



This section of the Introduction provides an overview of key concepts used in the Trainer's Guide. It will give you essential background you can draw on for training sessions. For example, you can use the material for briefings, handouts and quick guides, or as starting points for discussions and exercises. You can use it to develop context-specific checklists or materials. The concepts are summarised in the table at the end of the section. They are also covered more fully in the GMS manuals and their glossaries.

The key concepts are:

- sex and gender
- gender division of labour
- practical and strategic gender needs
- development approaches
- frameworks for gender analysis and planning

These concepts come with a warning. Gender is not a 'technical fix'. Knowing about these concepts and even applying them will not transform gender relations. These are signposts to the key issues, not guidelines in themselves. They offer insights into gender relations, but they are only as good as the information collected, and thus rely on the quality of the data collection methods. How they are used depends on the policy context of the organisation using them, and the end goals.

4.1 Sex and gender

Sex refers to the biological differences between male and female.

"Gender is a term used to refer to the socially constructed characteristics that define and relate to male and female ways of being and behaviour within specific contexts. Gender also refers to the web of cultural symbols, normative concepts, institutional structures and internalised self-images which, through a process of social construction, define masculine and feminine roles and articulate these roles within power relationships." (GMS manual: Gender Mainstreaming in Development Planning Appendix: glossary of terms)

"Essentially, the distinction between sex and gender is made to emphasise that everything women and men do, and everything expected of them, with the exception of their sexually distinct functions (childbearing and breast-feeding; impregnation) can change, and does change, over time and according to changing and varied social and cultural factors." (Williams et al, 1994)

Key points

- Most elements of the identities (the activities, roles, behaviours, attitudes and beliefs) of women and men are not fixed biologically. They are not natural or universal but are socially and culturally determined. Since the make-up of gender identities is learned according to prevailing norms, it varies widely across societies and cultures.
- What is learned can be unlearned, and new things can be learned. Thus gender identities can change. They can change gradually over time in response to political, economic and broader cultural changes, or they can change suddenly in periods of upheaval.
- Both gradual and sudden change threaten the status quo in any society. In the context of universal male domination, gender identity shifts that open up opportunities for women are usually strongly resisted by men, as well as by women who protect the status quo. 'Backlash' to women's strategic advancement has been widely documented. Women's gains can be lost.
- Because gender as a concept contains a challenge to societal norms for women and men, the term itself can be contested and resisted by both women and men.
- Because gender identity is internalised by both women and men, questioning it can be threatening to both sexes, at deep levels.

Is it natural?

Many societies hold that it is 'unnatural' for women to do things considered 'natural' for men, such as rough contact sports like rugby or wrestling; or for them not to do things like care for children and enjoy home-making, which are considered 'natural' for women. Certain kinds of work may be considered 'natural' for men in some cultures, like work in construction or the financial sector, because men are seen as physically stronger and more rational. Work in the caring professions may be considered to be more suited to women, who are seen as more patient and emotionally responsive. But these ideas have been changing rapidly, and are not the same in all societies.



Questions to ask

- What is considered 'natural' for women and for men in your culture/society? What is the basis for these ideas?
- How can the difference in what is considered to be 'natural' in various societies be explained?
- What accelerates changes in gender identities and the division of labour? What makes them stick? What does this tell us? (For example, during wars or struggles for national liberation, women may be encouraged to work in factories or drawn into liberation armies, then expected to go back to the kitchen or subordinate positions afterwards, when no longer needed.)

Activities on gender

- **Quick wheel exercise.** Form two concentric circles. People move around and talk to the person opposite for one or two minutes on selected questions. Examples:
 - Should boys play with dolls?
 - Should women and men have separate toilets?
 - Do children need their fathers?
 - Why are there so few women world leaders?
 - Do women and men have different sex drives?
 - Are men better at working with machines than women?
 - Are women less violent than men?
- **Your experience of sex and gender.** Draw on participants' own society's attitudes and personal experiences. Brainstorm some examples of sex and gender. Then ask the group to pair up and reflect on aspects of their gender roles they feel comfortable and uncomfortable with, and why. When did they first become aware of their gender identities?
- **Designer babies.** You can now choose the sex of your child through reproductive technology – there are also traditional ways you can try to do this. Ask women and men in the group to choose which sex they would like their child to be, and why. Explore the results in the plenary.
- **Do we stereotype each other?** In single-sex groups, participants list commonly-perceived characteristics of the opposite sex. Each group considers the consequences of these ideas, and presents them in a whole-group discussion. Images and stories can also be used.

