

▶ Closing the **Gap**

*Putting EU and UK Gender Policy into Practice
– South Africa, Nicaragua and Bangladesh*

Zohra Khan



Mission Statement

One World Action is working for a world free from poverty and oppression in which strong democracies safeguard the rights of all people.

To this end, we provide money, expertise and practical help to organisations committed to strengthening the democratic process and improving people's lives in poor and developing countries. In all cases they initiate and work on the projects that we support, ensuring that local needs are genuinely understood and met.

As well as supporting our partners' work on the ground, One World Action represents their interests in Europe, putting forward their views in debates on policy towards poorer countries, and helping them to forge closer links with decision makers in Britain and the European Union.

These 'partners for change' include other voluntary organisations, community and co-operative movements, women's organisations and trade unions. Though diverse in kind, they have a common commitment to strengthening local institutions and giving people a say in the decisions that shape their lives.

Central to our work is the belief that defeating poverty goes hand in hand with promoting human rights and good democratic government. Only if we pursue these goals in a coherent way can we build a just and equal world.

November 2003

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ONE WORLD
ACTION
FOR A JUST AND EQUAL WORLD

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▶ Foreword

I became Director of One World Action as the **Closing the Gap** project was starting, and I have been able to learn from it, and understand why gender analysis is critical to sustainable development. For me, a key learning experience was seeing two maps of the same Bangladeshi village, one prepared by the women and one by the men. They did not look like the same village at all – women and men saw a different reality, had different priorities.

Closing the Gap offers a somewhat different perspective to other research on gender policy implementation because it is grounded in the experiences of people working directly with gender issues in the focus countries. The evidence is consistent. Gender remains a low priority in EU and UK development co-operation despite policy commitments to the contrary. We are acutely aware that civil society organisations need to move beyond the realm of critique. We therefore make concrete recommendations in this report highlighting examples of good practice and demonstrating that gender policy implementation is possible.

For a just and equal world, the voices and views of the poorest women and men, girls and boys, have to be heard. This report shows why it is absolutely critical to strengthening democracy and ensuring sustainable development. Being clear what gender means, setting goals, doing systematic gender analysis, training staff, providing real leadership, and assigning the money for implementation – all these will help close the gap between existing gender policy and practice. I hope this report will make an important contribution to closing the gap between policy and practice and between women and men.

Graham Bennett

Director

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▶ *Acronyms and abbreviations*

AMAV	Association of Men against Violence (Nicaragua)
BPFA	Beijing Platform for Action
CAP	Country Assistance Plan
CEDAW	Convention on the Elimination of all forms of Discrimination Against Women
CGE	Commission on Gender Equality (South Africa)
CSP	Country Strategy Paper
DFID	United Kingdom Department for International Development
DFIDB	DFID Bangladesh
DG	Directorate General
EC	European Community (Aid Programme)
ERCERP	Strengthened Economic Growth and Poverty Reduction Strategy (Nicaragua)
EU	European Union
GDP	Gross domestic product
GEAR	Growth, Employment and Redistribution (South Africa)
HPSP	Health and Population Sector Programme (Bangladesh)
HQ	Headquarters
IFIs	International financial institutions
INIM	Nicaraguan Institute for Women
MWCA	Ministry for Women and Children's Affairs (Bangladesh)
OSW	Office on the Status of Women (South Africa)
PAHO	Pan-American Health Organization
SDA	Social Development Adviser (DFID)
SIDA	Swedish International Development Agency
SWAp	Sector-wide approach
ToRs	Terms of reference
TSP	Target Strategy Paper

Summary of findings and recommendations

KEY FINDINGS

Gender analysis

Gender analysis is fundamental to gender mainstreaming and poor or non-existent gender analysis results in a policy-practice gap. A political commitment to gender equality is empty if it is not underpinned by a gender analysis. The **Closing the Gap** research found that in both DFID and the European Commission gender equality was invoked as a policy priority and was regularly included in strategy papers as a cross-cutting theme, but there was little analysis of what this means in practice or how the principle should be implemented.

A sound gender analysis must be based on good sex-disaggregated information, and the collection/generation of such data is a key practice in the implementation of a gender policy. All data collected by organisations for the purposes of management, planning and monitoring progress should be routinely sex-disaggregated. Best practices should also be identified for both planning purposes and to enrich the analysis of the impact of gender mainstreaming initiatives.

Clarity on gender concepts, goals and gender mainstreaming strategy

Lack of understanding of gender concepts affects the definition of goals and strategies and can lead to policy evaporation and gender-blind planning. The research found gender knowledge gaps due to lack of clarity about gender as a concept, gender equality as a goal and mainstreaming as a strategy, and widespread ignorance of existing gender policies. Gender was often seen as simply meaning *women*, rather than referring to an analysis of the *power relations* between women and men. There was confusion between gender *equality* as a *goal* and gender *mainstreaming* as a *strategy*. This distinction needs to be clearly understood and maintained throughout the project cycle. Clarity and visibility of gender equality goals at the operational level of programmes and interventions is also necessary to prevent policy evaporation.

Mainstreaming as a strategy to achieve gender equality

The strategic documents produced by both DFID and the European Commission state that they aim to use a twin-track approach to gender equality, supporting specific projects addressing gender or women's issues alongside the mainstreaming of gender in all their projects and sectors. However, this strategy has not been well translated into practice: mainstreaming has been given priority over women-specific actions and the complementarity of the strategies has not been fully grasped. Where there is uncertainty about how to implement gender mainstreaming or resistance to implementing it, gender issues may not be addressed at all.

Linking gender equality goals to other development goals

Convergence and coherence between gender equality goals and other development goals such as poverty reduction or other cross-cutting priorities are important to the promotion of gender issues. Most development policy and strategy documents, including PRSPs, now draw explicit links between poverty reduction and gender equality goals; but there is a risk that gender equality may become an instrumental or secondary objective, desirable not as an end in itself but only in so far as it contributes to poverty reduction.

In practice, addressing multiple cross-cutting issues in planning often becomes a matter of juggling competing priorities, and, in the absence of guidelines on how to prioritise or otherwise accommodate these, gender can be diluted or pushed aside.

Although gender is recognised as a cross-cutting issue and the responsibility of everybody, in practice it tends either to be seen as the province of social development specialists only, or to be left informally to individual committed staff members with gender knowledge. Thus institutionalisation of gender equality remains weak in both the European Commission and DFID.

Aligning financial and human resources with gender policy commitments

A key challenge to implementing gender policies is the lack of adequate **financial resources**. All three studies showed a mismatch between policy commitments and resource allocation. Donor commitments to gender equality expressed in policy or planning documents must be backed up with adequate – and ring-fenced – budgetary resources both to fund gender – or women – specific activities and to support mainstreaming activities (gender training, capacity building, networking, research, tools development, monitoring and evaluation). The need for specific gender budgets, however, does not diminish the crucial importance of analysing the gendered impact of mainstream budget allocations, including national budget allocations.

Matching policy commitments with **human resources** is also key for effective gender policy implementation. The country studies found that gender is routinely under resourced in both financial and personnel terms.

Institutional barriers to gender mainstreaming

In both DFID and the European Commission, weak institutionalisation of gender equality in systems and structures was seen as the chief barrier to effective gender mainstreaming. In DFID, the combination of diffused responsibility for gender mainstreaming (everyone's responsibility) in theory and its relegation to SDAs and other committed individuals in practice leaves much room for policy evaporation. It is too soon yet to comment on the effect of the creation of the post of Senior Gender and Rights Adviser in DFID, but it signals a significant change in approach to gender mainstreaming.

In the European Commission there are constraints of underresourcing (especially understaffing) and undefined responsibility for gender, although there may be improved opportunities to ensure mainstreaming in the new ensemble of institutional mechanisms resulting from the reform of the European development cooperation and external relations. A sub-group on gender equality in external relations meets regularly, a manual on mainstreaming and guidelines for use of monitoring indicators are being developed, and an extensive training programme to improve gender competence is planned for 2004.

The research found that people responsible for gender lacked the resources and decision-making power to influence the policies of their organisation. Meaningful promotion of gender equality requires both designated staff with appropriate skill, expertise and seniority, as well as commitment and support from senior management.

Finally, implementing gender equality policies requires both structural and attitudinal change. It is important to involve staff and external stakeholders in developing gender policies so as to secure ownership of them and ensure that the policy corresponds to the organisation's culture, structures and procedures. Involving staff and other stakeholders in developing the policy increases the chances of getting the policy implemented.

Gender knowledge and capacity

Lack of knowledge of gender policies and of techniques for gender mainstreaming was a major constraint in all three country studies. Neither DFID advisers nor European Commission project officers were fully conversant with their own institution's gender policies. There was little evidence that any of the many gender mainstreaming tools, resources and materials available were applied in programme or intervention implementation. Delegations and country programme staff lacked the time, skills and commitment to use them effectively.

However, none of the existing models of gender training seem completely effective. Gender training needs to go beyond simple awareness-raising and address gender analysis and the tools and techniques of mainstreaming as a practical strategy, but one-off gender training exercises do not enable learners to acquire a useful level of knowledge for practical purposes, especially where staff turnover is rapid. On the other hand, DFID's attempt to mainstream gender into all training courses has often meant that gender is simply neglected. Gender training needs to be ongoing, participatory, and followed up to be sustainable.

Monitoring and evaluating gender policy implementation

The country studies traced different degrees of success in monitoring and evaluation of gender mainstreaming or progress towards gender equality goals. While the incorporation of gender considerations into evaluations in Nicaragua and South Africa by both donors is low, DFID Bangladesh shows an established process of gender review feeding into subsequent policy strategy development.

Deconcentration

Deconcentration of responsibility from Brussels to EU country delegations and DFID decentralisation offers both opportunities and threats for gender policy implementation. Although it creates opportunities for innovative, context-specific gender work, it runs the risk of marginalising gender. Because delegations have greater autonomy in decision making, the risk that gender work may be sidelined is a real one, if not viewed as a priority for delegations.

Of the three focus countries, Bangladesh offers the clearest illustration of this trend. The process seems to be working better in the case of DFID than in the European Commission. EU delegation staff reported a big gap between Brussels and Dhaka in terms of information, consultation, and support, while DFIDB staff reported new and creative ways of working such as linking across sectors e.g. rural livelihoods and gender.

Involving men

In recent years, the body of knowledge examining the role of men in achieving gender equality has been growing. Both men and women in donor institutions need to work together to ensure that gender analysis underlies their work at every stage.

The Nicaragua study suggests that European donors currently prefer to support gender in projects that work equally with women and men rather than women-specific work. However, this trend contradicts the underlying principle of the twin-track approach to gender mainstreaming – the idea that strategies aimed at reducing the inequalities between men and women are as valid when working with women only as they are when working with both men and women

Dialogue and networking

In addition to policy dialogue at government level, networking by donors with organisations engaged in gender work is important and needs to be strengthened. The **Closing the Gap** consultations in South Africa, Nicaragua and Bangladesh provided forums for networking and exchange and confirmed the need to strengthen existing linkages and build coalitions among civil society organisations, government and donor agencies engaged in gender mainstreaming at national and regional levels.

Of the two donors, DFID appears to engage in dialogue with civil society in partner countries more than the European Commission does, possibly because of the importance of stakeholder analysis in DFID's planning procedures. The country studies highlighted examples from Bangladesh and, to a lesser extent, Nicaragua. In general, formal and informal structures for dialogue between EU delegations and civil society are underdeveloped.

RECOMMENDATIONS

Accountability and transparency

- Both the European Commission and DFID should strengthen accountability systems, processes and procedures at HQ and delegation or country office levels. Development of an accountability matrix as a tool is recommended.
- Both the European Commission and DFID should clearly define and express their expectations of delivery in performance appraisals, work plans and reports, using clear guidelines on accountability to governance structures, annual reports, and reporting on progress.
- In the context of increased deconcentration, special attention should be given to strengthening mechanisms of accountability in EU delegations and DFID aid management offices.
- The European Commission and DFID should consider developing country-level gender action plans.

Conceptual clarity

- Gender equality goals should be made explicit and visible at policy, strategy and operational levels. In particular, each programme and intervention should have an explicit gender equality goal.
- Clarity should be developed on key gender concepts, gender equality as a goal, and on strategies to meet this goal, including gender mainstreaming.
- The twin-track approach should be reaffirmed in the light of a clear understanding of gender equality goals and strategies.

Linking cross-cutting policy priorities

- The relationship between gender equality and other cross-cutting themes should be clarified in policy development processes. Linkages between gender equality and other goals, such as poverty reduction, should be made with the proviso that gender equality is not lost among competing priorities.
- Linking cross-cutting themes should be seen not simply as a policy requirement but as a necessity to achieving overall programme/project goals.
- The European Commission and DFID should emphasise the coexistence and interrelationship of cross-cutting policy priorities at institutional and country programme levels while at the same time promoting operational clarity regarding gender within specific interventions.
- The European Commission and DFID should explore fully the potential of sector-wide approaches for promoting gender equality.

Policy coherence

- The EU and DFID should strive to maintain coherence between their policies on gender equality in development cooperation and the overarching development policy framework within which gender and development policies are located.
- Policy objectives related to poverty reduction, trade and the promotion of economic growth in partner countries should be consistent with the gender equality goals expressed in both donors' institutional gender equality policies and their policies on gender equality in development.

Analysis and strategy

- Rigorous, detailed gender analysis should inform all development planning processes and all aspects of programmes/projects should have gender equality goals. A gender analysis should be applied to policy frameworks and strategies, programme/project design and implementation, and institutional development.
- Both the European Commission and DFID should put more systematic effort into the collection and use of sex-disaggregated statistics as a quantitative basis for their gender analysis, while also giving attention to qualitative gender analysis.
- The European Commission and DFID should build and maintain close relationships with gender research and training institutions, gender advocates, and academics and practitioners in areas of gender, women's human rights and development.
- The European Commission and DFID should continue to utilise fully and consistently the twin-track strategy for meeting gender equality goals. Mainstreaming and other strategies to include gender equality goals in all development cooperation should not preclude specific support to women's projects and to strengthening the role of women as a constituency in civil society.
- In particular, the European Commission and DFID should continue to support activities that focus specifically on empowering women in the context of extreme gender inequality in Bangladesh and Nicaragua.

Matching policy commitments with organisational structure

- Policy priorities should be reflected in organisational structure, recognising that achieving gender equality is a political as well as a technical process.
- The European Commission and DFID should continue to devote attention to internal institutional development and capacity building geared towards their own development as more gender-responsive organisations.
- Senior management in both the European Commission and DFID should show active commitment to the goal of gender equality in their internal and public statements, and should provide visible and unequivocal support to the development of institutional gender capacity.

