Gender mainstreaming: conceptual links to institutional machineries

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We enter the new millennium with a quarter-century of experience in reflection and practice about women and subsequently gender in development. This experience builds on the voices of many diverse people who share stakes in and support a broad definition of development, used here to mean the enhancement of human capacity in a world that sustains, rather than undermines, its natural resources.¹ Such enhancement can hardly occur in a world lacking good governance, a world with more than a billion people living in desperate poverty, or a world with so much violence and personal insecurity that it disrupts the everyday lives of innocent bystanders, many of whom are children.²

This chapter reviews and acknowledges the emergence, development and increasing sophistication of that body of knowledge and action associated with integrating women and then consolidating the attention to gender in institutional core missions and strategies. These strategies are pursued in the complex political and bureaucratic policy-making contexts, wherein decisions are made every day that embrace and ensnare men and women alike, but that *always* affect them differently given historical and persistent gender inequality. The multiple contexts and institutions by definition defy uniform recipes about internal institutional *processes*.

Process and results are quite different. Although no one best strategy exists to consolidate gender-fair results in the mainstream, world conferences and global mandates clearly focus on gender equality outcomes. As far back as 1970, advocates initially called for women to be integrated into select policies. After a considerable transition in thinking

and action, advocates now call for gender to be embedded in *all* policies. Gender equality outcomes cannot occur in sideline, peripheral units — the usual predicament of women's bureaus and ministries, often called 'machineries'. Gender equality must be addressed in the budget and institutional core of mainstream policies and agencies. Gender analysis should be as central to mainstream policies in employment, enterprise, agriculture, criminal/civil justice and education as mainstream attention should be to once sidelined 'women's' issues such as domestic violence and reproductive health (see Staudt, 1998). Yet advocates must start somewhere, and that somewhere often begins in national machineries.

However, to celebrate multiple strategies is not to praise our still-lacking means of measuring the *policy outcomes* in meaningful ways at the global, national and local levels — means that respect the rich and diverse historical and multi-cultural realities of those grandiose to minuscule spaces. While we enjoy the complex and profound thinking of those who measure human development, from sex disaggregation to empowerment (the GDI and GEM³), these quantitative scores still leave us with gaps in understanding gender inequality in ways that are difficult to reduce to numbers. Moreover, empowerment measures should be linked to poverty reduction, given women's over-representation below poverty lines. To count some women in economic and political decision-making positions does not necessarily connect to power relations that relegate many desperately poor women to lives stripped of entitlement and endowment.⁴

Preliminary global perspectives, grounded in governance institutions

Socially constructed categories perpetuate inequalities. The most persistent of these categories that perpetuate inequality include nationality, gender and class. According to the annual UNDP *Human Development Reports (HDRs)* of the 1990s, global disparities in wealth are not only marked, but worsening, with income ratios between the top and

bottom fifths of the world population rising from 30:1 in 1960 to 78:1 in 1994 (*HDR*, 1997:9). To be born in Swaziland versus Switzerland makes for profound differences in life opportunities and circumstances. *HDRs* methodically count, measure and compare national differences. But gender threads itself through unequal national relations in ways that are hardly visible to those who count and measure. A United Nations (UN) report circulated for the 1985 United Nations World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace, held in Nairobi, focuses on the structure of opportunities and endowments: to paraphrase, women provide the majority of labour, are formally counted as less than a third of employees, earn a tenth of income and own 1 per cent of the land (see Baden and Goetz, 1997). We need to make unequal gender lines as prominent in analysis as national lines to poverty reduction outcomes.

Although global perspectives provide a framework for understanding the full dimensions of inequalities, global citizens have limited political spaces in which to share voices about regional and international trade agreements, capital flows and computerized trading. Instead, decisions are made at the commanding heights, behind the closed doors of corporate and selective government and international bureaucracies. What we *do* have are those nearly two hundred nation-states, non-governmental organizations (NGOs), and bilateral and multilateral technical assistance organizations that range in their degrees of openness and responsiveness. These institutions operate in more or less accountable ways. For these reasons, *good governance* — whatever the institution — is a necessary condition from which to act on gender equality.

Good governance matters a great deal. Much ink has been spilled over what that means, ranging from the narrower international banking approach ('honest governance that facilitates market transactions') to broader approaches that emphasize increasingly democratic spaces in which people exercise voice and power to hold officials accountable for their decisions. A majority of countries claim to be democratic, but thus far democratic accountability has rarely operated with vigour for most women, the working

class and/or the unemployed. Contemporary thinking on democracy and good governance is virtually silent on gender. Men's near monopoly of political decision making has been so long taken for granted that women's absence goes on hardly noticed.⁵ Gender must be embedded in the ways we conceptualize, define and measure good governance, for representation, responsiveness and accountability to its stakeholders, a balance of women and men alike.