4.2 Gender division of labour

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

"In all societies, men and women are assigned tasks, activities and responsibilities according to their sex. The gender division of labour varies from one society and culture to another, and within each culture, it also changes as external circumstances and over time. Because in most societies gender power relations are skewed in favour of men, different values are ascribed to men's tasks and women's tasks." (March et al, 1999)

Key points

- Women's unpaid or low-paid labour, and women's low status, are locked into a vicious circle. Women's status is low because they are in menial, unpaid or low-paid jobs; these jobs are considered menial and not worth paying for because they are women's jobs. Only altering the gender division of labour and the values ascribed will break this circle.
- For these reasons, women's economic activity is under-represented in national accounting, reinforcing the gender-biased perception that men do the majority of the world's work. This runs counter to empirical evidence and UN statistics. The failure to count women's work also undervalues it in relation to men's.
- It is critical to analyse the gender division of labour in any policy or planning process. Classically, failure to do this has resulted in even more work being loaded onto women in development processes. This is why women's reproductive and other unpaid work, and work in the informal sector, must be recognised.
- Women's productive work is often seen as an extension of their reproductive work, and is similarly undervalued. For example, while men produce crops for cash, often with external finance, women's production of crops for household consumption does not attract the same level of support.
- The gender division of labour is a key tool of women's oppression. The solution is not for women and men to swap jobs. It is for women's and men's work to be equally valued, once both sexes have equal opportunities to education, training and types of work. This has to include men's increased work in the reproductive sphere, such as undertaking tasks for the household and caring for its members.



Activities on gender division of labour

- **Quick wheel exercise** (see above). Examples of questions:
 - Would society fall apart without a gender division of labour?
 - Does men's work contribute more to economic growth than women's work?
 - Don't children need their mothers at home?
 - Aren't men's and women's skills and abilities complementary?
 - Shouldn't men be free of domestic duties to earn more for the family?
 - If women did everything men did, would society need men?
- **24-hour day.** Participants fill out a chart detailing their own activities by the hour over 24 hours. For people working at community level, this should be done with men and women from the community itself.
- **Globalisation impacts differently on women and men.** For example, the economic 'miracle' in South-East Asia was built to a large extent on the labour of women, especially in the export sector. When the export sector collapsed, so did women's employment. Yet recovery programmes typically focused on job creation for men. (Adapted from GMS manual: *Gender Mainstreaming in Trade and Industry*). Participants discuss what this tells us about the gender division of labour, and valuing men's and women's work.

4.3 Practical and strategic needs

Practical gender needs arise from the conditions women experience because of the roles ascribed to them by society. Often, these needs are related to their roles as mothers, homemakers and providers of basic needs. Projects can meet the practical gender needs of both men and women without necessarily changing their relative position in society. Examples of actions that address practical gender needs:

- reducing women's workload, e.g. location of stand-pipes and hand-pumps, providing grinding mills and developing fuel-efficient stoves;
- improving health, e.g. primary health centres, clean water supply and child spacing/family planning advice;
- improving services, e.g. primary schools, housing infrastructure and transport facilities; and
- increasing income, e.g. skills training, credit initiatives and access to markets.

Strategic gender needs are those that need to be met to overcome the subordinate position of women to men in society. They relate to women's empowerment. Such needs vary according to the economic, political, social and cultural context. Most governments now know they should enable women to address their strategic needs. Examples of actions that address strategic gender needs:

- improving education opportunities, e.g. adult literacy classes, female teachers provided as role models and gender-aware textbooks;
- improving access to productive assets, e.g. legal status on land ownership, rights to common property and bank accounts;
- enabling women to take part in decision-making, e.g. participation in elections, representation at the local, provincial and national levels, and establishing and supporting women's groups; and
- promoting equal opportunities for employment, e.g. equal pay for comparable jobs (even if there is a gender division of labour) and increasing women's access to jobs traditionally done by men.

