men_ge.html).

#### *Gender and poverty:*

, UNDP's SEPED Web site on gender and poverty, complete with links to many resources: [www.undp.org/poverty/initiatives/genpov.htm](http://www.undp.org/poverty/initiatives/genpov.htm). Also see five papers on gender and poverty produced by SEPED in collaboration with the United Nations Research Institute for Social Development (UNRISD) at: [www.undp.org/poverty/publications/#SEPED%20Collaboration%20with%20UNRISD](http://www.undp.org/poverty/publications/#SEPED%20Collaboration%20with%20UNRISD).

, "Gender and Poverty." SEPED Working Paper:

[www.undp.org/poverty/publications/wkpaper/wp5/index.htm](http://www.undp.org/poverty/publications/wkpaper/wp5/index.htm).

, “Gender and Poverty: An Analysis for Action” UNDP monograph:  
[www.undp.org/gender/resources/mono2.html](http://www.undp.org/gender/resources/mono2.html).

/ “Gender and Poverty.” In *Engendering Development*, pp. 61-72. Washington, D.C.: World Bank, 2001.

## Annex V: Planning a Gender-Specific NHDR

The structure of an NHDR establishes the user-friendliness of the document, and frames the material in a way that not only highlights priorities but also frames the parameters of the debate. While there is no single “correct” formula for structuring an NHDR on gender, the following presents suggested components:

- ↓ Executive summary: An executive summary including brief summaries of the approach, main observations and conclusions of the report, as well as a summary of main recommendations can make the NHDR more user-friendly. The intersections and interconnectedness of gender inequalities should be highlighted.
- ↓ A conceptual outline of the GHD approach: The GHD approach should be explained and contextualized according to the culture, traditions and situation of the country.
- ↓ Overview of the development situation: An overview of past trends and the current development situation increases user-friendliness. Gender considerations should be highlighted throughout.
- ↓ Gender and human development indicators: The GDI, GEM and sex-disaggregated calculations of the HDI, HPI, POPI or other indices provide useful statistical “snapshots”. Limitations of these indices should be highlighted and the significance of any major differences between them should be explained. Measurable indicators of key inequalities should be developed and presented. A “balance sheet” of progress and challenges is a useful way to present qualitative data.
- ↓ In-depth discussion of gender dimensions and key human development related issues: Chapters will focus on key priority areas for gender equality. These should be explicitly framed in terms of overall national development, as this helps challenge stereotypical notions about “women’s issues”. Connections between areas of inequality should be explicitly drawn.
- ↓ Main conclusions and policy recommendations: The concluding chapter should summarize main observations and key challenges for the future. It should also provide as specific as possible policy recommendations.
- ↓ Annexes: These could include a glossary of key terms, technical annexes (detailed explanations of methodology and other data-related information) and statistical tables (sex-disaggregated tables of main indicators in all areas of development, preferably disaggregated according to region/province and other factors, where appropriate).

