Executive Summary

This manual is intended to serve as a guide to governments and other organisations that are seeking to advance gender equality and equity through the mainstreaming of gender in development planning. Gender mainstreaming involves addressing gender inequalities in all aspects of development, across all sectors and programmes, especially in decision-making structures. The Commonwealth model for achieving this is the Gender Management System (GMS), an integrated system of structures, mechanisms and processes for advancing gender equality and equity.

Current indicators of development in most regions reveal that women remain the majority living in poverty (especially in rural areas), are victims of all types of violence, generally have lower literacy rates than men, and have experienced the least improvement in their quality of life. But few concrete attempts have been made to address the root causes of gender inequalities and the continued economic exploitation of women, even though women's paid and unpaid labour contributes significantly to the social economy and production processes.

Comprehensive planning systems have tended to fall out of use because governments assume that market forces increasingly dictate the pace of growth and development in the private sector. Increasingly, there is an uncritical acceptance of alternative approaches to planning, such as incremental planning, partial planning, or strategic planning. This has resulted in minimally regulated economic and social institutions and marginal state intervention in the market, with little benefit for those (usually women) who operate outside of the formal markets.

Many developing countries have adopted an anti-cyclical planning process that is supply-driven, technologically efficient and profit-oriented, seeking to achieve the full use of a country's resources for social and economic progress through existing institutions and systems. The anti-cyclical planning approach tends to have a negative impact on social development and gender relations, with increasing gender inequalities, joblessness for women and the 'feminisation of poverty'.

This manual understands development as including the concept of human development, which is measured not only according to economic indicators such as gross national product (GNP) but also according to other indicators. These include health (life expectancy) and education (literacy and enrolment) which together with purchasing power provide the basis of the UNDP's Human Development Index. In analysing gender inequalities, the GMS includes the human development indicators and looks further, to such areas as participation in political decision-making and the appropriateness of legislative and administrative systems.

Gender planning prioritises the needs and conditions in which women live and work as a site for change. It involves a critical analysis of the gaps between women's and men's access to economic, social political and cultural resources. This analysis enables the development of policy initiatives to correct the imbalances – including cases where men are not benefiting equally from the development planning approaches currently in use.

Gender planning should not be seen as a separate, parallel process to mainstream development planning but should transform mainstream planning to address the needs of women and poor people generally through an economically, socially and environmentally sustainable process.

Approaches to Development Planning and Gender Analysis

In efforts to respond to the needs of women, the Women in Development (WID) policy framework emerged in the mid-1970s. The WID approach in development planning sought to 'add on' women-specific projects to existing activities. Failing to address the systemic causes of gender inequalities, this approach tended to view women as passive recipients of development assistance, rather than as active agents in transforming their own economic, social, political and cultural realities. It was therefore usually gender-blind and ultimately biased against women.

The Gender and Development (GAD) framework emerged in response to these flaws. It recognises that improving the status of women is not a separate, isolated issue but needs to be addressed by taking into account the status of both men and women, their differing life courses and the fact that equal treatment will not necessarily produce equal outcomes.

Because men and women tend to have different roles and responsibilities, they also have different needs, identified as practical and strategic gender needs. Practical gender needs emanate from the actual conditions people experience due to the gender roles ascribed to them by society. Strategic gender needs point to what is required to overcome the generally subordinate position of women to men in society and relate to empowerment. Planners generally respond only to the practical needs of women without relating these to their strategic needs. A twin approach is required which identifies the links between practical and strategic gender needs, and proposes policy and planning frameworks to address both within institutions.

The State of Development Planning

This section examines the major issues in development planning, identifies some gender-related problems that can arise, and points to possible solutions through suggested action points that governments may wish to adapt to national circumstances.

Political will and adequate resources

Some governments do not have an overarching policy or framework which could be used to guide the promotion of gender equality. Many others take a Women in Development approach which fails to address the root causes of gender inequalities. Where gender policies do exist, they are often hampered by a lack of political will and authority to guide their implementation. Without an explicit gender policy to provide guidelines on how government departments should institutionalise gender internally or respond to the needs of both women and men in society, planning agencies are not obliged to implement, monitor or evaluate gendered development goals. Governments are also constrained by a lack of qualified personnel and administrative capacity to implement gender plans.

Action points:
+ advocate for political commitment at the highest levels;
+ promote participatory democracy and decentralise planning processes.