Staffing and capacity

- The European Commission and DFID should support their gender mainstreaming strategies by appointing designated staff with appropriate gender skills and expertise at decision-making levels.
- The European Commission and DFID should reduce reliance on a small number of individuals with gender competence and commitment by including appropriate gender knowledge and expertise in the requirements for new staff recruited and in the Terms of Reference (TOR) of consultants. If such expertise proves difficult to find, it should be developed through training, on-the-job learning and the provision of easily accessible information systems on gender issues.
- Staff with lead responsibility for gender should have adequate support systems, including financial resources, senior management support, continuous training and gender sensitive work practices. In turn, such staff should offer support, guidance and advice to ensure that institutional knowledge and capacity is developed and sustained.
- Senior staff should take responsibility for cross-cutting and mainstreaming issues.

Matching policy commitments with resources

- Both the European Commission and DFID should devote adequate and sustained financial, human and time resources to the activities essential to closing the gap between policy and practice, both at headquarters and in their respective field structures.
- Policy commitments to promoting gender equality must be backed up with adequate budgetary provision to fund general and specific initiatives. Specific budgetary allocations for gender mainstreaming are essential to fund innovative catalytic work and gender mainstreaming initiatives.
- To inform planning exercises, both the European Commission and DFID should consider undertaking a gender budget analysis of their development cooperation by:
 - ▶ Applying a gender budget analysis to development assistance channelled through direct budgetary support;
 - ▶ Developing systems for monitoring budgetary support processes including gender indicators;
 - ▶ Working toward strengthening the gender perspective in PRSPs and CSPs;
 - ▶ Establishing separate budget lines or targets for gender activities within budget support processes;
 - ▶ Supporting government and civil society initiatives on gender budget analysis.

Training

- Both the European Commission and DFID should conduct gender training at both HQ and delegation or country office levels, aimed at deepening understanding of gender relations in the country context. This should apply at both levels, so as to help narrow the gap between HQ and field.
- Both the European Commission and DFID should consider making gender training compulsory and fully integrated into all pre-posting training.
- Particularly in delegations/country offices, both the European Commission and DFID could explore less formal training methods, such as inviting external speakers from NGOs or universities to address staff, brown-bag lunches and networking opportunities.
- Gender training should be:

- ▶ specific and relevant to the work of individuals and appropriate to their role in the organisation;
- ▶ institutionally supported from the top;
- ▶ adequately resourced;
- ▶ followed up regularly to ensure that knowledge and expertise in this area is maintained; continuously evaluated.

Monitoring and evaluation

Both the European Commission and DFID should carry out monitoring and evaluation:

- At the **institutional** level, including:
 - ▶ systems and procedures for monitoring staff performance in implementing gender policies should be designed and applied;
 - ▶ gender equality goals should be incorporated in the job descriptions and work plans of staff and they should be monitored and appraised accordingly;
 - ▶ in both the European Commission and DFID more systematic and comprehensive supervision of gender policy implementation in both field and central offices is needed.
- At the **project management** level, including:
 - ▶ gender equality goals should be included in both the project logical framework and the ToRs for implementation staff, including external consultants;
 - ▶ gender equality should be identified as a policy priority in projects and as an objective in project conceptualisation and implementation;
 - ▶ project proposals should include a gender impact assessment form. The European Commission should reinstate the regular use of this form;
 - ▶ staff with experience, capacity and decision-making authority should monitor gender policy implementation during the entire project cycle and define targets and indicators to measure success.
- Both DFID and European Commission should consider conducting independent annual gender reviews of their respective development cooperation activities, building on the good examples provided by some country offices.
- Both the European Commission and DFID should intensify their efforts in documenting, highlighting and disseminating good practice examples in accessible forms, so as to encourage ongoing efforts to integrate gender equality issues into operations and institutional lesson learning.

Civil society participation

- The European Commission and DFID should identify key partners and interlocutors in civil society and government and set up formal and informal information exchange opportunities with stakeholders, so as to encourage buy-in, create a more enabling environment for promoting gender equality, and enhance understanding of gender policies.
- Civil society organisations should also seize the opportunities offered by donors to make inputs into development cooperation policies and advocate for the expansion of such opportunities.

Dialogue, partnerships and networking

- Both the European Commission and DFID should proactively increase their dialogue, partnerships and networking around gender mainstreaming with non-state actors particularly including diverse women's organisations.
- Greater donor coordination is required to promote gender equality policies and mainstreaming in practice and to help make gender mainstreaming more consistent in practice across a range of donors. The European Commission and DFID should draw on their own positive examples of donor networking.

▶ 1 Introduction



Closing the Gap is a three-year programme of research, advocacy and awareness raising targeted at United Kingdom and European Union policy makers to press for implementation of their policy commitments on gender equality and development. The British government and the EU contribute large amounts of funding towards development programmes in Africa, Asia and South and Central America. They also have strong policies on gender equality (see Section 3), yet in the countries to which they channel aid, women continue to be disproportionately represented among the socially, economically and politically excluded. Gender policy implementation continues to be a low priority. Through research and advocacy in three countries – **South Africa, Nicaragua and Bangladesh** – One World Action aims to improve understanding of the policy-practice gaps and identify ways of narrowing them.

This report addresses gender equality and women's human rights in the UK and the European Community development cooperation programmes in South Africa, Nicaragua and Bangladesh. Six case studies are used to compare on-the-ground practice with stated policy commitments. Both the EU and the UK policy and strategy documents on gender referred to in this report endorse the eradication of gender inequality as a key step toward poverty reduction. However, this report demonstrates that despite strong policy commitments to gender mainstreaming, practice fails to meet policy goals in these country contexts. Our research draws strongly on views from the field and therefore highlights the practical challenges that lead to policy evaporation.

1.1 One World Action's position on gender equality

One World Action works for a world free from poverty and oppression in which strong democracies safeguard the rights of all people. To this end, we provide money, expertise and practical help to organisations committed to strengthening the democratic process and improving people's lives in poor and developing countries. Central to our work is the belief that defeating poverty goes hand in hand with promoting human rights and good democratic governance. As well as supporting our partners' work in their own countries, One World Action represents their interests in Europe, putting forward their views in debates on policy towards poorer countries and helping them to forge closer links with decision makers in Britain and the European Union.

In our work towards building a just and equal world, One World Action emphasises the importance of political participation, service provision, and economic empowerment and the need for gender equity and equality in these areas. Women and men should have equal rights, an equal voice in civil, political, economic, social and cultural life, and should not face discrimination on the grounds of their gender.

For One World Action poverty is about lack of power and denial of one's full human rights – civil, political, social, economic and cultural. Poverty affects women and men differently, and it affects different women in different ways. Women face discrimination because of their gender and because of other sources of discrimination. Women experiencing multiple forms of discrimination face particular barriers to enjoying their human rights.

Gender inequality prevents the realisation of human rights and disempowers people – both women and men. Although gender inequality affects both women and men, women tend to bear the brunt of gender discrimination. Poor women are largely excluded from political power. Poor women are also disadvantaged economically: often women are paid less than men for the same work, their job opportunities are limited, and legal and cultural barriers deny them equal access. Services are often inadequate and inaccessible and do not meet women's practical and strategic gender interests. Women live with the threat, or actual experience, of violence from men simply because of their gender.

Closing the Gap is funded by the Community Fund and is built on strong partnerships with policy makers, civil society organisations and activists working in the fields of gender equality, human rights and democracy. Their enduring collaboration is vital in supporting local efforts to eradicate gender inequality and reduce poverty in South Africa, Bangladesh and Nicaragua.

1.2 Structure of the report

Section 1 of this report introduces the **Closing the Gap** project and outlines the conceptual framework and methodology of the study. Section 2 provides a contextual overview of the key gender issues in South Africa, Nicaragua and Bangladesh. Section 3 analyses UK and EU policies and strategies related to gender equality and looks at their application in the focus countries. Section 4 looks at policy in practice. Section 5 compares policy and practice by presenting key findings and analysis, while section 6 presents conclusions and policy recommendations. A summary of the conclusions and recommendations can be found above.

1.3 Methodology

Three countries where One World Action works in partnership with local/national development NGOs were chosen as the focus countries for the **Closing the Gap** project: South Africa, Nicaragua and Bangladesh. These three countries were selected because they reflect regional diversity and represent different levels in both funding from donor governments and national government commitment to gender equality. At the same time they have in common several features with important implications for gender policy implementation. One World Action has strong gender partners in each country, so there is high potential for gender advocacy as a result of the **Closing the Gap** project.

One World Action commissioned three country reports in 2002. These were produced by consultant researchers Shamim Meer (South Africa); Myra Pasos Marciacq and Almachiara D'Angelo (Nicaragua); Mandy Macdonald and Shireen Huq (Bangladesh). This research was conducted over a period of ten months and included the following activities:

- desk reviews of the gender policies and gender mainstreaming strategies of both the EU and UK development cooperation with South Africa, Nicaragua and Bangladesh;
- interviews in the three countries with DFID country programme staff, EU delegation staff, national government representatives, civil society organisations, academics and activists working on gender equality issues;
- review of one DFID-funded and one EC-funded project/programme in each country to examine practice.

Between January and April 2003, One World Action conducted one consultation in each of the three countries. The objective of the consultations was threefold:

- present preliminary research findings and invite feedback;
- provide an opportunity for delegations to respond to the research;
- raise awareness of the challenges and barriers to gender mainstreaming.

The consultations provided a forum for networking and exchange. Participants from a wide range of sectors including government, donors and NGOs attended and drew on their experiences in developing strategies for improving the implementation of gender policies. Five out of six delegations/country offices attended the consultation.¹ A key issue arising from the consultations was the need to strengthen existing linkages and build coalitions among civil society organisations, governments and donor agencies engaged in gender mainstreaming at national and regional levels.

A desk review of recent internal and external assessments of EU and UK policies and practice on gender and development was also carried out in order to set the country experiences in context (see: Braithwaite et al., 2003; OWA, 2003; Miers et al, 2003; Macdonald, 2003a, 2003b; GAD Network, 2003; Painter & Ulmer 2002).

This report draws on the analysis, findings and recommendations of the three country reports, compiled from primary sources of information, and thematically analyses the key trends identified in these reports. One World Action's partner organisations in South Africa, Nicaragua and Bangladesh are members of the **Closing the Gap** advisory group, which has guided the research throughout. They will participate in advocacy activities over the next six months including a visit to London and Brussels later this year to meet with policy makers.

¹ DFID Bangladesh was not represented at the consultation held in Dhaka on 10 April 2003.

1.4 Constraints and limitations

Time and resource constraints have meant that the report offers a snapshot view of practice in the focus countries at a particular moment. It is time-specific and cannot provide information or comment on any changes that have taken place since the country research was completed and the results of the consultations incorporated. Nonetheless, the findings emerging from the available information give a significant insight into the practical difficulties and challenges of implementing gender policies in a range of developing-country situations.

Limited human and time resources have also meant that it was not possible to carry out a close textual analysis comparing policy and strategy documents at country level with those determining overall policy (e.g. comparing DFID Country Strategy papers with Target Strategy Papers). Some general conclusions have been drawn using the secondary sources mentioned in section 1.3 above.

Since the country reports were written, several new strategy documents and plans have emerged from both DFID and the European Commission. We have tried to take account of these, but readers should be aware that the main part of the research, and in particular the field research, was done before these new documents were issued.

One World Action welcomes additional or corrected information that will enrich this analysis and contribute to the ongoing dialogue with DFID and the European Commission on gender equality and mainstreaming in development cooperation.

2 National contexts



2.1 South Africa

Although classified in aggregate terms as a middle-income country, South Africa has one of the world's highest levels of income inequality. Fifty per cent of the population is poor, with greater poverty in the former homelands (the areas relegated to black South Africans under apartheid) and among female-headed households (EC, 1999). The post-apartheid government has been unable to redress these imbalances in the eight years since it came to power, and there have not been significant material improvements for the vast majority of black South Africans. Economic growth is slow, enterprise development low, and unemployment as high as 40% in the former homelands. The government's macro-economic programme, Growth, Employment and Redistribution (GEAR), has not generated growth or new employment opportunities. It hinges on market liberalisation and aims to limit the role of government in service provision. Delivery of social and infrastructural services (education, health, water, electricity and housing), especially to rural areas and townships, has consequently lagged. At the same time, HIV/AIDS has reached catastrophic proportions, and crime is rife throughout the country (Meer, 2003).

All these conditions have gender-differential impacts, and women are usually even more adversely affected than men. For example, female-headed households have a 50% higher poverty rate than male-headed households and suffer particularly from the lack of access to services in rural areas (World Bank, 1995). Violence against women is an acute problem and HIV/AIDS further exacerbates women's poverty and workload.

The South African government has a strong commitment to gender equality. The Constitution guarantees equality between women and men and the government is committed to the Beijing Platform for Action (BPFA) and has ratified the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW). There is a comprehensive national machinery to promote and protect gender equality rights, including:

- the Parliamentary Committee on the Improvement of the Quality of Life and the Status of Women, established in 1996 to oversee the implementation of CEDAW and the BPFA;
- the Commission on Gender Equality (CGE), established in 1997 to monitor and review legislation and the gender policies of publicly funded bodies so as to ensure that gender equality is promoted and protected;
- the Office on the Status of Women (OSW) in the President's Office, established in 1998 to initiate policy reform and to coordinate and provide guidance to gender focal points in national and provincial government departments.
- gender focal points in most government departments.

Almost all line departments have attempted to include women's concerns in their White Papers; some have produced gender policies, and many have held some form of gender training for department staff. However, the national gender machinery is severely under resourced, making gender equality bodies ineffective and unable to fulfil their constitutional mandates. Under the post-apartheid government, 'paper' rights have not been translated into 'real' rights or visible improvement in the lives of poor South African women.

South Africa benefits from a vibrant civil society. Non-governmental organisations play a key role in service provision, policy reform, lobbying and advocacy. Many organisations, both women-specific and mixed, work on gender issues and have a strong commitment to addressing gender inequality (see Meer, 2003 for examples). There is a great deal of space for CSOs to engage with government on gender policies, and this is reflected in the government's stated support for gender issues.

2.2 Nicaragua

The United Nations Development Programme's *Human Development Report for 2000* ranks Nicaragua as the third poorest nation in Latin America. It has the lowest per capita gross domestic product (GDP) in Central America (UNDP, 2000) and an external debt three times the size of the GDP. Limited export diversification and high dependence on imported technologies are major constraints on economic growth. Despite its large agriculture and livestock sector, Nicaragua cannot feed its population and its economy depends heavily on external cooperation assistance. Aid constituted 22% of GDP in 1998. Nicaragua's industrial sector is underdeveloped and has contracted in recent years. However the informal sector, in which women are strongly represented, has been steadily growing. Energy, transportation and communications infrastructure are all inadequate.

Female-headed households (33% of total in 2000) are among the poorest in Nicaragua, and their poverty is linked to reduced access to land, credit, services, technical assistance and training (Pasos Marciacq & D'Angelo, 2003). Religious conservatism also impedes the advancement of gender equality and women's rights in Nicaragua. Conservative groups have proposed repealing legislation guaranteeing therapeutic abortion.