## Annex VI: Selected Commitments of Governments Related to Women's Economic Empowerment (Copenhagen, Beijing)

Commitments related to macroeconomic and trade policy	<ul style="list-style-type: none"> <li>↓ regulate markets and mitigate “negative impacts posed by market forces”</li> <li>↓ monitor the impact of trade liberalization on progress in meeting basic needs in developing countries</li> <li>↓ disseminate information on the impact of trade and investment liberalization on the economy</li> </ul>
Commitments to eradicating poverty	<ul style="list-style-type: none"> <li>↓ develop national policies to reduce overall poverty by the year 1996 and “eradicate absolute poverty by a target date to be specified by each country in its national context”</li> <li>↓ develop a precise definition and assessment of absolute poverty, preferably by 1996</li> <li>↓ adopt and maintain macroeconomic policies and development strategies that address the needs of women in poverty</li> <li>↓ revise laws and administrative practices to ensure women’s equal rights and access to economic resources</li> <li>↓ provide women with access to savings and credit mechanisms and institutions</li> <li>↓ develop gender-based methodologies and conduct research to address the feminization of poverty</li> </ul>
Commitments to promoting micro-enterprise as a form of sustainable livelihoods for women	<ul style="list-style-type: none"> <li>↓ governments are to promote and strengthen micro-enterprises, new small businesses, cooperative enterprises, expanded markets and other employment opportunities, and facilitate their transition from the informal to the formal sector</li> <li>↓ governments, central banks and private banking institutions are to encourage regulatory reforms that support financial institutions’ efforts to meet the financial needs of enterprises run by women</li> <li>↓ commercial banks and the private sector are to reduce transaction costs, redefine risk, open lending to women, simplify banking practices, and ensure the participation of women clients in the decision-making process of credit and finance institutions</li> <li>↓ international development organizations are to provide credit for women’s enterprises</li> </ul>
Commitments to women’s equal access to land and other property	<ul style="list-style-type: none"> <li>↓ to make legislative and administrative reforms to give women equal rights with men to economic resources, including access to ownership and control over land and other forms of property</li> <li>↓ to “remove all obstacles...to their ability to buy, hold and sell property and land equally with men”</li> </ul>
Commitments to women’s employment rights	<ul style="list-style-type: none"> <li>↓ enact and enforce laws and measures to eliminate discrimination against women employees on grounds of sex, age, marital or family status, regarding access to and conditions of employment, training, promotion, maternity leave and social security, as well as legal protection against employers requiring proof of contraceptive use or sexual and racial harassment or dismissal due to pregnancy</li> <li>↓ extend labour standards and social protection and create social security systems for part-time, temporary, seasonal and home-based workers without destroying the ability of the informal sector to generate employment</li> <li>↓ change policies that reinforce the gender division of labour to promote equal sharing of family responsibility for unpaid domestic work</li> </ul>

Commitments to measuring and valuing unpaid work	<ul style="list-style-type: none"><li>↓ devise statistical means to “recognize and make visible” women’s unpaid work</li><li>↓ develop methods to reflect the value of such work in quantitative terms for “possible reflection” in core national accounts</li><li>↓ examine the “relationship of women’s unremunerated work to the incidence of and their vulnerability to poverty”</li></ul> <p>Source: <i>Progress of the World’s Women</i> (UNIFEM, 2000)</p>
--	---

## **Annex VII: Glossary of Key Terms and Concepts for Analysing Gender and Human Development**

In many countries, analysis of gender and human development is impeded by the fact that the concepts and terms this analysis calls for are unfamiliar to policy makers and the general public. NHDRs can be used as a platform for clarifying such terms and exemplifying their practical use. Some key terms include but are not limited to:

**Gender relations:** The social relationships and power distribution between the sexes in both the private (personal) and public spheres.

**Gender equality:** Equality exists when both men and women are attributed equal social value, equal rights and equal responsibilities, and have equal access to the means (resources, opportunities) to exercise these.

**De facto and de jure gender equality – De jure equality** (sometimes called formal equality or “paper governance”) refers to equality under the law. De facto equality refers to equality in practice.

**Direct and indirect discrimination:** Direct discrimination is a deliberate act (and its result) that favours one sex over the other. Indirect discrimination results from social, economic, political, cultural or other practices that create a situation of inequality. Both need to be addressed.

**Gender disparities:** These are differences between men and women in respect to their status, situation, rights, responsibilities or other attributes. Also known as inequality of outcome, disparities are not always the result of gender discrimination (e.g., women’s ability to bear children), but in most cases, seemingly “natural” disparities are often the result of direct or indirect discrimination.

**Reproductive labour:** This refers most often to work in the domestic sphere or other caring work (often done by women) that is performed without pay or the expectation of pay, and is not calculated as part of the gross domestic product. It involves the maintenance of social and family structures upon which productive labour depends. It is also referred to as social reproduction.

**Gender-responsive analysis:** Also referred to as gender-sensitive analysis, this (a) takes any data disparities between genders into account and (b) analyses these disparities according to established sociological (or other) theories about gender relations.

## Annex VIII: Note on Gender and Poverty – Approaches and Methodology

Poverty alleviation is a top priority for UNDP. In the words of Mark Malloch Brown, UNDP Administrator, “Getting an anti-poverty strategy right on the ground is now at the heart of all our interactions as a development community.” While all aspects of human development in relation to gender are worthy of rigorous analysis in NHDRs, it follows that explicit attention should be paid to poverty. As poverty alleviation increasingly emerges as the main criterion for the analysis of all aspects of human development, it is vital that the gender dimensions of poverty are integrated in these analyses.<sup>8</sup>

In the first place, it is crucial to recognize that because of their different social roles, men and women experience poverty differently. This means:

- € Men’s and women’s poverty is often caused by different overall factors.
- € The impact of poverty for men and women often differs.
- € Men and women often adopt different strategies to cope with poverty.