Development planning and macroeconomic policy

Traditional methods of development planning tend to be based on efficiency and control and to be driven by a focus on growth. Many governments introduced development planning structures and systems as a means of ensuring that macroeconomic goals were attained. Infrastructural development and services within

the development plan were driven by economic goals rather than the need to advance human development. In the process of attaining economic growth, the social development of people and particularly of women has often been neglected.

Action points:
+ set women's economic empowerment as part of macroeconomic goals;
+ accord value to women's work;
+ use appropriate sex-disaggregated data;
+ analyse the impact of economic, structural adjustment programmes;
+ a critical gender analysis of the root causes of social problems is essential.

Institutional concerns

Planning tends to have a sectoral bias which results in a fragmented, compartmentalised approach and ignores cross-cutting gender needs and concerns. This problem is compounded in many countries where no single authority or agency takes the responsibility for implementing the country's overall development programme. As a result, the failure to meet the needs of women in the different sectors is not evaluated.

Action points:
+ integrate strategic gender needs through effective co-ordination of planning cycles;
+ establish structures and mechanisms to advance gender equality;
+ recruit women as well as men into the planning field;
+ introduce gender policy/planning training into planning agencies;
+ ensure that systems of governance and planning are accountable, transparent and accessible;
+ promote participant involvement in monitoring and evaluation.

Public and private spheres

Where an attempt is made to improve the position of women, this is usually in the public sphere and does not necessarily result in changes in gender relations within the home. Power relations in the private sphere are among a number of factors contributing to women's failure to make effective use of changes in the public sphere to advance gender equality.

Action points:
+ ensure that primary, secondary, tertiary and continuing education curricula and processes are gender-aware;
+ promote the potential of development projects in all sectors to change ethnocentric gender stereotyping.

Mainstreaming Gender in Planning Cycles

Gender-aware policy and planning are important tools to effect a positive change in women's conditions. Gender-aware policies and plans are more likely to respond to deep seated patterns of discrimination against women when women themselves collectively analyse and contribute to policy-making and planning processes. In cases where men are not benefiting equally from development planing strategies, a gender-aware approach enables interventions to correct the imbalance.

There are usually four major planning cycles through which most developing countries seek to respond to national needs and issues. These are: the macro/sectoral policy cycle, the budget cycle, the aid cycle and the project cycle. These cycles when

brought together through a planning process usually reflect a government's medium term (5-10 year period) expenditure plan.

In establishing macro policy frameworks, gender analysis and outputs need to be included to ensure effective policies which address the needs of all sectors of the population. Approaches to policy-making which influence gender outcomes can be categorised in three types: gender-neutral, gender-specific and gender-aware/redistributive/transformative. Generally policy and programme interventions could fall within a welfare, equity or transformation/empowerment approach. A welfare approach usually responds to meeting the practical needs of women (gender-specific), whereas a transformative approach responds to meeting strategic needs (gender-transformative).

The potential of gender policy to transform gender relations and the gender-biased distribution of resources is greatly enhanced if that policy is developed through a participatory process involving key decision-makers within the department concerned and in other related sectors, as well as with the groups and communities the policy is intended to benefit.

In the preparation of a gender-aware medium-term development plan, 'engendered' inputs from the macro and sectoral policy planning cycles can be combined to produce a medium-term plan of expenditure which then informs the preparation of annual budget expenditures. These then feed into the project cycles in the various sectors.

Tools for Gender Mainstreaming in Development Planning

Access to relevant sex-disaggregated data has been identified as an important element in mainstreaming gender into development planning. Gender-sensitive indicators are potentially of great usefulness in integrating gender considerations into development planning. However, it should be recognised that there are limitations on the amount and type of information they can provide, and that care needs to be taken in their interpretation.

The Commonwealth Secretariat has developed a series of policy options for integrating gender into national budgetary policies in the context of economic reform. The policy options centre on six possible tools:
+ sex-disaggregated beneficiary assessments;
+ sex-disaggregated public expenditure incidence analysis;
+ gender-aware policy evaluation of public expenditure;
+ gender-aware budget statement;
+ sex-disaggregated analysis of the impact of the budget on time use; and
+ gender-aware medium-term economic policy framework.

Two Commonwealth Approaches to Gender Equality

This section looks at some general indicators on the situation of women in two Commonwealth countries, India and South Africa, and efforts by governments to advance gender equality in those countries. It also develops a typology of these countries' planning responses to gender.