Nicaragua does not have a national gender policy, and ministries have failed to incorporate a gender perspective or analysis in their work. There have been isolated attempts at formulating gender policies in different sectors such as food security or production, but there is no overall policy. Although the government has committed itself to CEDAW and the BPFA, the institutional mechanisms to operationalise and monitor these commitments are feeble.

The Nicaraguan Institute for Women (Instituto Nicaragüense de la Mujer, INIM) formulates gender policy proposals at national and local government level in collaboration with civil society organisations. Originally the INIM was an independent body but was integrated into the Ministry of the Family in 1998. The INIM receives only 0.03% of the national budget and lacks the human and financial resources to fulfil its mandate. INIM participates in the government's social cabinet, but not the economic cabinet, where development cooperation decisions are made (Pasos Marciacq & D'Angelo, 2003).

Although the capacity of the Nicaraguan women's movement and of civil society in general to influence national policy has diminished in recent years, the women's movement retains a presence at the local level. About 200 NGOs focusing on women's rights are currently active around the country, working with community-based groups on a range of issues. The Women's Network on Violence is one of the most notable national women's networks. In 2000, the Association of Men against Violence (AMAV) was established to raise men's awareness of gender and masculinity issues, work for changes in men's attitudes, values, and behaviour and contribute to the reduction of domestic violence. Despite this there is currently little dialogue between Nicaraguan CSOs and government.

2.3 Bangladesh

Despite slow but steady economic growth and improved macro-economic stability in the 1990s, Bangladesh still suffers great structural poverty. Current per capita income averages about US\$1 per day (EC, 2001b: 11). In 2001, half the country's 65 million population were declared to be living in poverty. High levels of inequality, including gender inequality, are also prevalent: income distribution is becoming increasingly unequal and the extreme poor are benefiting least from such economic growth (DFID 2002a: 10).

In terms of social indicators, Bangladesh has seen an improvement in fertility and infant mortality rates and in school enrolment in recent years. There are still problems in many areas such as reproductive and other health services, literacy and nutrition.

Since the end of military rule in 1991, Bangladesh has been governed by a multiparty, democratic system. However, both DFID and the European Commission have identified poor governance as a key challenge to Bangladesh's development. Broad participatory democracy, decentralisation and bureaucratic accountability are very limited, especially at local level.

Women are disproportionately represented among the poor in Bangladesh. Almost all women-headed households (95%) are poor, 40% extremely poor (DFID, 2002a: 10). Opportunities for women in formal employment are limited and the pay equity gap is large, especially in low-paid and informal work. Maternal mortality is high; early marriage and pregnancy reduce women's education, labour force participation, mobility and access to services. Many forms of violence against women, often linked to religious conservatism, are very common. Women's participation in public life remains low.

The Government of Bangladesh includes gender equality and women's empowerment in its policy priorities for 2001-2010 (EC, 2001b: 19). It has endorsed the BPFA and ratified the main International Labour Organisation (ILO) Conventions on women's labour rights. It has signed CEDAW, but with reservations on property and adoption rights. The National Action Plan (NAP) is the main tool for implementing the BPFA. It aims to:

- make women's development an integral part of the national development programme;
- promote women as equal partners in development with equal roles in policy and decision making in the family, community and nation;
- remove legal, economic, political or cultural barriers preventing the exercise of equal rights by policy reform and affirmative action;
- raise public awareness about women's differential needs, interests and priorities.

The Ministry for Women and Children's Affairs (MWCA) is responsible for implementing the BPFA. As with women's equality machineries in South Africa and Nicaragua, it is under resourced and receives marginal donor support. Some donors have been engaging with the Ministry to strengthen institutional capacity to support the implementation of the NAP and CEDAW; but overall progress has been slow (Macdonald, 2003c).

Civil society organisations and community groups have mushroomed over the last decade: there are now 1,800 registered NGOs and countless unregistered local groups (EC, 2001b:14)

Some similarities with significant implications for policy implementation can be detected among South Africa, Nicaragua and Bangladesh:

All three countries have under resourced national structures, programmes and interventions to promote gender equality leading to ineffective implementation of policies and legislation.

Commitments to gender equality expressed in policy and planning documents are not backed up with adequate budgetary provision. Budget analysis is a key indicator of government and donor commitment to gender equality, and can track the extent to which budgets become more gender-sensitive in response to new policy (see Norton & Elson, 2002: 35ff for a discussion of gender budgeting).

All three countries have strong and vibrant civil society organisations working on gender equality issues in collaboration with government and donors. This interface between government and civil society is important and necessary as CSOs can hold government to account for policy evaporation, while government can enlist the support of CSOs. South Africa has many strong examples of good donor/ CSO and government partnerships. This is less so in Bangladesh and Nicaragua.

Women experience high levels of poverty in all three countries. They are disproportionately affected by poverty, violence and lack of access to resources and services. Poor women are largely excluded from political decision making. Legal and cultural barriers deny them equal access to credit, goods and services. Specific measures to address women's position in these three countries are necessary and urgent if poverty is to be reduced significantly.

▶ 3 Review of EU and UK Gender Policies and Strategies



This chapter reviews the gender policies and strategies of the European Union and the UK government which guide development cooperation activities in South Africa, Nicaragua and Bangladesh. Reference is made where relevant to recent reviews and evaluations by both the European Commission and DFID.

3.1 Overview and international context

Both the UK and the EU acknowledge that gender inequality is a determinant factor in poverty and express commitment in their policies to reducing gender inequality as part of their overall strategies for poverty reduction. While both institutions also show awareness of gender equality as a human right, the treatment of gender equality and mainstreaming in their main policy documents fluctuates between efficiency-based and rights-based approaches.

The European Union has had a specific gender and development policy since 1995 (European Development Council, 1995) and a gender mainstreaming Programme of Action since 2001 (European Commission, 2001a), but there is a noticeable mismatch between the policy statements and the EC's practical implementation of gender mainstreaming in its external relations and in development cooperation on the ground (Painter & Ulmer, 2002; Braithwaite et al., 2003). The UK government, through the UK Department for International Development, has a progressive policy on gender in development cooperation (see DFID, 2000), which is implemented in varying degrees depending on the country, the sector, and the commitment and capacity of individual staff members (see Macdonald, 2003 b).

These gender and development policies exist, in both cases, in a broader policy context that includes commitments to eliminating inequalities and promoting gender equality and non-discrimination in all EU and UK activities. The EU has a strategy for mainstreaming gender in all policies and programmes, including European Community development cooperation (EC, 2000a); in the UK, DFID's policies are inscribed in a national policy and legislative framework that stresses non-discrimination and equal opportunities. Both the European Commission and DFID have institutional targets for gender balance in staffing especially at senior levels, though in both cases these are far from being met across the board.

The Millennium Development Goals (MDGs), which now provide an overarching framework for both European and British development cooperation, add another layer of international accountability to the policy framework in both institutions. The MDGs build on commitments made in the UN conference agreements of the 1990s, of which one of the most important is the Beijing Platform for Action. The BPFA states (United Nations, 1995):

The empowerment of women and gender equality are prerequisites for achieving political, social, economic, cultural and environmental security... Governments and other actors should promote an active and visible policy of mainstreaming a gender perspective in all policies and programmes so that, before decisions are taken, an analysis is made of the effects on women and men respectively.

The existence of a specific MDG on reducing gender inequality is commendable. However, this and other relevant MDGs are couched in such a way as to make it easy for governments and donors to interpret them narrowly and restrict measures of gender policy implementation to education and reproductive health indicators (Macdonald, 2003c). More challenging areas of intervention such as women's political participation or economic empowerment have been less often explored, though they are given equal weight in the BPFA. However, DFID's recent experiences with gender mainstreaming (Miers et al., 2003) include innovative work on areas of governance (access to justice, engendering political processes, combating violence) and exploring gender-environment linkages. DFID's most recent thinking on gender mainstreaming is leading towards a focus on strengthening DFID's internal capacity to push for effective gender mainstreaming at the policy level with partner governments, and on working multilaterally (e.g. with UNIFEM, FAO) at a strategic level (ibid).

European Community and UK development cooperation programmes are increasingly shifting their focus upstream towards non-project-based, macroeconomic forms of assistance involving direct support to national governments, particularly in the context of Poverty Reduction Strategy Papers (PRSPs) (see, e.g., Painter & Ulmer, 2002:18; Macdonald, 2003b). National finance and planning ministries and international financial institutions (IFIs) have played the main role in determining PRSP content, but they show a very uneven understanding of the gendered nature of poverty; at the same time, national bodies representing women's interests, both governmental and non-governmental, often lack influence and the capacity for gendered poverty analysis (Whitehead, 2003). This poses a challenge to DFID and the European Commission in their approaches to macro-economic cooperation, which they have met in varying degrees. In both DFID and the European Commission, the stated commitment to gender equality and mainstreaming is not reflected in institutional structures and mechanisms that adequately guarantee implementation of the policies. In both institutions, too, the gender training provided does not guarantee high enough gender competence throughout the staff to ensure that the gender policies are put into practice routinely, as gender mainstreaming requires (see Painter & Ulmer, 2002:31-2; Macdonald, 2003b).

3.2 The European Union's gender policies and strategies

The European Development Council's 1995 resolution, 'Integrating gender issues in European development cooperation', commits the EU to mainstreaming gender analysis in the conception, design, implementation, monitoring and evaluation of all programmes and interventions. It recognises that special attention needs to be given to 'specific measures' to counter major gender disparities, and states that 'women and men should both participate in and benefit from the development process on an equal basis'. The need to mainstream gender and at the same time support women-specific initiatives to ensure women benefit from development processes is very clearly articulated in the draft new Regulation (Commission of the European Communities, 2003) to be adopted in late 2003.

The 2001 *Programme of Action for the mainstreaming of gender equality in Community development cooperation* (EC, 2001a) provides a gender analysis of the six thematic areas identified as priorities for development cooperation in the EU's 2000 Development Policy² (see European Council/European Commission, 2001) and outlines steps for improving mainstreaming in each area. Significant progress is being made: for example, a sub-group on gender equality in external relations meets regularly, a manual on mainstreaming and guidelines for use of monitoring indicators are being developed, and an extensive training programme to improve gender competence is planned for 2004.

The current Regulation on GAD (no. 2836/98) provides the legal framework for the management of the small gender budget line (B7-622, formerly B7-6110)³. Beneficiaries may include both government and non-governmental bodies. Although the Regulation refers to an indicative budget of €25 million for implementing the gender programme, these indications are not reflected in the yearly budget allocations. The budget allocated to this line for 2002 was €2.2 million and for 2003, €2.5 million.

These documents provide the most comprehensive statement of the EU's gender mainstreaming strategy. They express commitment to reducing gender inequality as part of an overall strategy to eliminate poverty. They take a twin-track approach to implementation, combining gender mainstreaming in general programmes and projects with women-specific interventions. However, experience in the focus countries and elsewhere suggests that these policy commitments often evaporate rapidly in implementation, and possibly do not always even reach field delegations to inform implementation. Politically, the EU is expressly committed to mainstreaming gender and other cross-cutting issues, but it translates this commitment inconsistently into specific programmes, activities, tools and the allocation of resources, especially human resources. The organisational structures to support gender mainstreaming have improved since 2000 (OWA, 2003: section 4.3, p6), but on the whole gender work tends to be driven by committed individuals rather than institutionally guaranteed; there is a lack of gender knowledge among staff in general, and tools and guidance materials are produced but underused.

Beyond development cooperation in the narrow sense, the European Union has not matched its stated gender policy with a practical commitment to implementing it throughout other external relations activities, such as trade or foreign and security affairs. This is an area that should particularly be examined in the light of the growing donor emphasis on direct macroeconomic support to governments as a development strategy.

² These are trade and development; regional integration and cooperation; macroeconomic policies and promotion of equitable access to social services; transport; food security and sustainable development; and institutional capacity building.

³ See <http://www.eurongos.org/resources/tips/ec6.html>

3.2.1 Reviews and evaluations

In 2002 the European Commission commissioned a major thematic evaluation of the integration of gender issues in its development cooperation (Braithwaite et al., 2003). It reviewed the three major EU policy statements on gender and development: the Council Resolution of 20 December 1995, the Council Regulation on the integration of gender issues into development cooperation (22 December 1998), and the 2001 Programme of Action for gender mainstreaming. It also assessed implementation of the EU gender policy in four countries (Bolivia, Jordan, Mali and the Philippines). Broadly, it concluded that commitment to gender equality and mainstreaming in policy documents, though frequently expressed, was often formalistic and without substance; that implementation was therefore of uneven quality; that there was a lack of knowledge about gender mainstreaming throughout the institution, compounded by poor dissemination of existing materials; and, finally, that the upheavals caused by the long-drawn-out restructuring of the EC's development cooperation machinery between 1995 and 2001 had contributed largely to discontinuity in attention to gender issues in cooperation and to a loss of institutional memory on gender.

In March 2003, the gender desk of DG Development commissioned One World Action to compile the available information on recent research done in the area of bridging the policy-practice gap (OWA, 2003). This review drew on the findings of the Closing the Gap country reports as well as on information from a range of international donors. This review pinpointed as issues requiring attention conceptual clarity on gender, linking gender equality goals with other development goals, organisational change to meet gender equality goals, the need for specialist gender expertise and a general level of gender competence among staff, adequate monitoring, reporting and evaluation based on gender indicators, adequate resources to implement gender policy commitments, and the involvement of men in promoting gender equality.

The conclusions and recommendations of **Closing the Gap**, based on the experience from the focus countries, broadly support the conclusions and recommendations of these evaluations.

3.3 The United Kingdom's gender policies and strategies

The United Kingdom government, through the UK Department for International Development, has a progressive policy on gender in development cooperation, which is implemented in varying degrees. The 1997 White Paper, *Eliminating world poverty: A challenge for the 21st century* (DFID, 1997) states that the empowerment of women is a prerequisite for achieving effective and people-centred development. DFID's key gender policy document is the 2000 Target Strategy Paper, *Poverty eradication and women's empowerment* (DFID, 2000). This policy focuses on women's empowerment rather than gender equality. It has specific objectives to achieve gender equality, including support to national women's machinery and civil society organisations as part of its strategy to promote gender equality and women's advancement. Both documents have an explicit rights-based approach.

Like those of the EU, DFID policies highlight gender inequality as a key factor in poverty and express commitment to reducing gender inequality as part of their overall strategy to eliminate poverty. However, this analysis is not consistently or coherently applied. The Target Strategy Paper on women's empowerment does not always inform the sectoral TSPs or other strategic planning documents. In particular, Country Strategy Papers and Country Assistance Plans are not always consistent with the TSP on women's empowerment.

While gender issues are identified in contextual analysis, they disappear in project implementation. Gender policy tends to evaporate during the project cycle, although there are a number of project management instruments and tools to provide guidance in designing and implementing gender-sensitive activities. Attention to gender in Project Memoranda, for example, is provided almost exclusively by the social appraisal section and annex (Macdonald, 2003c).