It is sometimes said that 'women in development' projects address practical gender needs, while 'gender and development' projects address strategic gender interests. The reality is more complex, since either approach may address both types of need. But the distinction between practical and strategic gender needs is a useful means of evaluating how far a particular policy or intervention may further gender mainstreaming goals.



Key points

- The distinction between practical and strategic gender needs can be a powerful tool. It alerts planners and policymakers to the fact that addressing only the immediate needs of women will not help them in the long term to address the structural inequalities from which many of those needs arise.
- It is often difficult to distinguish between the two, but the key issue is to look for links between them. Responding to what may seem to be a practical need may lead to changes that alter the balance of power between the sexes. Reducing women's workload as a response to a practical need can open other doors that enable women to address strategic needs.
- The policy context is important. A micro-credit programme in response to a need for income can remain at the practical level if gender relations are not analysed. If the project aims to increase women's status and autonomy as well as address their material needs, however, it can bring long-term changes.
- Analysis of the gender division of labour shows that women typically take on three types of roles in terms of their paid and unpaid labour. These are:
 - reproductive (care and maintenance of the household and all its members)
 - productive (production of goods and services for consumption and trade)
 - community-based (organisation and management of collective events, services and politics)

Activity on gender needs

- **Quick wheel exercise.** Examples of questions:
 - What are men's strategic needs and interests?
 - What if the needs and interests of women and men's conflict with each other?
 - Will women be able to advance without men's support?
 - Is a shelter for women abused by men a practical or strategic need?
 - Can you meet a strategic need without addressing a practical need also?
 - Is basic numeracy a practical or strategic need for women?
 - Do practical interventions affect women's power and status?

(For further activities on practical and strategic needs, see Trainer's Guide Module 3: Development Planning.)

4.4 Development approaches

From Women in Development to Gender and Development

The Commonwealth Plan of Action summarises the shift of focus from Women in Development (WID) to Gender and Development (GAD) as follows:

“WID policies aim to integrate women into existing structures and address women’s specific needs and concerns. The focus is on how women must change to fit into an essentially ‘man-made’ world. GAD, on the other hand, seeks to integrate gender awareness and competence into mainstream development to account for the different life courses and different impacts of development policies on women and men. It emphasises that development activities may affect women and men differently and calls for appropriate ‘gender planning’ to address them. It also calls attention to ‘outcomes’, and the need to take the necessary steps to ensure that the resulting conditions and outcomes are equitable, rather than being preoccupied with giving only identical treatment. In summary, the GAD approach focuses not only on the differences between men and women but on the inequalities that emanate from these differences: women and their allotted roles have been historically undervalued and continue to be so up to the present time.” (Commonwealth Secretariat, 1995a: 14)

WID to GAD

The WID approach began with an acceptance of existing social structures and focused on how women could be better integrated into existing development initiatives. Targeting women’s productive work not their reproductive work, this approach was characterised by income-generating projects for women that did not address the causes of gender inequality. It tended to view women as passive recipients of development assistance, rather than as active agents in transforming their own realities. Women’s concerns were viewed in isolation, and so marginalised.

Barriers to equality are socially constructed and maintained by a complex array of influences that are difficult but not impossible to change. That gender relations can change is shown by the fact that they vary across cultures and time.

A GAD framework is more likely to recognise that:

- women and men have different needs;
- women cannot be treated as a homogeneous group because factors like race/ethnicity, class, age, disability and sexual orientation create differences among women and between women and men;
- women tend to be disadvantaged relative to men in terms of their welfare and their access to and control over the means of production. But in inequitable class societies, and in the present international economic order, some women are more privileged than some men;
- inequality is systemic and structural;
- commitment is needed to a process whereby development interventions work towards women’s and men’s increased empowerment and equality (adapted from Longwe, 1991: 150);
- gender differences can also result in men being disadvantaged. (For example, the phenomenon of male under-achievement in Caribbean education systems is beyond the scope of the WID approach, but can be addressed through a gender-aware approach to development.) Tracking gender equality in sector-specific data makes it possible to compare the positions of women and men in relation to, for example, health, education, family structures, the labour market and earnings/income. Appropriate policy interventions can then be made to promote gender equality and equity. (Based on GMS Handbook, pp 17-18. See also Trainer’s Guide Module 3: Development Planning Activity 2.)



