

Key Terms in Gender Assessments

Sex and Gender

The statement that gender is not synonymous with sex is now widely accepted if not wholly understood. Where **sex** refers to the biological characteristics that define males and females primarily (but not exclusively) according to reproductive capabilities or potentialities, **gender** refers to

the economic, social, political and cultural attributes and opportunities associated with being male and female....The nature of gender definitions (what it means to be male and female) and patterns of inequality vary among cultures and change over time.¹

Sex is therefore a universal and unchanging set of categories while gender is a socially defined category that changes over time and that expresses characteristics and roles associated with certain groups of people with reference to their sex and sexuality.

The implication of this distinction is that gender differences and the categories that they correspond to should not be assumed but investigated, since they will vary both from one context to another as well as one time period to another. Investigation does not necessarily require primary data collection. A vast literature and network of experts exists, largely but not solely in the social sciences, documenting gender relations in most cultural settings and identifying key gender constraints for development.

Gender Analysis and Gender Assessments

Gender Analysis refers to the socio-economic methodologies that identify and interpret the consequences of gender differences and relations for achieving development objectives as well as the implications of development interventions for changing relations of power between women and men. It describes the process of collecting data on gender issues and analyzing that data. An examination of gender differences and relations cannot be isolated from the broader social context.

A **Gender Assessment** is a term that is often used synonymously with gender analysis. While it ordinarily involves carrying out a gender analysis on one or more specific topic, it has also recently, been used to describe the process of reviewing the institutional capabilities of an organization to identify the need for and carry out gender analyses within its programs, and the organization's ability to monitor gender issues throughout the program cycle.

¹ OECD: Paris. 1998. DAC Guidelines for Gender Equality and Women's Empowerment in Development Co-operation, page 12-13.

Gender-Based Constraints

Gender-based constraints are factors that inhibit either men's or women's access to resources or opportunities of any type. They can be formal laws, attitudes, perceptions, values, or practices (cultural, institutional, political, or economic). Customary laws dictating that men can own land is a gender-based constraint on agricultural production and/or economic growth since it can prevent women from producing and/or marketing crops or obtaining credit for other enterprises when land is required as collateral. A law that prevents pregnant teenagers from attending school is a gender-based constraint since it disadvantages girls relative to boys in obtaining an education, and lowers their chances of gaining employment. An HIV/AIDS program that is located in an ante-natal clinic could be a gender-based constraint that inhibits men from getting tested, if a man would be embarrassed to be seen among pregnant women to whom he is neither married nor related.

Gender Equality

Gender Equality² refers to the ability of men and women to have equal opportunities and life chances. A recent World Bank policy report on gender identifies three dimensions as “equality under the law, equality of opportunity..., and equality of voice (the ability to influence and contribute to the development process)” (2001: 3). As stated in the DAC guidelines on gender (1998),

the emphasis on gender equality ...does not presume a particular model of gender equality for all societies and cultures, but reflects a concern that women and men have equal opportunities to make choices about what gender equality means and work in partnership to achieve it.³

Gender equality is a US government endorsed goal of development and development cooperation efforts. It is Goal 3 of the Millennium Development Goals: “Promote gender equality and empower women.” (see http://www.developmentgoals.org/About_the_goals.htm).

Gender equality does **not** mean that resources or benefits must be split 50-50 between men and women.

Gender Equity

Gender Equity refers to a “fair distribution of resources and benefits between men and women according to cultural norms and values.”⁴ Equity is therefore harder to measure in objective terms, and, because it is based on locally-specific definitions, it

² ~~Gender equity is sometimes used~~ synonymously with gender equality, but the latter term has become increasingly preferred.

³ OECD: Paris. 1998. DAC Guidelines for Gender Equality and Women's Empowerment in Development Co-operation, page 13.

⁴ Caroline Taborga et al “Gender Glossary” Rome, Italy: World Food Programme.

varies across countries, and it can be used to describe situations in which women are still significantly disadvantaged relative to men. For example, a situation in which women inherit less than men do, but in a way that is “fair” in local terms, could still be described as equitable.

Gender Integration

Two other terms, gender integration and gender mainstreaming, refer to the process working towards the goal of gender equality. **Gender Integration** involves identifying and then addressing gender differences and inequalities during program or activity design, implementation, monitoring, and evaluation. Since the roles and relations of power between men and women affect how an activity gets carried out, attending to these issues on an on-going basis should both achieve more sustainable development outcomes and also achieve greater gender equality. Experience has shown that sustainable changes are not realized through activities focused on women alone. Gender integration is often enhanced through the use of participatory methodologies.

Gender integration involves not only carrying out a gender analysis as part of the planning process of programs or activities as well as ensuring that appropriate indicators are included in project implementation.

Gender Mainstreaming

Where gender integration has come to refer to the program or activity level, **gender mainstreaming** is more inclusive and goes beyond looking at gender in specific programs. It includes incorporating gender dimensions explicitly into all levels of development effort, including policy formulation, planning, evaluation, budgeting, and decision-making procedures. The term, adopted by the 1995 Fourth World Conference on Women in Beijing, addresses the institutional arrangements that are needed to achieve gender equality. Gender mainstreaming requires that gender issues cannot be treated separately from other development efforts.⁵

Gender integration and gender mainstreaming assume that the goals of gender equality should be expressed in both an organization’s own structure as well as its activities. In practice, the organization’s activities usually – but not always – involve a focus on women because they are more often in a subordinate position in society, but that focus emerges out of an understanding of unequal relationships rather than unequal roles. Recent research interest in the construction of masculinities is also expanding and the issue of addressing men in gender and development programming is becoming increasingly important.⁶

Most development agencies have over the past twenty years shifted from a terminology of “women in development” (WID) to “gender and development” (GAD).⁷

⁵ Gender integration is not always distinguished from mainstreaming, but may be used synonymously.

⁶ For a critical approach to this subject, see Sylvia Chant and Matthew Gutmann, 2000, Mainstreaming Men into Gender and Development: Debates, Reflections, and Experiences. UK: Oxfam.

⁷ For an early overview of this shift, see Eva Rathgeber, 1990, “WID, WAD, GAD: Trends in Research and Practice” *The Journal of Developing Areas* 24: 489-502; a more recent review was carried out by

USAID continues to reference the office that addresses gender issues as the Office of Women in Development, but its orientation is consistent with a gender and development approach. Although the terms are often used interchangeably at USAID, there is a conceptual difference, outlined in the following quotation, which also leads to a practical difference:

A WID focus does not analyze the reasons behind differences in access to resources, services, and opportunities between men and women in a given society or group. It simply designs projects so that these differences are compensated for when necessary. A gender focus identifies the reasons for these differences and their consequences on individuals (men and women), households, communities, and economic development in general, and attempts to modify their negative impact.⁸

Sex-disaggregated data

The ADS makes reference to the collection of sex-disaggregated data for indicators and targets. As noted earlier, sex is a universally consistent variable, while gender categories vary across time and space. Disaggregating data by sex also permits valid cross-country comparisons. Gender analysis of the sex-disaggregated data can be carried out to determine what impact development activities have on gender relations. *Note: some donors do refer to “gender-disaggregated” data.*

Shahrashoub Razavi and Carol Miller, 1995, “From WID to GAD: Conceptual Shifts in the Women and Development Discourse.” Occasional Paper No. 1. UN Fourth World Conference on Women. UNRISD.

⁸ Murphy, Josette 1995 Gender Issues in World Bank Lending. Washington, D.C.: World Bank, pg. 23.