3.3.1 Reviews and evaluations

A general gender evaluation of DFID has been in preparation for some time, but some important preparatory work has been done in reviewing existing gender evaluations in DFID country programmes and analysing gender in the latest CSPs/CAPs. DFID has commissioned a number of gender-related reviews and studies of its programmes have been carried out in recent years (Ghana, Bangladesh and China are outstanding examples: see Akpalu et al. (2000); Derbyshire (1999); Kanji & Du Jie, 2003; also Macdonald, 20203b). Together these form a useful body of evidence about the successes and challenges of gender mainstreaming in DFID.

The following sections provide a gender analysis of the key EU and DFID policy documents referring to the three focus countries.

3.4 South Africa

The following is a brief analysis of the treatment of gender in the policy and strategy documents that govern EC and DFID cooperation with South Africa. For more detail, see the 'Closing the Gap: South Africa' country report (Meer, 2003).

3.4.1 European Development Cooperation

The Framework of Cooperation with South Africa (European Commission, 2000b) does not include a gender analysis. Gender is mentioned as a cross-cutting theme alongside good governance, human and institutional capacity building, and environmental protection.

The situation analysis in the Country Strategy for South Africa 2000-2002 (European Commission, 1999) notes the prevalence of gender inequality, especially in access to the labour market, finance and land. Focusing on the basic needs of previously disadvantaged groups, this paper takes into account good governance, human and institutional capacity building, gender issues and environmental protection as cross-cutting themes.⁴

An evaluation of the 1996-1999 Country Strategy noted that there was little specialist knowledge on the priority objectives of poverty reduction, environmental protection and gender equality. Among the weaknesses noted was difficulty in incorporating priority objectives such as environment and gender in project design. Other weaknesses noted, such as insufficient consultation with beneficiaries, weak knowledge creation systems, insufficient analytical work and unsystematic learning, all potentially contribute to the evaporation of gender policy at an early stage.⁵

3.4.2 DFID

DFID's 1998 Country Strategy Paper (CSP) for South Africa focuses on the transformation of public services delivery to meet poverty reduction goals, recognising the need to empower previously disadvantaged groups through sustainable livelihood approaches. However, it does not place the empowerment of women or gender equality at its core. The situation analysis describes gender inequality as a 'social problem' and notes that women do not enjoy equal rights in decision making, land allocation, access to finance, inheritance, or marriage and divorce. It also notes high levels of violence against women. In keeping with DFID's overall strategy of market liberalisation as a means to economic growth, the strategy provides market solutions to issues of growth, redistribution and poverty. It promotes privatisation and the removal of market distortions without considering the implications of such policies on poor women and men.⁶

The 2001 Annual Plan and Performance Review measures progress against the CSP and sets out future plans. It pinpoints lack of clarity, specificity and coherence in the strategy in several respects – in indicators, objectives, links between analysis and programme objectives, and approach – all of which make it difficult to measure the impact of development cooperation and also the degree to which gender concerns are addressed by the cooperation. However, since it does not have a strong focus on gender, the opportunity to integrate gender equality goals into future plans is missed.

Overall, there is a lack of coherence between these policy and strategy documents and the gender policies of DFID and EU. The increasing thrust of both DFID's and the EC's development

4 A new Country Strategy for the period 2003–2005 was issued in mid-2003.

5 See http://europa.eu.int/comm/europeaid/evaluation/evinfo/acp/951477_ev.html. This abstract, however, does not mention gender at all.

6 DFID's new CSP for South Africa is much stronger on gender than its predecessor.

cooperation is to promote market liberalisation as the most effective means of achieving growth and reducing poverty. However, market liberalisation and the accompanying privatisation of state services have adverse effects on poor women (Meer, 2003). This puts the overarching development policy framework at odds with gender policies aimed at empowering poor women.

3.5 Nicaragua

The following is a brief analysis of the treatment of gender in the policy and strategy documents that govern EC and DFID cooperation with Nicaragua. For more detail, see the 'Closing the Gap: Nicaragua' country report (Pasos Marciacq and D'Angelo, 2003).

3.5.1 European Development Cooperation

The development cooperation relationship with Nicaragua rests on a series of agreements and strategies. The Framework Cooperation Agreement between the EU and the Central American countries (1993, entered into force 1999) defined the strategic axes of economic cooperation with the region as strengthening democratic institutions, the rule of law and public security; poverty alleviation; and promoting productive capacity. Its focus is primarily on economic cooperation, though it includes a human rights and democratisation clause, like most EU 'third-generation' agreements with third countries/regions. Gender equality is more specifically mentioned in the Stockholm Declaration of March 1999, in which Central American countries and donors agreed guidelines for reconstruction of the region after Hurricane Mitch. In 2001, the EU and the Nicaraguan government signed a Memorandum of Understanding outlining guidelines for the cooperation programme during 2000-2006 (European Commission, 2000: 5). Nicaragua's Country Strategy Paper 2002-2006 follows the main principles of the Memorandum and fits within the framework of the August 2001 Poverty Reduction Strategy Paper of Nicaragua.

The Memorandum of Understanding mentions gender equality only as a basic principle, referring to work methodologies that focus on promoting social equality, including equality between men and women. When discussing sectoral policies, it gives a clear policy guideline establishing the basis for sector-oriented dialogue with the government, prioritising the rural, education and governance sectors. It emphasises the most vulnerable groups of the population, yet gender is a marginal theme in the sector-oriented dialogue.

There is more attention to gender at the programme level. The current Country Strategy Paper, covering the period 2002-2006, refers to the situation of Nicaraguan women and clearly recognises the connection between gender inequality and poverty (European Commission, 2002: 31). More specifically, the Food Security programme scheduled to begin in 2003 proposes incorporating a cross-cutting gender approach into all the programme's objectives and results as well as introducing a women-specific component. This is a good example of the twin-track approach.

A global evaluation of EC-Nicaragua cooperation was carried out in 2000. Although it was extensive and detailed, this evaluation did not include any gender indicators. Further, a budget analysis of projects implemented since 1997 reveals that although gender equality and women's human rights are priorities for EC development cooperation, only three out of 70 EC-funded projects specifically deal with gender (Pasos Marciacq & D'Angelo: 2003).

3.5.2 DFID

The UK government only recently began providing direct cooperation assistance in Nicaragua, the first projects for the Central American region being established after Hurricane Mitch in 1998. It opened a small DFID office in Nicaragua even more recently, in 2001, and its current bilateral aid programme is extremely small (Pasos Marciacq & D'Angelo, 2003: 39). DFID's activities in Nicaragua are defined in a regional strategy paper for Central America (DFID, 1999), in which gender inequality is identified as a problem and 'increasing the participation of women and indigenous people in the development process' is included among critical issues needing to be addressed in the region. Beyond these general references, however, the strategy paper does not deal with gender equality. DFID's activities consist mainly of collaboration in project design and implementation with multilateral institutions and agencies such as the Inter-American Development Bank, the UNDP and the Pan-American Health Organization (PAHO), through offering technical support and expertise to other donors. This approach has been

chosen as the most effective way of deploying the limited funds DFID has available for work in Central America (Pasos Marciacq & D'Angelo, 2003: 38). However, DFID, together with other donors, is supporting the National Plan on Violence, a pilot project being implemented by the Ministry of the Family which places particular emphasis on domestic violence (Pasos Marciacq & D'Angelo, 2003: 39).

In its multilateral relationships, DFID has often taken a leading role on gender equality issues, for instance in its ongoing collaboration with UNIFEM and the OECD-DAC working group on gender (Miers et al., 2003; Macdonald, 2003b). When it leads PRSP donor groups, it has taken the initiative in using the PRSP as a policy window to advocate with national governments for greater attention to gender equality. However, the Nicaragua country study for **Closing the Gap** found that, although DFID has a clearly defined gender policy of which its Nicaragua office staff are aware, it has not been able to exert a direct influence on the incorporation of a gender-sensitive approach into the implementation of the programmes in which DFID participates (Pasos Marciacq & D'Angelo, 2003: 40). Previous attempts to support development agencies that supposedly employed a gender approach have not been particularly successful. A new initiative cofinancing the National Plan on Violence, a pilot project being implemented by the Ministry of the Family (which incorporates the women's institute INIM) has potential for good gender mainstreaming, but incorporating such a perspective into the Ministry will be a challenge requiring the building of both technical capacity and strategic alliances (ibid.).

Although the nature and size of their cooperation programmes in Nicaragua are different, both the European Commission and DFID conceptualise gender and development issues in their cooperation principally in terms of poverty reduction. In this framework, international agreements on women's and human rights fade into the background. In practice, for both the European Commission and DFID, the cross-cutting strategy has largely remained at the policy level, since gender tools are not used in studies, planning or monitoring and concrete gender equality goals have not been defined. Large projects with governmental partners tend to lack a social, and therefore inevitably a gender, dimension (Pasos Marciacq & D'Angelo, 2003: 45).

3.6 Bangladesh

The following is a brief analysis of the treatment of gender in the policy and strategy documents that govern EC and DFID cooperation with Bangladesh. For more detail, see the 'Closing the Gap: Bangladesh' country report (Macdonald, 2003c).

3.6.1 European Development Cooperation

The cooperation agreement for 1999-2001 states that the main aim of EC cooperation is poverty alleviation. The EC programme aims to complement rather than duplicate the efforts of other donors (e.g. in the area of governance) and has concentrated on improving human development indicators. However, of the Agreement's seven objectives, only one – to 'encourage the empowerment of the poor and the participation of the disadvantaged in development processes, in particular through redressing gender disparities' – explicitly refers to gender equality.

The Country Strategy Paper for 2002-2006 (European Commission, 2001b) treats environment, gender and good governance as cross-cutting issues that should be mainstreamed into all the EC's work. It also acknowledges and supports the Bangladesh government's inclusion in its national plan for 2001-2010 of the achievement of gender equality and the empowerment of women as an objective. However, the CSP does not itself mainstream gender issues. It shows little gender disaggregation of data and only in areas corresponding to a narrow reading of the MDGs, such as literacy and fertility rates. Gender-relevant information is given at some points in the country situation analysis, for example in the section on human rights and good governance, but not with reference to women's participation in political processes. The focus on women does not strongly highlight inequality as a challenge.

The National Indicative Programme 2003-2005 outlines the activities to be supported by the EC during the three-year period, based on the priorities set by the CSP 2002-2006. Like the CSP, the NIP does not adopt a gender mainstreaming approach, but places women in the context of disadvantaged and vulnerable sectors of society needing special attention, mainly in terms of health care. The NIP mentions 'improving the role of women and other disadvantaged groups through increasing commercial activities and access to markets', but gives no hint as to how this will be achieved. Gender does feature prominently, however, in the section on promoting democracy and human rights, which foregrounds the negative impact of violence against women and children on socio-economic development and aims to strengthen the justice, education and social service systems (Macdonald, 2003).

3.6.2 DFID

A scan of the various policy and strategy documents guiding DFID's cooperation with Bangladesh reveals clear progress as regards their incorporation of a gender perspective. The 1998 CSP for Bangladesh was not particularly strong on gender mainstreaming, although it recognised that severe gender inequalities persist in Bangladesh. Its approach was women-specific rather than focused on gender equality. By contrast, the 2002 Country Strategy Review (DFIDB, 2002a), written in preparation for the 2003 Country Assistance Plan (CAP), contains much more frequent reference to gender than any previous general strategy documents, including the MDG-focused review of the same year, *Bangladesh: Supporting the drivers of pro-poor change* (Duncan et al., 2002). The situation analysis in the CSP review refers several times to women's rights, and identifies gender inequality as 'the most significant barrier to poverty elimination in Bangladesh'. Strategically, the review recognises the work of non-governmental organisations towards improving the position of women, but also stresses the role of government in providing public services and calls for high-level political dialogue on a range of development challenges. With this review as a key input, it is expected that the new CAP will favour a strong gender focus and make gender equality a priority.⁸

A very important factor in this visible change in DFID's treatment of gender issues in Bangladesh is the fact that, in 2000, DFID Bangladesh designed a Gender Equality Strategy, which set a rights-based approach to promoting gender equality and made women's rights the overarching goal of the strategy. The strategy explicitly recognised the need to challenge gendered social relations by working with men as well as women. Most significantly, it shifted attention to women and gender equality beyond the situation analysis and into the project cycle and the logical framework, recommending that women's strategic and practical gender interests should be analysed and taken into account in project design, implementation and evaluation. It suggested concrete tools, resources and practices to meet this objective, and called for monitoring via an annual progress review. The DFIDB gender strategy informed the Country Strategy Review as well as providing a good example to DFID in Bangladesh and other DFID country programmes.

For a detailed discussion of the series of policy and strategy documents on Bangladesh, see Macdonald, 2003c.

The responses of DFID and the European Commission to the gender and development challenges in Bangladesh contain similarities and also some differences. In the case of DFID, the array of policy documents and review processes is stronger than most practice, although there are some examples of good practice on gender. With European development cooperation, the policy is rather weak and is often seen as irrelevant in-country, but examples of good practice occur independently of the policy.

Summary points

The foregoing analysis of gender issues in EU and UK policies and strategies points to some progress over time in both institutions. Evidence of this positive shift is visible in the increasingly frequent linking of poverty with inequality and particularly gender inequality, and in the growing adoption of rights-based approaches (although efficiency-based approaches still carry a good deal of weight with policy makers particularly in economic fields). To a large extent this progress can be seen as a result of bottom-up advocacy for women's rights and gender equality. At the international level this was the unprecedented mobilisation of women and women's organisations around the Fourth World Conference on Women in 1995 and its energetic follow-up in 2000. At the national level, many concrete examples show how a strong women's movement has influenced government policy. But this influence is not always translated into donor commitment. In South Africa, for instance, the women's movement had a strong influence on the government elected in 1994, but despite the government's stated commitment to gender equality, gender evaporated from the DFID South Africa programme (Derbyshire, 1999).

However, failure of policy coherence could be one clue to policy evaporation. It is clear that neither European Commission nor DFID country strategy papers are on the whole coherent with their respective gender and development policies, apart from recognition of the link between gender inequality and poverty. Moreover, while promoting gender equality in the context of PRSPs is tactically a useful way of putting gender issues on the agenda of dialogue with governments, it also skirts the issue of gender equality as a human right, since all PRSPs to date are strongly economically driven and, in so far as they

⁸ This document had not yet been released to the public at the time of writing; however, in a reply to a parliamentary question on 6 October 2003, International Development Minister Gareth Thomas stated that 'a new [Bangladesh] Country Assistance Plan is about to be published which gives priority to advancing the position of women and girls'; see <http://www.parliament.the-stationeryoffice.co.uk/pa/cm200203/cmhansrd/cm031006/text/31006w08.htm>

consider gender at all, take an efficiency approach. This approach, in effect, makes gender equality itself an instrumental objective, not a development goal – mainly or only desirable not in itself but because it contributes to poverty reduction (see below for further discussion on concepts, goals and strategies).

The country studies provide evidence that, while the policy statements of both the EU and the UK have advanced in their analysis of gender inequality and poverty, practice still shows insufficient attention to gender equality or women's empowerment. This is most evident in the lack of capacity, particularly at field level, to operationalise the existing policies and strategies meaningfully, even where there is willingness to do so.

