CONCEPT NOTE

Introduction

Human development is about people realizing their potential, increasing their choices, and enjoying the freedom to lead lives they value. However, those options remain unavailable to women as disadvantages and discriminations, in terms of social norms and values, institutions, and public policies, exist in every sphere of women’s lives, limiting their capabilities, opportunities, and choices. As a result, human development cannot reach its optimal level. Thus, gender equality and women’s empowerment are particularly critical to human development.

Measuring gender disparities in human development is an important task for monitoring progress on status of women in terms of capabilities, opportunities, and empowerment. The 1995 Human Development Report (HDR) introduced the first composite measures of gender disparities - the Gender-related Development Index (GDI) and Gender Empowerment Measure (GEM). Addressing the shortcomings of these indices, a new Gender Inequality Index (GII) was introduced in 2010, and was complemented with the new Gender Development Index (nGDI) in 2014.

The GDI was developed to capture gender inequalities in an overall assessment of well-being. It uses the same variables as the HDI. The difference is that the GDI adjusts the average achievement of each country in life expectancy, educational attainment, and income in accordance with the disparity in achievement between women and men. The GDI has frequently been misunderstood as a direct measure of gender inequality. Instead, it is a measure of how much gender inequality reduces a country’s level of human development.

The GEM was introduced as a complementary measure of women’s empowerment in political, economic, and decision making power. It concentrates on three main dimensions (1) power over economic resources measured by unadjusted real GDP per capita income (PPP $); (2) participation in economic decision-making measured by women and men’s share of administrative or managerial positions and professional or technical jobs; (3) access to political opportunities and participation in political decision-making measured by male and female shares of parliamentary seats. However, the GEM is not a measure of gender equality in itself. It makes an odd combination of variables that measure relative female power and variable that evaluates the absolute income level per capita. The GEM has mainly been criticized for only including elitist aspects of women’s empowerment.

The GII reflects a loss due to gender inequalities in potential achievements in three dimensions --- reproductive health, empowerment, and labour market participation. The GII is similar in method to the
Inequality-adjusted Human Development Index (IHDI); in addition, it is association-sensitive so that it captures the overlapping disadvantages across dimensions. The complex functional form and aggregation procedure may limit the index’s usefulness.

The 2014 HDR complemented the GII with a novel measure of sex-disaggregated HDIs. The nGDI is the ratio of the HDIs calculated separately for females and males using the same methodology as in the HDI. It is a direct measure of gender gap showing the female HDI as a percentage of the male HDI.

**Measures of gender equality by other entities**

Over the years, many other organizations and institutions have proposed various other composite indices for measuring gender equality and women’s empowerment.

The World Economic Forum publishes the **Global Gender Gap Index (GGGI)** annually from 2006-2014. The GGGI measures the gender disparities in four critical areas: (1) economic participation and opportunity, (2) educational attainment, (3) health and survival, and (4) political empowerment. All indicators are expressed as female to male ratios and are truncated at one as equity benchmark. Its methodology makes it easy for understanding and communication. However, the large number of components and the complex weighting procedure may generate problems of interpretability and comparability over time.

The OECD Development Center publishes the **Social Institutions and Gender Index (SIGI)** starting in 2009. The SIGI assesses gender disparities, focusing on social institutions that have an impact on the equality between women and men. It is a composite measure of the underlying drivers of gender inequality across countries. The five main dimensions considered for evaluation are: (1) discriminatory family code, (2) restricted physical integrity, (3) son bias, (4) restricted resources and assets, and (5) restricted civil liberties. A key criticism of the SIGI is that confusion in interpretation can occur due to the combination of different sorts of indicators. Limitations to data availability and measurement limit the country coverage of this index.

The Social Watch introduced the **Gender Equity Index (GEI)** in 2004. The GEI focuses on the concept of gender disparities and evaluates countries’ performance in average score in three dimensions: (1) education, (2) economic participation, and (3) women empowerment. Its key conceptual innovation was the inclusion of the measures of women’s well-being and empowerment. However, the shortcoming of this index is that it only allows for comparison of the degree of inequality between countries without reflecting the absolute levels of gender inequality at the country level.

**Need for revisiting the gender indices**

Although significant progress has been made over the past decades, women in every society still are disadvantaged and face various kinds of disparities and discriminations. Such disadvantages and discriminations have changed forms over time and across societies and in many cases, they have become subtle. In that context, lots of research and explorations have gone into finding ways of measuring the breadth and depth of gender inequality and women’s disempowerment. Various
frameworks, methodologies, and indicators have been put on the table. All these become also highly relevant as 2015 is the twentieth anniversary of the Beijing Platform of Action for gender equality and women’s empowerment.

Furthermore, 2015 marks the twentieth anniversary of the HDR gender composite indices, in fact, the first of its kind in measuring gender disparities in different dimensions of human development. The 2016 HDR will also venture to revisit the concept as well as the measures of human development.

Given all these, the time has come to review the gender related composite indices that HDRs have worked on over the years. The proposed expert group meeting provides the HDRO to initiate such a process.

**OBJECTIVES OF THE EXPERT GROUP MEETING**

- To review various composite gender-related indices in the HDRs and beyond, identifying the strengths and weaknesses of relevant measures.
- To discuss and rethink about what barriers and disadvantages against women ought to be considered in the measurement of disparities in opportunities.
- To discuss what new and emerging data sources might be included to help strengthen the way in which gender indices capture gaps in capacities between women and men.
- To facilitate the exchange of knowledge and best practices in promoting the use and development of the high quality socioeconomic policy relevant indicators.
- To present and discuss new ideas and proposals for the revision of gender indices, with particular aims of improving the methodology for measuring gender disparities in human development.

**EXPECTED OUTCOMES**

A set of recommendations on:

- What sort of gender-related composite indices may be relevant in the context of human development.
- What would be the methodological angles and what types of data would be required. How to explore new and emerging data that might enrich existing measures of gender inequality and women’s empowerment.
- How to innovatively bring quantitative and qualitative measures together to broaden policy debate.
- How to implement the proposed changes.

**STRUCTURE OF THE MEETING**

The expert group meeting will be held as a two-day event on 18-19 of June 2015 in Iceland at UNU-GEST, and will feature presentation of one or two basic paper presentations, followed by interactive discussions. An agenda for the event will be drafted in due course.
PARTICIPANTS

Approximately fifteen participants will come from a range of areas – expert in gender indices, statisticians familiar with gender data, advocacy groups, and policy makers.