It follows that the way that NHDRs define and approach poverty will greatly influence the extent to which gender can be appropriately understood in this context. A very narrow understanding of poverty (as income poverty, for example) will not reveal the complex interplay of factors that create gender inequality, and will make it impossible to formulate policy solutions that address gendered aspects of poverty. This is why NHDRs must adopt a “human poverty” approach that looks at the denial of opportunities and choices, or “capabilities” for leading the most basic “tolerable” life. This will facilitate a better appreciation of how gender affects poverty through an examination of issues such as poverty of decision-making power, poverty of time, poverty of means to self-determination. These are all capabilities that are greatly influenced by one’s gender. Investigations of poverty should thus also move beyond a sole focus on outcome (“who is poor?”) to look at processes of poverty (“why are they poor?”).

Another related consideration here is methodology used to measure poverty: the way we measure poverty will determine what is made visible by our inquiries. One of the greatest problems here is the scarcity of data needed for a gender-based analysis of poverty. This includes a lack of necessary economic and social data that examines the gendered nature of poverty. Moreover, a gendered analysis of the processes of poverty demands not only social and economic indicators, but also qualitative sociological data, of which we have even less.

One way in which this problem often manifests itself is by focusing on poverty at the household level. While a disaggregation of poverty indicators for male- and female-headed households is useful for comparing incomes and analysing the vulnerabilities of female bread-winners in society, this approach neglects differences within households that contain both men and women (and boys and girls). Optimally, households should be analysed as locations of both tension and cooperation, where the family is interpreted as a “contradictory

---

<sup>8</sup> The below theoretical explanations are adapted from *Gender Mainstreaming in Practice: A Handbook*. UNDP/RBEC, 2001. See this handbook for additional references.

institution through which power, affective relations and resource distribution are played out at the micro level.”<sup>9</sup>

The fact that individual levels of poverty for men, women, boys and girls cannot be determined from household income and expenditure surveys (or from sociological surveys of only household-heads) must be taken into account, and alternatives should be sought.

---

<sup>9</sup> L. Beneria and S. Bisnath, p. 14.

## BIBLIOGRAPHY

*This bibliography includes books and documents cited in this paper. Additional references are mentioned in Annex IV. Full references of NHDRs reviewed and cited in this review are contained in Annex I.*

Beneria, L., and S. Bisnath. 1996. "Gender and Poverty: An Analysis for Action." Gender in Development Programme (GIDP) Monograph Series #2. New York: UNDP.

Greig, A., M. Kimmel and J. Lang. 2000. "Men, Masculinities and Development." GIDP Monograph Series # 10. New York: UNDP.

Marchand, M. and J. Parpart. 1995. "Exploding the Canon: An Introduction." In *Feminism/Postmodernism/Development*. New York: Routledge.

United Nations. 1995. *Beijing Platform for Action*.

United Nations. 1997. *The Report of the Economic and Social Council*.

United Nations. 2000. *Final Resolution of the 23<sup>rd</sup> Special Session of the General Assembly: Beijing +5*.

United Nations Development Fund for Women (UNIFEM). 2000. *Progress of the World's Women*. New York: UNIFEM

United Nations Development Programme (UNDP). 1995. *Human Development Report*. New York, Oxford University Press.

United Nations Development Programme (UNDP) and the Bureau for Development Policy (BDP). 2001. *Engendering Development: UNDP Strategy for Gender Equality*. Draft.

\_\_\_\_\_. 2001. *UNDP Thematic Trust Fund Document on Gender*. New York: UNDP.

United Nations Development Programme (UNDP) and the Human Development Report Office (HDRO). 2001. *UNDP Corporate Policy on NHDRs*. New York: UNDP.

World Bank. 2001. *Engendering Development: Through Gender Equality in Rights, Resources and Voice*. New York: Oxford University Press.

Young, K. "Gender and Development." 1997. In *The Women, Gender and Development Reader*, edited by N. Visvanathan, L. Duggan, L. Nisonoff and N. Wiegiersma. New Jersey, Zed Books.