4 Policy in practice



4.1 EC and UK aid to South Africa, Nicaragua and Bangladesh

South Africa, Nicaragua and Bangladesh each receive different levels of aid from the UK and the EC reflecting, among other factors, differences in the strength of historical relations, differences in levels of poverty and in the importance accorded to them by Britain and Europe respectively.

Historically, the UK has invested considerably more in South Africa and Bangladesh than it has in Nicaragua. In 1998/1999, Bangladesh and South Africa were both among the top ten recipients of UK aid, receiving £70 million and £34 million of UK bilateral aid respectively, whereas Nicaragua received just under £2 million. For FY 2001/2, the total DFID programme for Bangladesh amounted to £62.38 million, for South Africa £25.49 million, and for Nicaragua £613,000 (DFID, 2002b: tables 7.1-7.3).

EC cooperation reflects slightly different priorities. Bangladesh still receives the largest amounts of assistance of the three countries (€555.77 million under the 1999 cooperation agreement, an indicative €560 million to support the 2002-2006 strategy adopted on 25 March 2002; an indicative €411.5 million earmarked under the NIP 2003-2005).⁹ However Nicaragua receives a higher proportion of assistance from the EC than it does from DFID: the total five-year commitment set out in the Country Strategy 2002-2006 is €207.4 million (European Commission, 2002: 31). EC cooperation with South Africa in the framework of Multiannual Indicative Programmes (MIP) amounts to an average annual commitment of €125 million (MIP 2000-2002).¹⁰

It is difficult to detect what proportion of these assistance budgets is used to promote gender equality or protect women's human rights. In the case of DFID, since at least the early 1990s DFID and its predecessor the ODA have used a *Policy Information Marker System* (PIMS) to score project objectives against a number of criteria, including removal of gender discrimination (Macdonald, 2003b: section 5.1). DFID's publicly available statistical information gives the percentage of bilateral commitments by region bearing the PIMS marker for gender as a principal or significant objective, but not by country (ibid. table 2, compiled from DFID, 2002b, tables 19, 20.1).¹¹

In the case of the European Commission, budget allocations are generally not monitored from a gender perspective, so the data are not available to enable an assessment of what proportion of EC development cooperation resources contributes to the promotion of gender equality. The main identifiable financial resource supporting the European Commission's gender mainstreaming strategy is the small gender budget line (B7-6220), which has never exceeded €5 million per annum (see Braithwaite et al, 2003: 23-5). Financial resources for gender mainstreaming at country level could not be quantified by Closing the Gap researchers.¹² For more information on the DFID and EC cooperation programmes in each of the three focus countries, see the **Closing the Gap** country reports.

9 EU-Bangladesh: Funding plans 2003-2005, IP/03/52, Brussels, 16 January 2003, http://europa.eu.int/comm/external_relations/bangladesh/intro/ip03_52.htm (accessed 20 10 03); Bangladesh: Commission adopts framework for cooperation (Country Strategy Paper) IP/02/467 - Brussels, 25 March 2002, http://europa.eu.int/comm/external_relations/bangladesh/sp/index.htm (accessed 20 10 03).

10 A new MIP covering the period 2003-2006 was signed by the EU and the government of South Africa in 2003. It sets indicative programmable financial resources at €386 million for 2003-2005.

11 An honourable exception is the contribution by DFID Social Development Department to the Special Rapporteur on Violence against Women in May 2002, which detailed expenditure on many of 63 projects DFID supports in this field, including working with men on issues of masculinity and violence in Nicaragua (£34,000 over 2 years from 2001), strengthening the capacity of the South African network against VAW (£1.9m over 3 years from 1999), counselling for the survivors of domestic violence in Bangladesh (£116,000 over 4 years from 2001, and support to Public Access to Justice, also in Bangladesh, (about £1m planned over three years).

12 Based on a different selection of country case studies, the EC's Thematic evaluation (Braithwaite et al., 2003: 23-4) found little evidence of significant resourcing of gender mainstreaming activities, and only one example (p27) of a sustained approach to building capacity in gender mainstreaming at country level.

4.2 Case studies from South Africa, Nicaragua and Bangladesh

In each country, one DFID-funded and one EC-funded project or programme was analysed to assess the extent to which relevant gender policies were implemented. The selection of case study projects was based on the following criteria:

- Projects/programmes should reflect UK and EU priorities (activities on which DFID and the EC devote significant resources), in order to enable analysis of how gender is mainstreamed in big programmes;
- Projects/programmes do not have to have a specific gender or social development perspective.

The aim of the analysis was to investigate how gender policies are implemented in a project or programme, using a review of documents, interviews with staff implementing and managing the programmes, and visits to the project. The case studies were selected in consultation with researchers and DFID and European Commission staff, and were chosen from a variety of sectors including privatisation of state-owned enterprises, labour, agriculture, health, and housing. The sections below present a brief description of each project.

4.2.1 South Africa

EC: Recognition of Prior Learning Project

The Recognition of Prior Learning (RPL) Project addresses the denial of formal training in the building trades for African people under apartheid. To redress this, the government has established the South African Qualifications Authority (SAQA), a body that regulates the assessment of prior (non-formal) learning and issues qualification certificates to those proficient in various skills.

The overall objective of this project is to increase employment opportunities and productivity in the building and construction sectors. The project involved funding the Building Industries Training Board to set up centres to assess skills in bricklaying and carpentry. Overall direction of the project rests with the project steering committee, made up of representatives of the Building Industries Training Board, the departments of Labour and Public Works, trade unions, and employer bodies.

Twenty-six contracts had been awarded for RPL assessment centres by the time of the **Closing the Gap** interviews. Many of these were in remote parts of the country and were targeted at the informal sector. Assessment centres staffed by four people were located close to target communities. Assessment takes 5–7 days, and successful participants receive National Qualifications Framework (NQF) certificates. If unsuccessful, they are referred for further training.

Initially no consideration was given to the involvement of women in this project. At the design stage, the project officer, a woman, raised a concern that women were not included in the project. The all-male project steering group replied that there were no women in the construction industry. Through a process of dialogue, the project officer persuaded the steering committee to agree to a quota of women. In further discussion, childcare was identified as a barrier to women's participation. As a result of her intervention at the design stage, each assessment centre is not only required to meet a specified quota of women but to provide daycare facilities for children. The provisional work plan ensures women's participation through:

- recruitment campaign aimed at women;
- supporting infrastructure and supplementary training to enhance employment opportunities;
- links with employers and job creation projects for women;
- efforts to facilitate training of women entrepreneurs as contractors;
- technical training for women.

This experience shows that an initially gender-blind project can be made more gender-sensitive or gender-equal through dialogue and increasing the representation of women in decision-making structures. Building a link with employers was also important, ensuring that women learning a traditionally male profession would be less likely to face discrimination in employment after training. Finally, the way the project developed shows the value of having a gender-aware project officer.

DFID: Restructuring State-owned Enterprises (SoEs)

The goal of this project is to support the government of South Africa in restructuring state-owned enterprises by making expertise and information on international best practice available to the stakeholders engaged in restructuring. The three sectors involved in restructuring are electricity, telecommunications and transport. DFID's stated aim is to advance restructuring in a way that benefits the poor through building the capacity of South African government departments, industry regulators, municipalities and civic groups.

The project was not designed from a gender perspective. The consultant contracted to design it was not required to have (and did not have) gender or social expertise. A social development consultant was brought in to work with the design consultant to address gender issues, but DFID did not give clear guidelines to either of the consultants on how pro-poor and gender concerns were to be addressed.

An analysis of the design stage of the project highlighted the difficulties of meeting pro-poor objectives within this kind of restructuring process. In internal DFID discussions, the lack of a gender perspective in the analysis was raised, as was the fact that privatisation policies have a track record of adversely affecting poor people. In particular, in the three sectors proposed for restructuring, privatisation has a negative impact on poor women both as workers and consumers of these services. Price increases have placed the services beyond the reach of many poor households.

Despite these arguments, the view that prevailed in discussing this project was that restructuring was necessary for business and investor confidence and that the private sector was more efficient in running enterprises. Also, since the government of South Africa was already engaged in restructuring, DFID chose to support the process. However, the government is taking a cautious approach to privatising these sectors because of pressure from trade unions and the Anti-Privatisation Forum. Additionally local communities have taken the government to court for cuts in water and electricity. The government is aware of the competing objectives of privatisation and providing services to the poor. In some cases, differences are evident in the approaches of ministers and their staff. Officials tend to be far keener to pursue restructuring, while ministers are more cautious as to the effect on poor people (Meer, 2003).

This case reveals clearly the policy coherence dilemmas of market liberalisation versus gender equality and poverty reduction goals. Although an analysis of the limits to pro-poor growth was made in the discussion, the final decision on the direction the project was to take does not bear out DFID's view that upstream processes involving dialogue with governments offer a window for raising gender equality. At the moment it appears that social and gender issues have been sacrificed to economic considerations; however, the government's caution and the possibility of exploiting differences of approach between different levels of the government could provide an entry point for raising social and gender issues in future dialogue.

4.2.2 Nicaragua

EC: Agricultural Commercialisation Programme

The Agricultural Commercialisation Programme began in 1997. The goal of the programme is to integrate small and medium-scale farmers who are organised in associations and cooperatives into marketing mechanisms in order to obtain better prices for their products. The programme provides participating organisations with machinery, equipment, physical infrastructure and tools so that, once products are harvested, they can be stored and processed to increase their value. Because prices are low during the harvest period, the programme allows farmers to sell their products when the market favours them. Business training is provided to improve management and administrative skills and to improve farmers' capacity to influence markets, negotiate prices, and situate their products appropriately in the market.

cont.

The Luciano Farmer's Association (ASOPROL) is an EC-financed project that is part of the Agricultural Commercialisation Programme. Based in Boaco, ASOPROL was founded in 1994. It channels credit, technical assistance and international aid to its members. The association currently has 573 members, most of whom are basic grain producers from Santa Lucia, and is managed by a board of directors and a secretariat. The Association owns a coffee processing plant. The EC supported construction of the coffee plant and now funds the processing of coffee and basic grains and provides credit assistance.

The programme does not have any explicit gender equality goals. It aims to make profits and does not promote rights or participation at any level. However, there have been certain unexpected benefits as ASOPROL's growth and expansion has generated arenas for women's participation. Three out of seven board members are women. They are elected members and hold the positions of vice-president, treasurer and board member.

Although it lacks an articulated gender approach, this programme has had some indirect benefits for women as regards decision-making power. However, these will remain coincidental and cannot be fully integrated into the programme in the absence of an explicit gender approach, a gender policy in ASOPROL, or gender evaluation targets and indicators.

DFID: Control of Transmissible Diseases Programme

The Central American Control of Transmissible Diseases Programme is implemented in Honduras, El Salvador, Guatemala and Nicaragua. It is part of a joint DFID/ Pan-American Health Organisation initiative covering the period 2000–2003. The programme's official partners are ministries of health in the participating countries, and DFID's collaboration has mainly consisted of purchasing materials. The main areas of intervention are HIV/AIDS, tuberculosis, malaria, dengue and cholera. At the conceptual and programmatic level, the programme does not include community participation in disease prevention but rather focuses on the role of health institutions. The programme has an institutional focus that is backed by the health ministries, and fails to recognise the social aspects of health problems. DFID is providing support for reviewing municipal plans and providing input.

The project in Nicaragua however has a very high level of community participation, unlike the other countries. The project is implemented in the San Judas neighbourhood in Managua and focuses on preventing and reducing dengue fever. Environmental issues play an important role in controlling dengue fever, and both PAHO and DFID are emphasising community participation in preserving healthy environments. The project has a multi-sectoral approach working in coordination with the Ministry of Education, the mayor's office, local churches, the police, the private sector and community-based organisations. The San Judas health centre is responsible for designing and monitoring activities.

Despite some changes in the last phase of the programme, based on PAHO's strategy of promoting community participation in all health interventions, the project has never taken a gender approach and has no explicit gender targets. The project coordinator acknowledged that 'there are no instruments nor methodology that assures that women and men are involved in every stage of the project cycle, nor in the logical framework' (Pasos Marciacq & D'Angelo, 2003: 41-2).

The 'medical-biological' approach of this programme makes it difficult to introduce a gender perspective. This approach does not favour a more comprehensive conception of environmental health, which would involve people not only as project implementers but also as the main subjects in processes related to the quality of their lives. Community participation and in particular the participation of women's groups should be strengthened and social dialogue conducted alongside the technical inputs.

4.2.3 Bangladesh

EC: Adarsha Gram

The Adarsha Gram project is a rural settlement and poverty alleviation programme initially set up and funded by the Government of Bangladesh (GoB) in 1998 and co-financed by European Community aid since 1991. It aims to address the needs of ultra-poor people, and its activities include the distribution of government-owned land to peasant families and the provision of physical infrastructure (dwellings, latrines, ponds for keeping ducks or fish farming). In allocating the land, the GoB has issued a directive to execute deeds in equal shares to husband and wife. The title deeds to houses built under the programme are drawn up in the names of both husband and wife, on equal terms. Widows and vulnerable women are given priority in the selection of settlers. This move extends equal property rights to women who would ordinarily have no hope of owning property and therefore provides them with greater security. The project is currently in its second planning phase.

Although the project does not specifically aim to reduce gender inequality, a key gender-related element of it is the promotion of equal property rights. Women feature prominently in the target group, which prioritises widows, single-parent families, women-headed households and destitute women. Anecdotal evidence suggests that this has increased women's decision-making power in the household: one interviewee said that since they had obtained the house, her husband seeks her permission 'even when he wants to smoke'. This illustrates the shift in gender relations in that particular household. A second aspect of the project is the promotion of income generation activities outside the household (poultry-rearing, bricklaying) in which women have the opportunity to participate.

While the project's extension of equal property rights to women and men is a big achievement, a strategic approach based on detailed analysis of gender relations in the community will be necessary. For example, another interviewee said that she intended leaving her jointly-owned property to her son, not her daughter, because men should inherit property, even though she lives in a jointly-owned property and is enjoying the benefits of gender equality. A bigger challenge is that Muslim law forbids ownership of property by women; property rights are one of the GoB's reservations to its ratification of CEDAW. While this project has good intentions and appears to be beginning to change attitudes in individual households, its success is at risk of being undermined by strong religious and cultural influences. These will have to be addressed with both firmness and sensitivity if women are to be empowered, and the failure of policy coherence on the part of the Bangladesh government will also need to be the subject of dialogue.

DFID: SHAPLA

SHAPLA (Strengthening Health and Population for the Less Advantaged)¹³ fits into the Government of Bangladesh's five-year Health and Population Sector Programme (HPSP). This programme is DFID's support to the HPSP. Both SHAPLA and the HPSP emphasise the health and reproductive care needs of poor women.