Gender mainstreaming

"The gender mainstreaming approach focuses on the fact that women and men have different life courses and that development policies affect them differently. It addresses these differences by mainstreaming gender into development planning at all levels and in all sectors, focusing less on providing equal treatment for men and women (since equal treatment does not necessarily result in equal outcomes), and more on taking whatever steps are necessary to ensure equal outcomes. It recognises that the empowerment of women can only be achieved by taking into account the relationships between women and men." (*GMS Handbook*, p 18)

"This term may be conceptualised into different ways: on the one hand it is an integrationist strategy which implies that gender issues are addressed within the existing development policy, strategies and priorities. Hence, throughout a project cycle, gender concerns are integrated where applicable. On the other hand, mainstreaming also means agenda-setting, which implies the transformation of existing development agendas using a gendered perspective. These two concepts are not exclusive and actually work best in combination." (GMS manual: *Gender Mainstreaming in Legal and Constitutional Affairs*: Appendix 3)

"Mainstreaming a gender perspective is the process of assessing the implications for women and men of any planned action, including legislation, policies or programmes, in any area and 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 the policies and programmes in all political, economic and societal spheres so that women and men benefit equally, and inequality is not perpetuated.

"The ultimate goal is to achieve gender equality." (E.1997.L 30.Para.4. Adopted by ECOSOC 17 July 1997)

Note that:

- Gender mainstreaming must be transformative, not just a strategy to integrate gender into existing policies and programmes without thereby changing them;
- It must be empowering to women; and
- Its goal must be to achieve gender equality.

The Gender Mainstreaming System (GMS) provides a comprehensive system for mainstreaming gender. It addresses the policy context, structural and cultural issues within government or other institutions, and the requirements for effective gender analysis and planning. The GMS mainstreaming strategy includes working with a wide variety of stakeholders in government and civil society.

4.5 Frameworks for gender analysis and planning

- There are a number of frameworks for gender analysis and planning that are commonly used in gender training and throughout the planning cycle of projects and programmes.
- Frameworks can help dig out and categorise information required for analysis. They may help in understanding complex situations and planning or evaluating the impact of interventions on women and men. Some rely on top-down information-gathering, others on participatory techniques. Some are applicable to a wide variety of contexts. Others are more appropriate to community-level planning, or to emergency response and refugee contexts.
- Four of the most widely-used frameworks are included in the table opposite, with their relative strengths and weaknesses. The Moser framework is the one used in the GMS. It includes the identification of women's triple role, practical and strategic gender needs analysis, and the policy approach matrix categorising the government or agency approach to development. The ideas of access and control, from the Harvard Framework, are widely used. The Longwe Empowerment framework and the IDS Social Relations Framework are briefly outlined in the table as a taster for what they offer.
- Not covered by the table are frameworks specific to emergency response, such as the Capacities and Vulnerabilities Framework (CVA) developed at Harvard and the People-Oriented Planning Framework (POP) built on the Harvard Framework, and the Gender Analysis Matrix (GAM) developed by UNIFEM as a participatory tool for community-level awareness-raising, planning and impact assessment. However, useful concepts from the CVA and Harvard/POP are outlined below.