A donor consortium led by the World Bank funds the HPSP. Its goal is to contribute to the health and reproductive needs and family welfare of the most vulnerable women, children and the poor. DFID has worked to raise the profile of gender issues and support initiatives for more effective participation by women in health services development and delivery. DFID is considered a lead agency on equality and rights in the HPSP development partner consortium.

SHAPLA consists of eight components designed to support the delivery of an essential services package. The Bangladesh Ministry of Health and Family Welfare manages the projects with support from a number of British organisations. They focus on medical education and training, strengthening the role of nursing, and a public/private partnership to deliver essential service packages.

Significant resources are going into social development across SHAPLA, but DFID's own reviews of the programme have identified the need to strengthen the social development aspects of the sector programme in various ways. SHAPLA is the largest single programme supported by DFID in Bangladesh and as such has a high profile. Its focus on poor women has contributed to the gender strategy process in the HPSP. It has potential to provide a good practice example of a gender focus in a health SWAp.

¹³ Information on this project is entirely document-based.

5 Comparing policy and practice



In all three country studies, examples of good and sometimes innovative gender practice were noted (see, e.g. Pasos Marciacq & D'Angelo, 2003: 32; Macdonald, 2003: 23), but frequent gender policy evaporation between policy statements and strategies and programme/project implementation was still reported. As the South Africa study noted:

The clarity with which gender equality is articulated in specific gender policies is diluted when projects are implemented. Gender equality and the empowerment of women are clearly highlighted in both EU and UK policy documents as issues to be incorporated at all levels of activity. However, this clarity diminishes or is lost altogether in implementation amid an array of competing priorities (Meer, 2003: 4).

This can occur even when gender considerations are well embedded in planning processes. In EC development cooperation in general, gender is a required element in the logframe of every project, and a basic gender analysis is theoretically guaranteed by the submission of a standard gender impact assessment form with every project financing proposal (although the latter has fallen largely out of use in the last few years). In DFID, gender issues must be addressed in the social appraisal that is part of every project memorandum. In practice, however, these mechanisms do not always ensure that gender equality is mainstreamed in project implementation. In Bangladesh, for instance, it was found that often there had been no gender analysis included in the initial ToR for project reviews, or in strategy processes.

Closing the Gap has found that the successful implementation of activities designed to mainstream gender equality depend very largely on the institutional mechanisms for promoting gender equality and on the people involved at all levels. Their commitment, gender knowledge and competence, the gender mainstreaming tools at their disposal, and the resources and support they have to enable them to carry out the policy imperatives of gender mainstreaming meaningfully, are all necessary elements.

This section brings together findings from the three country studies and highlights the issues raised by the country reports. Quotations in the chapter are from the reports unless otherwise indicated.

Institutional barriers to gender mainstreaming

In DFID the main challenge to implementing gender equality seems to be lack of systems and structures ensuring attention to mainstreaming and women's empowerment. Theoretically, all staff are responsible for implementing gender policies, but in practice gender mainstreaming is seen as the preserve of committed or knowledgeable individuals rather than being structurally or procedurally guaranteed. Responsibility for gender is incorporated into work units by means of a network of Social Development Advisers (SDAs).¹⁴ While many SDAs are committed to gender issues, they have limited time and capacity to engage in all projects and programmes. The South Africa study highlighted the very practical problem of time constraints and unmanageable workloads:

According to current work practice, concept notes and project memoranda are sent to all advisers in DFID. This often results in an adviser receiving around '75 emails' a day. As a result, not all cross-cutting advisers are able to provide input. Feedback is arbitrary and often depends on the personal dynamics between advisers.

In the European Commission, the research identified a number of constraints: underresourcing, particularly in human resources; a tendency for gender work to be driven by committed individuals; insufficient gender knowledge; tools and guidance materials produced but not used; heavy reliance on external gender consultants. All these militate against gender mainstreaming. The gap between Brussels and the delegations was also identified as a constraint. In the European Commission, until the recent restructuring, the directorates general for Development and External Relations each had a small gender desk. The restructuring and creation of EuropeAid resulted in a more extensive ensemble of institutional mechanisms which seem to offer good opportunities to ensure gender mainstreaming, including a directorate for horizontal themes including gender, and a gender helpdesk providing technical

assistance. The new structures have clarified responsibilities for gender specialists in DG Development and EuropeAid, but have not addressed the wider issue, common to all donors, of the overall gender mainstreaming roles and responsibilities of all officials working in external relations institutions. The special budget line for the integration of gender issues in development cooperation still exists but has not grown significantly.

Other institutional barriers include lack of resources and decision-making authority on the part of gender specialists to influence organisational practices. The Nicaragua study found that 'those responsible for gender have lacked the resources and power to influence the policies of the organisation'. There is also a lack of political will as senior management regard 'gender issues as marginal'. The Bangladesh consultation found that gender mainstreaming requires serious organisational commitment from managers and individual commitment from staff, especially male staff. Some problems identified by EU delegation staff at the consultations were:

- Staff are not encouraged to consider gender issues systematically or to devote time to them;
- Staff experience a lack of support for gender work from higher levels;
- Staff feel they are not working much on gender, but in the Bangladesh context, they are doing much more than they realise to address gender issues at project level;
- Gender is seen as the responsibility of those female staff involved in gender work; or other committed individuals.

Gender mainstreaming requires designated staff with appropriate skill and expertise. At the same time, senior management support is crucial as there is a tendency to consider those responsible for gender as 'irritants or threats', as one interviewee in South Africa pointed out: 'If gender staff are too strident, they harm their cause'. Without senior management support, gender issues can all too easily be sidelined.

Prioritisation of gender equality in country offices

Although the situation is different in each EU delegation and DFID office in the focus countries, none of them was found to realise fully the expressed policy aim of gender mainstreaming, in which gender equality is considered in every action and by every actor. Prejudice against the idea of gender equality is no longer an issue, but a proactive institutional commitment to gender equality, backed up by informed and effective practice, was hard to find.

In South Africa, specific staff members in both DFID SA and the EU delegation are responsible for ensuring that gender policies are implemented. However, this tends to lead to other programme staff feeling they are not required to take any lead on gender issues, and those who feel strongly about it tend to be marginalised (Meer, 2003: 4). In the EU delegation in Nicaragua, no individual is responsible for monitoring the incorporation of a gender approach in projects, and, in the absence of gender training to underpin gender-sensitive implementation, gender processes at the project level have not been monitored and gender indicators have not been designed or used (Pasos Marciacq & D'Angelo, 2003: 43). The DFID office in Managua has only four staff (Pasos Marciacq & D'Angelo, 2003: 39) who are clearly aware of gender issues, and the office is seeking ways of ensuring that gender is addressed in its work, such as attending an inter-agency gender group, where donors meet to design gender-related strategies. The EU delegation does not participate in this group.

In Bangladesh, the EU delegation in Dhaka is male-dominated and most staff do not prioritise gender. By contrast, the current staff in DFID's Dhaka office contains a good proportion of gender-sensitive people, partly owing to organisational changes initiated by a 'gender champion' and a decision to recruit more gender-sensitive staff.

Even with such efforts, the responsibility for gender is often unclear and diffused: everyone is supposed to take responsibility for gender mainstreaming, but in practice it is left almost entirely to social development advisers. Gender analysis depends largely on the gender champions in the organisation and has not really taken root in project management processes. People working in sections or sectors other than social development tend to be less responsive to gender issues and gender policy requirements. Thus, opportunities to promote gender analysis in programme design have been missed. There are no real rewards or incentives for staff who work seriously on gender issues, and when time is short or pressure severe, gender issues tend to be ignored. National staff need to be more involved in gender work (Macdonald, 2003: Executive summary).

14 The recently completed (2003) restructuring of DFID resulted in a reorganisation around multidisciplinary teams based on issues, most of which have SDA inputs. Importantly for gender, a new post of Senior Gender and Rights Adviser has also been created.

A gap between headquarters and country offices

Some problems of knowledge and communication could be attributed to the deconcentration of cooperation. In Bangladesh, for instance, the interviews and consultation revealed that EU delegation staff feel remote from centrally-produced policy. Unlike DFIDB, the EC's Bangladesh programme does not have a gender strategy produced at delegation level, and delegation staff feel somewhat alienated from Brussels-based policy, speaking of policy directives arriving without notice or consultation. EU delegation staff in Nicaragua also said they had no links with the gender desk in Brussels, nor did they know of its existence (Pasos Marciacq & D'Angelo, 2003: 32). Materials produced at headquarters, such as guidelines and gender manuals seem to arrive late or not at all in the delegations.

Dialogue with governments on gender

The bulk of both DFID and EC cooperation with the three focus countries is government-to-government, and the largest programmes have national ministries as partners.¹⁵ Increasingly, poverty reduction strategies and sector-wide approaches (SWAps) are forming the frameworks for both UK and European cooperation. This direct relationship with governments should offer good opportunities for donors to raise questions of gender equality promotion with partner governments, but the **Closing the Gap** studies indicated that this was more likely to take place in individual projects or programmes than in high-level political dialogue (see e.g. Pasos Marciacq & D'Angelo, 2003: 31). In dialogue between DFID Nicaragua staff and the government on many themes related to the poverty reduction strategy, gender was reported as invariably at the bottom of the list, and was also not an issue of interest for the government. Similarly, a gender review carried out in Bangladesh in 2001 found that DFIDB also needed to become more proactive in detecting and challenging government resistance to promoting gender equality or lip-service in the interests of keeping donors happy.

The situation in South Africa is slightly different. The South African government is not donor-oriented – in 2000 DFID's technical cooperation programme of support to South Africa was worth less than 0.1% of the government's budget. This results in diminished direct donor influence (Meer, 2003: 11).

Both the Nicaragua and Bangladesh reports point out that the most effective gender work is currently done through international NGOs, some (but not all) supported by the EC or DFID. EU delegations in particular tend to devolve relationships with national NGOs to bilateral donors or international NGOs. In Bangladesh, for example, the 2002 Country Strategy Review recognised that specific work on improving the position of women had been almost entirely non-governmental and emphasised the need in the next cooperation period for DFIDB to engage in political dialogue – which should include dialogue on gender equality – at the highest level of government, e.g. in the new PRSP and in SWAps (Macdonald, 2003: 19).

Finally, the concept of gender as a cross-cutting issue is itself not unproblematic. The South Africa study found that:

In both DFID and EC development cooperation practice the need to address up to five cross-cutting themes is experienced by project implementers as leading to undue complexity in project planning. In addition, it is not clear how gender equality should be addressed within other cross-cutting themes such as the environment and HIV/AIDS.

Within DFID this is complicated further since gender equality is not in itself a cross-cutting theme, but is a component of the cross-cutting theme of social development. While DFID requires that all projects take into account the cross-cutting themes, there is no effective procedure to address [them] in projects (Meer, 2003:16).

Where there is an array of cross-cutting issues to be taken into consideration (as is increasingly the case in both DFID and EC cooperation), commitment to gender equality often tends to be diluted, becoming part of a more general commitment to equality or poverty reduction. At worst, cross-cutting or mainstreaming at policy level can be used to take pressure off donors as regards women-specific projects or directing resources specifically at interventions intended to change gender relations. There is an assumption that cross-cutting/mainstreaming is just a state of mind, and costs nothing. When everyone is supposed to take responsibility, no-one does – and in the meantime women-specific projects are downplayed because mainstreaming is seen as the way forward. The Nicaragua country study identified a fall in support to women's organisations along with the growing emphasis on mainstreaming, and concluded that cross-cutting has come to replace support for women's organisations, which is not seen as gender projects (Pasos Marciacq & D'Angelo, 2003: 33). In South Africa, some advisers responsible for cross-cutting themes have found it easier to set up special programmes to address

¹⁵ DFID Nicaragua office, however, provides modest funding to some NGOs, such as *Puntos de Encuentro*, an organisation with a clearly developed gender approach, and has provided gender specialists to support the Civil Coordinator for Emergency Reconstruction (CCER).

a particular theme than to struggle to ensure that all programmes take the theme into account (Meer, 2003:16). This tactic confirms the practical value of the twin-track approach, in which mainstreaming and gender-specific actions reinforce each other.

Gender knowledge and capacity

Ensuring an adequate level of gender knowledge and capacity is a key factor in narrowing the policy-practice gap. In fact, policy evaporation can often be traced to a poor practical understanding of gender, masked by repetition of 'mainstreaming mantras'.

A worrying common finding of the country studies is that DFID and European Commission staff in-country were usually not fully conversant with the gender mainstreaming policies of their own organisations. In both South Africa and Nicaragua, some current EU delegation staff were unaware that the European Commission had a gender policy (Meer, 2003: 4, 17; Pasos Marciacq & D'Angelo, 2003: 43).

At the time of the research some EU delegation staff in South Africa had received no training in the Pretoria office on mainstreaming gender and such training was only one of a range of competing training priorities. In Nicaragua, gender training had been carried out in the DFID office but not among programme implementers. In Bangladesh, European Commission interviewees reported that although the Commission does offer gender training, staff in the delegations were less likely to have the opportunity to do gender training than staff in Brussels owing to time constraints. Information flow to delegations was identified as a particular problem: even the European Commission's own manual for integrating a gender analysis through the project cycle was poorly distributed and many staff were ignorant of it.

Interviewees also acknowledged a lack of common understanding of gender policies and key gender concepts. DFID advisers and EU delegation project officers were not fully conversant with the gender policies, and two EU delegation officials were unaware that the EU had a gender policy at all.

Discussion of innovative approaches to incorporating gender equality as a project goal is lacking, training on project cycle management does not include a gender approach. There is no analysis of the relative situations of women and men and of the ways in which project and programme activities, outputs and results can promote gender equality. Staff spoke of a lack of gender mainstreaming tools and mechanisms to help them guarantee that a gender approach is employed.

The EC-funded project in South Africa illustrates the significant role that can be played by a project officer aware of the gender equality policy and committed to the gender equality goal. This intervention also highlights the importance of dialogue at project level and at the design stage and the importance of identifying barriers to participation and measures to address them:

▶ The project officer could press her case for a quota of women in part because of the EU policy on gender. The EU policy gave her position legitimacy and served as 'ammunition'. As she notes: 'I could put in that quota given that gender is an EU cross-cutting theme'.

Ongoing gender training is key for gender policy implementation. However, gender training needs to go beyond simple 'awareness raising' and should enable staff to apply a gender analysis to their area of work and gender mainstreaming techniques to the project cycle. Training programmes need to explore relevant and effective gender tools, resources and materials. Although there are many gender mainstreaming tools, resources and materials available, there is little evidence that these are applied in programme or intervention implementation. The three country studies showed that despite the proliferation of gender mainstreaming resources, delegations lacked time, skill and commitment to use them effectively.

In South Africa one interviewee pointed out:

▶ We know gender is important. However, we are not clear what it means. We do not know what tools work and we do not know how to monitor so we go the number route. We need training in techniques...We have tools but they are not used.

This sentiment was echoed in Bangladesh:

EU delegation officials said that gender would be included in pre-post training for staff moving to delegations from headquarters, but confirmed that gender training is neither obligatory nor regular. Although the Commission does offer gender training, staff in the delegations get less time for training on a number of areas than Brussels-based staff, so often miss out on training. Information flow to delegations is erratic and ad hoc.

There also appeared to be a general lack of dialogue and discussion on innovative ways to incorporate gender equality goals in programmes and projects.

DFID has made attempts to mainstream gender into training courses, but this has often had the effect of marginalising gender:

DFID officials said that DFID had a good track record of supporting training and staff development, but this does not necessarily apply to gender. In recent years, DFID has not offered specific gender training to staff but is increasingly incorporating gender – often as an optional extra – into other training courses. This has implications for the maintenance and development of gender knowledge and competence in DFID as a whole.

After a review of its training in early 2003, DFID is now rethinking the strategy of mainstreaming gender into its training programme.

On the other hand, the Nicaragua study cautions against one-off training solutions as being unable to 'achieve changes that will translate into concrete [actions] favouring women's empowerment and equality', especially where staff turnover is rapid. Gender training is most effective when used as part of a wider strategy for influencing, and needs to be ongoing, participatory, and followed up to be sustainable.

Gender analysis

Gender analysis is fundamental to gender mainstreaming. Indeed, if gender mainstreaming is mandated for political reasons but is not underpinned by a thorough gender analysis, a wide policy-practice gap can all too easily result, as political mantras (such as the connection between gender inequality and poverty) are repeated but are not meaningfully translated into strategies and actions. This is a key problem discernible in both DFID and the European Commission: gender as a cross-cutting theme is regularly included in strategy papers, but there is little analysis of what this means in practice or how the principle should be implemented. Further, sex-disaggregated information underpins gender analysis. The June 2003 One World assignment for the European Commission (OWA, 2003: section 4.6) found that:

Collecting qualitative and quantitative information is necessary for closing the policy/practice gap. Participatory methods of data collection and a close relationship between data producers and users improve data quality and usefulness. Good working relations with training institutions, gender advocates and practitioners ensures a flow of new ideas and information. Ongoing analytical research assists in challenging established concepts and models and stimulates new ideas and debates.

All data collected by organisations for the purposes of management, planning and monitoring progress should be routinely sex-disaggregated. Best practices should also be identified for both planning purposes and to enrich the necessary ongoing analysis of the impact of gender mainstreaming initiatives.

The Bangladesh country study (Macdonald, 2003c) found that although there were examples of good practice and DFID had benefited from the development of a country gender strategy, there had often been no gender analysis in the initial TOR for project reviews or in strategy processes. Gender analysis depended largely on a few gender champions in the organisation and had not really taken root in project management processes. In the health sector, for example, lack of dedicated social development support to the sector constrained the effectiveness of policy dialogue in detecting and challenging the Bangladesh government's resistance to gender equality. The South Africa EC case study, too, showed that care must be taken to apply a gender analysis to the design of all interventions, even in areas where historically women have not been well represented.

Clarity on gender concepts, goals and gender mainstreaming strategy

Sound and commonly agreed understanding of gender concepts should result in clear goals and a clear strategy for effective gender mainstreaming. Lack of understanding of these concepts and the relations between them can lead to policy evaporation. The South Africa country study (Meer, 2003), for example, found gaps in information, knowledge and capacity among EU delegation staff responsible for implementation. These gaps arose from a lack of clarity regarding gender as a concept, lack of clarity regarding gender equality as a goal, lack of awareness of existing gender policies, and lack of clarity regarding mainstreaming as a strategy. Gender was seen in some (but not all) cases as simply meaning *women*, rather than referring to an analysis of the *power relations* between women and men. Similar conceptual problems were found in Nicaragua (Pasos Marciacq & D'Angelo, 2003):

▶ Real understanding of the concept 'gender' is deficient. Gender is generally confused with women and not understood to mean unequal power relations in society.

The research found that there was often confusion between gender *equality* as a *goal* and gender *mainstreaming* as a *strategy*. This distinction between goal and strategy needs to be clearly understood and maintained from policy and strategy through to operational and intervention stages. Clarity of the goal on paper often gets lost among the concepts and strategies used in practice, especially if women's participation or mainstreaming become instrumental objectives – objectives set in order to reach further objectives such as poverty reduction, but not usually final goals in themselves. Instrumental objectives such as mainstreaming or integration become the focus because it is easier to address processes, procedures and operations rather than tackling deeper structural change, and in this process, sight of the ultimate goal can be lost. Both the OWA European Commission assignment and the **Closing the Gap** studies have also found that both targeting and mainstreaming strategies are required to achieve gender equality goals (OWA, 2003: section 4.1).

Clarity and visibility of gender equality goals at policy and strategy level, but also at operational level of programmes and interventions, is necessary to prevent policy evaporation. The EC-funded initiative in Bangladesh, Adarsha Gram, showed that having gender equality objectives may increase the impact of altering gender relations within households (Macdonald, 2003c; OWA, 2003).

Mainstreaming as a strategy to achieve gender equality

DFID aims to promote gender equality and women's empowerment by developing a gender equality policy and strategy, by mainstreaming gender equality in sector work, and by supporting a range of women-specific projects. The strategic documents produced by both DFID and the European Commission state that they aim to use a twin-track approach to gender equality, supporting specific projects addressing gender or women's issues alongside the mainstreaming of gender in all their projects and sectors.

However, this strategy has not been well translated into practice, partly because mainstreaming is currently seen as more strategic for women's empowerment and therefore a more desirable strategy to use. Mainstreaming is seen as operationalisation of the GAD approach, which gender equality analysts and advocates have promoted since the early 1990s as the best approach for addressing gender equality in the project cycle, whereas support to women-specific projects is often thought to reflect the 'outdated' WID approach. Support to gender-specific projects in areas such as agriculture, transport or infrastructure is relatively rare and more likely to be implemented by NGOs. In Bangladesh, such support has been promoted at the governmental level in the Adarsha Gram project, by focusing on gender within broader projects, but this strategy is not the rule.

The Nicaragua study found that financial resources for women-specific projects were being marginalised in favour of mainstreaming gender in large projects. Also, support to women's organisations had been declining in recent years. The study noted a key drawback to this approach:

▶ Most women's organisations working to empower women and strengthen the women's movement lack any type of financing. The cross-cutting gender strategy [mainstreaming] instead of supporting women's empowerment has replaced it.

In the context of extreme gender inequality, support to women-specific projects coupled with a gender mainstreaming approach is essential if gender equality issues are to be tackled.

The South Africa EC-funded project showed that participation targets are an important entry point for achieving gender equality. While gender-balanced participation does not by itself constitute gender equality, it is necessary as one interviewee pointed out: 'The quota is not sufficient but it's a start'.

Linking gender equality goals to other development goals

Convergence and coherence between gender equality goals and other development goals such as poverty reduction or other cross-cutting priorities are important to the promotion of gender issues. It is now almost routine for development policy and strategy documents to draw explicit links between poverty reduction and gender equality goals: this is done in both the EC's 2001 *Programme of Action for the mainstreaming of gender equality in Community development cooperation* and DFID's 2000 Target Strategy Paper on Poverty eradication and women's empowerment, although strategies whose primary focus is not gender (and PRSPs) tend to see gender equality as instrumental in poverty reduction rather than as an end in itself.

However, other policy priorities sometimes override expressed commitments to gender equality. In practice the lack of clarity about linkages and synergies between policies and objectives identified in the case studies seemed often to spring from competing priorities and contradictory interests on the part of different groups involved, which cannot be solved by technical and administrative initiatives, as the South Africa study highlights:

Cross-cutting appears to complicate the task. In both DFID and European Commission practice, addressing five cross-cutting issues is seen as including competing priorities in project planning and implementation. Attention to gender issues is lost among the range of priorities and it is unclear how gender equality should be addressed within other cross-cutting issues like HIV/AIDS or environment. The interconnections between priorities are not explored and are seen as 'getting in the way' of achieving project goals, rather than seen as enhancing project goals.

Both DFID and the European Commission have produced gender manuals which aim to help practitioners mainstream gender into programme design and the project cycle, but they are poorly disseminated, especially in the field, and are therefore underused. And they do not address the question of how to accommodate an array of cross-cutting themes without losing sight of any of them. So, while there is enormous pressure on staff to prioritise cross-cutting issues, the tools and guidelines for how this should be done are not readily to hand. Given their limited time and resources, it becomes impossible for staff to include all cross-cutting priorities:

In practice, in both the European Commission and DFID, the cross-cutting strategy has been mostly limited to policy declarations since gender tools are not used in studies, planning or monitoring nor have concrete gender goals been identified.

Although gender is recognised as a cross-cutting issue, it is not treated that way in practice; in DFID, for instance, it tends to be regarded as the province of social development specialists only, and institutional responsibility for ensuring a gender focus in project documents (and implementation) rests heavily on social development specialists. In DFID Bangladesh, this is possibly the greatest challenge facing the institutionalisation of gender issues:

The links between poverty reduction and gender equality goals are... not regularly made. This problem is not unique to DFIDB but pervades the institution, because gender is 'ghettoised' into social development at all levels. Fortunately, the current livelihoods team is keen to learn about gender and how to implement gender equality.

Another difficulty in this respect concerns the horizontal links made between departments or individual staff members, as the South Africa study found:

A key difficulty noted by DFID interviewees was that cross-cutting theme and sector specialists tend to be 'boxed in' to their own discipline, so they tend to talk across each other. While attempts were being made to work in teams in order to break down these divides across disciplines, this is no easy matter given the way 'people are trained and how they think'.

Lack of policy coherence is particularly noticeable at the intersection between gender (and even poverty) issues and economic and trade issues. By and large economic and trade policies do not contain any gender analysis.

The South Africa case study on restructuring state-owned enterprises highlighted how gender policies can clash with economic policies:

The gender policies of the UK and the EU are located within economic paradigms that see the market as the most effective means of reducing poverty. However, such policies promote market liberalisation and privatisation of state assets, which adversely affect poor women.

Similarly in Nicaragua:

Important efforts are underway to coordinate different EU policies. An attempt is being made to guarantee consistency between EU trade policies and development projects and programmes supported in Central America [but] gender policies remain excluded from this process. There is no discussion on how a trade policy affects men and women [differently].

These failures of coherence lead directly to a deep gulf between gender policy and practice. Yet convergence, linkage and synergy between policies is possible and can connect different priorities in ways that advance gender policy goals. The Adarsha Gram project in Bangladesh is a case in point: it links poverty reduction and gender equality goals with positive outcomes for poor women. While gender equality goals can connect with other cross-cutting priorities, such links must be made with the proviso that gender equality is not lost in the convergence strategy.

Aligning financial and human resources with policy commitments

A key challenge to implementing gender policies is the lack of adequate **financial resources**. All three studies showed a mismatch between policy commitments and resource allocation. Without adequate financial and human resources, gender policies remain rhetorical commitments. Section 2 above shows how national gender structures, programmes and interventions are under resourced, leading to ineffective implementation of policies and legislation. Donor commitments to gender equality expressed in policy or planning documents must be backed up with adequate – and ring-fenced – budgetary resources both to fund gender- or women-specific activities and to support mainstreaming activities including gender analysis, structural change, training, capacity building, tools, guidelines, monitoring and evaluation, as well as innovative, catalytic work. The ‘added value’ of funding gender programmes that link poverty reduction and gender equality goals should be made clear.

The need for specific gender budgets, however, does not diminish the crucial importance of analysing the impact of mainstream budget allocations, including national budget allocations, on women’s and men’s lives. Gender budget analysis can serve as a powerful tool in advocating for changes or shifts in public expenditure to match policy goals.

Matching policy commitments with **human resources** is also key for effective gender policy implementation. Gender cannot mainstream itself and should not be left to the good will and commitment of a few staff. The research in Bangladesh showed that while DFIDB had made enormous progress in mainstreaming gender institutionally, there were cutbacks in staff leading on gender:

DFIDB staff interviewed for **Closing the Gap** regarded as an advantage the fact that DFID has no centralised or specialised gender unit; this meant, it was thought, that gender concerns have been seen as part of a broader mandate for social development. This is open to question in principle; but also, the capacity to implement gender policies has been reduced in the immediate sense by the reduction in senior-level Social Development posts in DFIDB from four to three.

This reduction implies that the policy emphasis on social development in general and gender in particular is not reflected in the allocation of staff resources, and puts the seriousness of the stated commitment to gender equality into question. But there are also positive moves towards more gender-sensitive staffing in DFIDB, as noted earlier.

Monitoring and evaluating gender policy implementation

Monitoring and evaluation are essential elements of gender mainstreaming and closing the gap between policy and practice. Effective monitoring and evaluation is an ongoing and continuous process and must be underpinned by sound sex-disaggregated statistics and indicators to enable appropriate performance measurement. Having effective and easy-to-use systems and procedures in place for monitoring and evaluation might encourage systematic use of tools. The identification of concrete short-term objectives alongside longer-term goals is also important.

The research in Nicaragua found that gender indicators did not feature in the European Commission's monitoring and evaluation processes:

An overall evaluation of EC cooperation with Nicaragua conducted in 2000 did not use any gender indicators whatsoever. [In project implementation] gender tools are not applied during any stage of the project cycle. They are not applied to diagnostic, planning or evaluation processes. The EC Country Programme Evaluation (1999-2000) did not use any gender indicators, nor did it make any gender recommendations.

In South Africa, the research found that there were attempts in the EC programme to address gender concerns in evaluations, but these had been limited owing to the difficulty of identifying gender indicators. The only indicator currently used being the number of women involved in a project. One interviewee commented: 'Monitoring tends to be a numbers game. The role women are playing is not monitored. Evaluation has to look at less easily measured indicators.' Gender equality was not integrated into country strategies and reviews at all, beyond descriptions of aspects of women's disadvantage in situation analyses.

By contrast, DFID's programme in Bangladesh has benefited from a particularly systematic process of review and feedback as regards gender since 1999. There have been specific gender reviews, and there is evidence that their results have been fed into general evaluations of the programme such as the 2002 Country Strategy Review.

Using education and health as proxy indicators for gender equality is problematic. Narrow equation of progress toward gender equality with girls' education and women's reproductive health fails to capture across the board global commitments to gender mainstreaming. These 'soft' indicators are often used to mask the lack of gender analysis in 'hard' cooperation areas such as trade.

Deconcentration

European Commission deconcentration involves the decentralisation and devolution of decision-making from Brussels to country EU delegations. This offers both opportunities and threats for gender policy implementation. Although it creates opportunities for innovative, context-specific gender work, it runs the risk of marginalising gender. Because delegations have greater autonomy in decision making, the risk that gender work may be sidelined is a real one if delegations do not consider gender a priority in their interventions.