Frameworks

FRAMEWORK AND ELEMENTS	STRENGTHS	WEAKNESSES
<p>Moser framework of gender planning</p> <ul style="list-style-type: none"> - triple role - strategic and practical needs - policy approaches 	<p>Regarded as simple to use Can be used at all levels Elements used for awareness-raising as well as planning Challenges inequalities Captures all of women's work Uses concept of strategic needs to change gender relations Examines policy assumptions</p>	<p>'Needs' language can make planning top-down, beneficiaries seem passive Triple role, practical and strategic distinctions not always clear Leads to separate pictures of women and men Change over time not included</p>
<p>Harvard gender analysis framework</p> <ul style="list-style-type: none"> - activities profile - access and control of resources and benefits - influencing factors - checklist 	<p>Practical and hands-on Good for data collection Best at project level as requires micro-level analysis and detailed information Clear picture of division of labour makes women's work visible Uncontroversial as based on facts, thus good entry point for planners</p>	<p>Does not address gender relations or power Leads to separate pictures of women and men Can lead to top-down, superficial information if not used in participatory way Change over time not included</p>
<p>Longwe empowerment framework</p> <ul style="list-style-type: none"> - five rising levels of equality (welfare, access, conscientisation, participation, control) - levels of recognition of women's issues (negative, neutral, positive) 	<p>Use at all stages of project cycle to look at transformatory potential of interventions Focuses on empowerment and equality as goals Enables analysis of levels of women's empowerment Useful as a toolkit of concepts Sees practical to strategic needs as a progression rather than discrete categories</p>	<p>Deals in broad generalities only Hierarchy of levels of empowerment does not include types of resources and their relative importance Gender relations seen only in terms of equality, leaves out other complex aspects Empowerment focus can lead to women-only focus Change over time not included</p>
<p>IDS social relations framework</p> <ul style="list-style-type: none"> - social relations - institutions (state, market, community, family/kinship) - structural cause analysis 	<p>Use at all levels, for policy and planning Focus on institutions means organisations must examine themselves Holistic poverty analysis through taking into account cross-cutting inequalities e.g. race, class Highlights gender relations Shows change over time</p>	<p>Complicated to use Gender can get lost in other categories of analysis Unsuitable for participatory community-level use Focus on institutions downplays individual agency May be hard to agree on clear definition of institution</p>

(Adapted from March et al, 1999)

Capacities and vulnerabilities

The CVA framework was developed to assess the extent to which emergency response promotes or undermines long-term development aims. It makes a useful distinction between the short-term needs of women and men in crisis and their long-term vulnerabilities. These are the result of pre-existing conditions, and make them more susceptible to crisis. It balances this with the concept of capacities – people’s abilities, pre-existing and current, to withstand crisis and recover from it. Capacities and vulnerabilities are divided into three categories for analysis:

- **Physical and material:** resources women and men need for their livelihoods, such as land, climate, skills, health and technologies.
- **Social and organisational:** the ‘social fabric’ – women and men’s social networks, political organisations, decision-making patterns within institutions, distribution systems of goods and benefits and access to social resources such as education.
- **Motivational and attitudinal:** the state of well-being or despair of women and men, based on cultural and psychological factors such as religious belief or group identity, history of crisis, response to the crisis itself and expectations of emergency relief.

Although this framework was designed for emergency response, the concepts of capacities and vulnerabilities and the three categories can be applied to any situation. They are useful tools for gender mainstreaming. The framework itself is a matrix. Its flexibility is one of its great strengths. It can be used at community, district or national level, or with a specific group of people. It can map situations over time and record changes, and can be used to analyse not only gender but other factors of social difference.

Activities profile: access and control

The Harvard gender framework analysis and the POP framework both use an activity profile to answer the question: Who does what? This explores the productive and reproductive activities of women and men and overlaps with the Moser gender roles analysis. It is the access and control concept from both frameworks that is most widely used. This can examine which resources women and men use for their activities, and the relationship they have to them – whether user rights or full control over how to use and dispose of them. The products of those resources, development inputs or project benefits are looked at in the same way. This enables agencies to assess whether women and men benefit equally from interventions as well as from systems of resource allocation within the gender division of labour. The analysis of influencing factors (Harvard) and the determinants analysis (POP) examine the external events and internal social dynamics that affect women and men, their activities, and their patterns of resource use. They also provide ways of assessing project impacts as a result of interventions.