Bangladesh became a deconcentrated EU delegation in 2002. This gave it greater responsibility and autonomy in managing the Bangladesh programme, but also further widened the gap between Brussels and Dhaka in terms of information, consultation, and support. In the view of delegation staff at the April consultation, policy emanating from Brussels (including gender policy) seems to have been produced without sufficient reference to actual practice or sufficient consultation with overseas staff. Staff therefore tend to regard it as irrelevant to the practical problems arising in their daily work. Further, staff at delegation level often lack basic knowledge not only of the content of policies in general but of how and by whom they are made. When they do receive draft policy documents from Brussels, the time allotted for feeding back comments is often inadequate; and when delegation staff do give feedback, there is often no response at all or a very delayed response – a further disincentive to staff to take part in such consultation as exists.

As regards the trend towards decentralisation in DFID – also seen most clearly in Bangladesh – according to DFIDB staff members, the locus of DFID's gender-related work in practice has shifted from London to Dhaka with the establishment of an aid management office. Much innovative work is being done by working at country level: Bangladesh is a good example of this trend.

This perception of policy 'falling from above' without warning, explanation or consultation reflects a wider concern with policy transparency. Staff have noted that it is not clear how either DFID or the EU makes policies: where the original impetus comes from, what discussions are held with either the Southern countries or the EU member states involved, and with what stakeholders in those countries, or what the drafting, revision and approval processes are. It is true that EU policy makers do keep a distance from CSOs and NGOs; but civil society could do more to raise issues of impact, accountability and transparency with donors and to support beneficiaries in gaining the knowledge and skills necessary to engage in policy dialogue with donors (e.g. legal/rights literacy, economic literacy, advocacy skills).

In the context of increased decentralisation and devolution, special attention needs to be given to strengthening mechanisms of accountability as regards gender at delegation and country office level. Country gender action plans would be valuable to clarify priorities and objectives, and for accountability and monitoring purposes.

Involving men

In recent years, the body of knowledge examining the role of men in achieving gender equality has been growing. In the context of development agencies, this argument has particular significance because of the critical and dynamic culture of development. Both men and women in donor institutions need to work together, both at headquarters and in country programmes and offices, to ensure that gender analysis underlies their work and that gender-sensitive aid results in the improvement of women's lives.

While it is important and necessary to ensure that delegations and country office have male staff working on gender issues, the Nicaragua study shows that European donors currently prefer to support gender projects that work equally with women and men. NGOs that do not work with men have been excluded. (On the other hand, DFID supports a project in Nicaragua working specifically with men.) This suggests a failure to grasp the underlying principle of the twin-track approach to gender mainstreaming – the idea that strategies aimed at reducing the inequalities between men and women are as valid when working with women only as they are when working with both women and men.

Dialogue and networking

In addition to policy dialogue at government level, networking by donors with organisations engaged in gender work is important and needs to be strengthened. Non-governmental organisations are a source of information and most are well placed to do research and advocacy work. As part of the **Closing the Gap** project, One World Action conducted consultations in South Africa, Nicaragua and Bangladesh with organisations involved in gender equality and equity work. A key issue arising from the consultation discussions was the need to strengthen existing linkages and build coalitions among civil society organisations, government and donor agencies engaged in gender mainstreaming at national and regional levels. The consultations themselves provided forums for networking and exchange.

While there is a wealth of useful civil society dialogue at the Brussels level, the **Closing the Gap** research shows that formal and informal structures for dialogue between EU delegations and civil society are underdeveloped.

▶ In Bangladesh, civil society dialogue and participation with the EU delegation is weak in general and tends to be most noticeable in NGO-implemented projects.

In Nicaragua, both the EU and DFID lack a tradition of dialogue with CSOs. In particular, EU delegation staff are not part of the inter-agency gender groups where donors meet to coordinate actions that support gender work. These forums could also be used for donors to give information about their gender policies. This poses particular barriers to women's CSOs wishing to enter into dialogue with the EU, especially at high levels. The Cotonou Agreement has opened up new possibilities for dialogue that are only now being explored. In particular, one major feature of the Cotonou Agreement is the right of non-state actors (NSAs) (civil society, NGOs, private sector, trade unions, and local authorities) to participate. The agreement recognises their important complementary role and states that NSAs will have access to financial resources and be involved in the planning and implementation of programmes.

By contrast, DFIDB has held consultations with women stakeholders in the preparations for its new Bangladesh Country Assistance Plan (CAP). As a result, the CAP is expected to be much more gender-responsive than its predecessor, although the challenge will still be to carry these strategic intentions into practice.

The DFID office in Nicaragua has made efforts to engage in dialogue with civil society, in particular around civil society consultation on the poverty reduction strategy ERCERP (Strengthened Economic Growth and Poverty Reduction Strategy). The ERCERP strategy was developed in consultation with civil society organisations, including women's organisations. However, the consultation methods are generally considered by Nicaraguan CSOs to have been unsatisfactory, and CSOs and the women's movement view the ERCERP as a government proposal that disregards the numerous civil society and private sector initiatives currently under way in Nicaragua. The framework of the ERCERP is seen as a missed opportunity to strengthen these initiatives. The women's movement is particularly critical of the ERCERP for its failure to offer resources to national organisations working against violence and for women's empowerment or to address various demands related to human rights and democracy.

6 Recommendations



Accountability and transparency

Both the European Commission and DFID should strengthen accountability systems, processes and procedures at HQ and delegation or country office levels. Vertical and horizontal accountability for gender mainstreaming (in the form of an accountability matrix), enabling clear location of responsibility, is recommended. This involves drawing up a clear organisational chart that communicates defined roles and responsibilities with their corresponding accountability.

Both the European Commission and DFID should clearly define and express their expectations of delivery in performance appraisals, work plans and reports. Clear guidelines on accountability to governance structures, annual reports, and expectations of reporting on progress would enhance transparency and good governance. Strengthening transparency, consultation and information sharing in policy development is key in this regard.

In the context of increased deconcentration, special attention should be given to strengthening mechanisms of accountability in EU delegations and DFID aid management offices. The European Commission and DFID should consider developing country-level gender action plans as a valuable tool to clarify priorities and objectives, and for accountability and monitoring purposes.

Conceptual clarity

Gender equality goals should be made explicit and visible at policy, strategy and operational levels. In particular, each programme and intervention should have an explicit gender equality goal.

Clarity should be developed on key gender concepts, gender equality as a goal, and on strategies to meet this goal, including gender mainstreaming.

The twin-track approach should be reaffirmed in the light of a clear understanding of gender equality goals and strategies. While it is necessary to mainstream gender in development cooperation, support to specific initiatives that ensure women benefit from development processes should continue.

Linking cross-cutting policy priorities

The relationship between gender equality and other cross-cutting themes should be clarified in policy development processes. In the light of this understanding, linkages between gender equality and other goals, such as poverty reduction, should be made with the proviso that gender equality is not lost among competing priorities.

Linking cross-cutting themes should be seen not simply as a policy requirement but as a necessity to achieving overall programme/project goals.

The European Commission and DFID should emphasise the coexistence and interrelationship of cross-cutting policy priorities at strategy level in country programme while at the same time promoting operational clarity regarding gender within specific interventions.

The European Commission and DFID should explore fully the potential of sector-wide approaches for promoting gender equality.

Policy coherence

The EU and the UK should strive to maintain coherence between their policies on gender equality in development cooperation and the overarching development policy framework within which gender and development policies are located.

Policy objectives related to poverty reduction, trade and the promotion of economic growth in partner countries should be consistent with the gender equality goals expressed in both donors' institutional gender equality policies and their policies on gender equality in development.

Analysis and strategy

Rigorous, detailed gender analysis should inform all development planning processes and all aspects of programmes/projects should have gender equality goals. A gender analysis should be applied to:

- Policy frameworks such as country, regional or sectoral strategies;
- Sectoral and macro-level policies, including poverty eradication;
- Design and implementation of programmes and projects (e.g. via logical frameworks);
- The institution itself – systems, structures, work practices, policies and procedures.

Both the European Commission and DFID should put more systematic effort into the collection and use of sex-disaggregated statistics as a quantitative basis for their gender analysis. Attention should also be given to qualitative gender analysis in raising awareness, informing policy makers, planning and training, and analysing the impact of gender mainstreaming initiatives and development cooperation in general.

To facilitate theoretical research and analysis and inform their own policy and practice on gender, the European Commission and DFID should build and maintain close relationships with gender research and training institutions, gender advocates, and academics and practitioners in areas of gender, women's human rights and development.

Both the European Commission and DFID should continue to utilise fully and consistently the twin-track strategy for meeting gender equality goals. Mainstreaming and other strategies to include gender equality goals in all development cooperation should not preclude specific support to women's projects and to strengthening the role of women as a constituency in civil society.

In particular, the European Commission and DFID should continue to support activities that focus specifically on empowering women in the context of extreme gender inequality in Bangladesh and Nicaragua.

Matching policy commitments with organisational structure

Policy priorities should be reflected in organisational structure. Gender equality goals cannot be achieved only by technical means such as gender-sensitive policies and procedures. A political process, involving changes in hierarchies of power within organisations, changes of organisational goals and new ways of working, is also required.

The European Commission and DFID should continue to devote attention to internal institutional development and capacity building geared towards their own development as more gender-responsive organisations. They should recognise that orientating organisations to implement gender policies is a long-term task, involving technical and political changes, a multifaceted approach, involving men as well as women, working in partnership and networking, and institutional lesson learning.

Senior management in both the European Commission and DFID should show active commitment to the goal of gender equality in their internal and public statements, and should provide support to the development of institutional gender capacity (e.g. appointing gender specialists, training initiatives, knowledge building). Senior level commitment, leadership and support – achieved through training, exposure sessions and information analysis – should be visible and unequivocal.

Staffing and capacity

Successful gender mainstreaming requires designated staff with appropriate gender skills and expertise. The mainstreaming requirement for all staff to be gender-competent is not a substitute for dedicated gender staff at decision-making levels. The European Commission and DFID should ensure that they have such staff in strategic positions.

To ensure that practical implementation of gender policy does not rely exclusively on Social Development Advisers (DFID) or social experts (European Commission), both institutions should include appropriate gender knowledge and expertise in the requirements for new staff recruited and in the TOR of consultants. If such expertise proves difficult to find, it could be developed through training and on-the-job learning.

Alternatively, staff should know where to access gender expertise and knowledge within the institution. This would make all experts responsible for achieving social goals. Both the European Commission and DFID should proactively build on and expand their existing information systems on gender issues.

Staff with lead responsibility for gender should have adequate support systems including financial resources, senior management support, continuous training and gender sensitive work practices. In turn, such staff should offer support, guidance and advice to ensure that institutional knowledge and capacity is developed and sustained.

Senior staff should take responsibility for cross-cutting and mainstreaming issues

Matching policy commitments with resources

Both the European Commission and DFID should devote adequate and sustained financial, human and time resources to the activities essential to closing the gap between policy and practice, both at headquarters and in their respective field structures.

Policy commitments to promoting gender equality must be backed up with adequate budgetary provision to fund general and specific initiatives. Specific budgetary allocations for gender mainstreaming are essential to fund innovative catalytic work and gender mainstreaming initiatives.

To inform planning exercises, both the European Commission and DFID should consider undertaking a gender budget analysis of their development cooperation in order to obtain a clear assessment of the resources necessary to implement gender mainstreaming.

The European Commission and DFID should incorporate gender budget analysis into their monitoring and evaluation processes, as a vital tool in examining both the impact of budget allocations on the implementation of EU and UK gender mainstreaming policies and the impact of development cooperation and external relations activities such as trade on gender equality.

Both the European Commission and DFID should:

- Consider applying a gender budget analysis to development assistance channelled through direct budgetary support;
- Develop systems for monitoring budgetary support processes including gender indicators;
- Work toward strengthening the gender perspective in PRSPs and CSPs;
- Establish separate budget lines or targets for gender activities within budget support processes;
- Supporting government and civil society initiatives on gender budget analysis.

Training

Both the European Commission and DFID should conduct gender training at both HQ and delegation or country office levels, aimed at deepening understanding of gender relations in the country context.

This should apply to both levels, so as to help narrow the gap between HQ and field.

Both the European Commission and DFID should consider making gender training (involving discussions on concepts, tools and strategies) compulsory and fully integrated into all pre-posting training.

Particularly in delegations/country offices, both the European Commission and DFID could explore less formal training methods, such as inviting external speakers from NGOs or universities to address staff, brown-bag lunches and networking opportunities.

In order for training to be effective, DFID and the European Commission need to develop ways to evaluate and test if/how training is used in work. Tools and guidelines must be relevant, effective, simple and user-friendly. In short, gender training should be:

- specific and relevant to the work of individuals and appropriate to their role in the organisation;
- institutionally supported from the top;
- adequately resourced;
- followed up regularly to ensure that knowledge and expertise in this area is maintained;
- continuously evaluated.

Monitoring and evaluation

Monitoring and evaluation is an ongoing, iterative process that requires attention at all levels.

At the **institutional** level, this should include:

- systems and procedures for monitoring staff performance in implementing gender policies should be designed and applied;
- gender equality goals should be incorporated in the job descriptions and work plans of staff and they should be monitored and appraised accordingly;
- in both the European Commission and DFID more systematic and comprehensive supervision of gender policy implementation in both field and central offices is needed.

At the **project management** level, it should include:

- gender equality goals should be included in both the project logical framework and the Terms of Reference (ToRs) for implementation staff, including external consultants;
- gender equality should be identified as a policy priority in projects and as an objective in project conceptualisation and implementation;
- project proposals should include a gender impact assessment form. The European Commission should reinstate the regular use of this form;
- staff with experience, capacity and decision-making authority should monitor gender policy implementation during the entire project cycle and define targets and indicators to measure success.

Both DFID and European Commission should consider conducting independent annual gender reviews of their respective development cooperation activities, building on the good examples provided by some country offices, whose gender reviews have resulted in a perceptible improvement in policy implementation.

Both the European Commission and DFID should intensify their efforts in documenting, highlighting and disseminating good practice examples in accessible forms, so as to encourage ongoing efforts to integrate gender equality issues into operations and institutional lesson learning. The work of EU member states, other bilateral and multilateral donors, and European and Southern NGOs offers many examples of good experience and valuable lessons. In addition to highlighting the challenges we face in mainstreaming gender, this method also allows critical lesson learning.

Civil society participation

The European Commission and DFID should identify key partners and interlocutors in civil society and government and set up formal and informal information exchange opportunities (e.g. workshops, seminars, conferences) to encourage buy-in from various stakeholders and interest groups and create a more enabling environment for promoting gender equality and equity. Such forums of exchange could enhance understanding of UK and EU gender policies and the challenges for implementation.

Civil society organisations should also seize the opportunities offered by donors to make inputs into development cooperation policies and advocate for the expansion of such opportunities.

Dialogue, partnerships and networking

Both the European Commission and DFID should proactively increase their dialogue, partnerships and networking around gender mainstreaming work at many levels. There should be dialogue with government for ownership, dialogue with other donors, dialogue and networking with a diverse range of non-state actors and women's organisations.

Greater donor coordination is required to promote gender equality policies and mainstreaming in practice and to help make gender mainstreaming more consistent in practice across a range of donors. The European Commission and DFID should build on its own positive experience of donor networking.

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