4.6 Concept table

CONCEPT	WHAT DOES IT MEAN?
Sex/gender	Basic dichotomy in analysis of male/female differences.
Sex	The biological differences between women and men. People are born female or male, with different bodies and different chemistry.
Gender	The socially constructed differences between women and men. Babies are born girls and boys who learn how they are expected to think and behave as women and men. This differs from one culture and society to another, changes over time, and defines who has power and influence over what.
Gender relations	The social relationships between women and men that reflect and reproduce gender difference as constructed in a particular context, society and time. They express differentiated power, rights, responsibilities and values, as well as mutuality; gender relations intersect with other social relations based on age, class, ethnicity, race, sexuality and disability.
Types of gender policy	<p><i>Gender-blind</i> – ignores the different socially determined roles, responsibilities and capabilities of men and women. It is based on information derived from men’s activities and/or assumes those affected by the policy have the same (male) needs and interests.</p> <p><i>Gender-neutral</i> – is not specifically aimed at either men or women and is assumed to affect both sexes equally. However, it may actually be gender-blind (see above).</p> <p><i>Gender-specific</i> – recognises gender difference and targets either men or women, within existing roles and responsibilities.</p> <p><i>Gender-redistributive</i> – seeks to change the distribution of power and resources in the interests of gender equality.</p>
Gender balance	Equal or fair distribution of women and men within an institution or group, giving equality of representation.
Gender equality and equity	<p>These concepts are not the same, although often used interchangeably.</p> <p><i>Equality</i> is rights-based. Women and men have equal rights, enshrined in international standards and treaties and should have the same entitlements and opportunities.</p> <p><i>Equity</i> means justice so that resources are fairly distributed, taking into account the different needs of women and men, girl and boys. It is best used linked clearly to rights, as an outcome of gender equality.</p>
Gender division of labour	The work and responsibilities assigned to women and men on the basis of their gender identity. In most societies, men’s work is more highly valued than women’s work. Much of women’s work is unpaid and unrecognised.
Women’s triple role	Moser identified three categories of women’s work: <i>reproductive</i> (care and maintenance of the household and all its members); <i>productive</i> (production of goods and services for consumption and trade); and <i>community-based</i> (organisation and management of collective events, services and politics). Men share the last two but rarely the first, which in most societies is not considered as work.

Practical and strategic needs	<p><i>Practical gender needs</i> arise from the different material conditions of women and men; they reflect women's subordinate position in society but do not include challenging it.</p> <p><i>Strategic gender needs</i> of women and men arise from their position, status and power. Women's strategic gender needs may include ownership rights to land and challenging the gender balance of power and control to achieve gender equality.</p> <p>The concept of practical and strategic gender needs as planning tools was developed by Moser as a way of expressing the different experience and expectations of women and men. In practice, the distinction between practical and strategic is not always clear-cut. A practical gender need for women may be a water source nearer to home, but this could also free time for women to access skills training – a strategic interest.</p>
Condition and position	Used to differentiate between material conditions, in which women and men live, and position or status they hold in society.
Development approaches WID/GAD	Women in Development (WID), and Gender and Development (GAD) refer to two essentially different approaches to development. WID is based on the assumption that women are 'left out' of development, and need special projects to 'integrate' them. Gender relations and power inequalities are not addressed, and women's participation is often passive. GAD is based on gender analysis and sees gender equality as a fundamental development goal, with women's empowerment and agency as key features of development strategy.
Gender mainstreaming	A strategy first articulated by ECOSOC in 1997 with GAD goals and a commitment to gender equality in all aspects of policy and programme design and implementation. Its aim is to transform the 'mainstream' at all levels to end gender discrimination. When transformation of gender relations is not part of the agenda, mainstreaming can be a WID strategy in disguise, in which gender issues are 'mainstreamed' to the point of invisibility.
Frameworks	<p>There are a number of frameworks for gender analysis and planning that are commonly used in gender training and throughout the planning cycle of projects and programmes. Four of the most widely used are the Moser framework, Harvard framework, Longwe Empowerment framework and the IDS Social Relations framework.</p> <p>The Capacities and Vulnerabilities framework (CVA) and the People-Oriented Planning framework (POP) also contain tools useful for gender mainstreaming, as does the Gender Analysis Matrix (GAM) developed by UNIFEM.</p>
Sex disaggregation	Identifying and highlighting the differences for women and men in all aspects of life. It is particularly important for understanding gender differences within units of analysis such as 'household', 'family', 'community', 'market' and 'nation'.
Gender analysis	Based on sex-disaggregated data and the accounts of women and men, it goes further to examine why the observed differences exist. It explores the history, mechanisms, dynamics and effects of gender relations. It examines the structural causes of gender inequalities from the household to the nation state, making links between these levels and uncovering resulting sex discrimination in access to rights, power and resources.
Access and control	Access to resources means being able to use them; <i>control</i> over resources means deciding who may use them, and how. Part of the Harvard gender framework analysis.