In the sections below, I address the historical development of women and gender in integrating and mainstreaming terms. I ground these ideas in the knowledge accumulated thus far about institutional practices and movements towards mainstreaming. Considerable accomplishments have occurred in expanding public policy agendas and establishing connections to mainstream policy. Although the bodies of knowledge about women and gender have grown and become differentiated, there is a remarkable convergence of thought that builds an action momentum. Yet neither gender strategies nor visions have *transformed* institutional missions. Ultimately, institutional missions must change, for those missions set the stage for the institutional incentives and penalties that structure the opportunities, attitudes and behaviours of decision makers and staff, ranging from their chief executives through mid-level to street-level bureaucrats.⁶

An expanding policy agenda

In the 1970s, when research and action first began on women and development, public policies, UN meetings and textbook treatment on development were oblivious to women in production, reproduction and community. Since the International Year of Women (1975), the World Decade for Women (1976–85) and subsequent women's World Conferences, the range of public policies with gender stakes has expanded to include virtually all areas of society and economy, largely due to grassroots actions around the world. The line once drawn between the public and the sacred terrain of everyday private life has been crossed, thereby embracing the former 'non-decisions', in the mobilization

of bias that perpetuated hierarchical power relations, subordinating women (see Staudt, 1985).

The scope of issues now on the agenda is breathtaking. Consider the broad range of issues (i.e. the critical areas of concern) about which a coherent and consensus Platform for Action emerged at the Fourth World Conference on Women in Beijing. These critical areas of concern, found in the left-hand column of table 1, are central to the missions of key international and national institutions, listed in the right-hand column, with which civil organizational stakeholders interact.

This comprehensive list grapples with the *whole* mandate of governments and international organizations, though many issues cut across agency and ministerial lines. To respond to the mandate is to enhance good governance at international and national levels. Yet how many of the

Table 1 Issues and institutional responsibilities

Critical area of concern	Responsible institutions
Poverty reduction	Banks at all levels Economic and planning ministries World Trade Organization (WTO) United Nations Development Programme (UNDP), Commission on Human Rights (CHR), Bretton Woods institutions
Education and training	Banks at all levels Education, youth, employment ministries Teacher-training institutions United Nations Educational, Scientific and Cultural Organization (UNESCO)
Health	Banks at all levels Health ministries and sector institutions World Health Organization (WHO), United Nations Fund for Population Activities (UNFPA), United Nations Children's Fund (UNICEF)

Table 1 (*continued*)

Critical area of concern	Responsible institutions
Anti-violence against women	Justice and law ministries CHR, United Nations Development Fund for Women (UNIFEM)
Armed conflict; rape as war crime	Defence, foreign affairs ministries CHR
Economic growth/opportunity, anti-occupational segregation and work-family harmonization	Employment, justice, cultural ministries Banks at all levels UNDP, WTO, Food and Agriculture Organization, International Fund for Agricultural Development, International Labour Organization United Nations Industrial Development Organization
Women's equal participation in transparent and accountable government	Interior, justice ministries UNDP, CHR Public administration/personnel training
Institutional capability to integrate gender perspectives and data in policies, programmes and laws	Planning, education, and justice ministries UNDP Public administration/personnel training
Promotion and protection of women's human rights	Justice and law ministries CHR, UNIFEM
Balanced, not degraded images of women in the media	Cultural, communication ministries UNESCO
Environmental sustainability	Banks at all levels Environment, planning ministries United Nations Environment Programme, WHO, UNICEF
Enhancing the potential of girls	Education, health, justice ministries UNICEF, WHO Banks at all levels

standard operating procedures in these institutions are designed to draw on knowledge about people — women and men — in ways that respond to their needs and interests in ways that can be documented and accounted for? Are gender-aware dialogues in place in transparent budgetary decisions? In the drive towards people-centred development, these institutions must clarify how and what they actually do, spend and connect with the everyday lives of women and men. The Platform, however, is not fully known, used or linked to institutional missions.

If institutions are to act on the Platform, they must understand how people and institutions are *gendered*; that is, they must address, compare and assess their missions and programmes for burdens and benefits on women and men in the given asset and opportunity structures of unequal power relations. Such a task is easier said than done, for institutions and their missions share little in common save what sociologist Max Weber once referred to as the 'Iron Cage of Bureaucracy'. In that cage, we find vastly different institutional cultures, leaders and leadership styles, degrees of coordination, birthing periods, disciplinary specialization, missions, and staff demographics (gender and otherwise) — all protecting their autonomy to different degrees.

The Beijing Platform for Action is remarkable for the strength of the language and the ways it builds common ground among diverse groups of women and men, committed to gender equality. It has continued its long-standing emphasis on work and health, so important for the efficiency and instrumental rationales to which most institutions listened and responded, however meagrely. As an example, support for micro-enterprise programmes — *and* for the policy and legal changes that would make them effective to entrepreneurs whatever their gender — have taken hold in our state-downsized, market-oriented global context. NGOs such as the Grameen Bank have been celebrated, analysed and cloned in many parts of the world. At the 1997 Micro-enterprise Summit in Washington, DC, which many heads of state and NGOs attended, one might have got the impression that micro-enterprise has become a code word for women or gender-equality efforts. Yet fully transparent documentation of the key questions — who gets what, with what consequences (the outcomes) — shows the

overwhelming statistics: over nine out of ten investments are not only in men, but also in public rather than NGO conduits.⁷ The Beijing Platform for Action put political representation and institutional accountability on the agenda, the full piece of the picture in understanding the great lengths to which we must go in realizing gender equality on seemingly compatible programmes such as these.

The Platform also gave priority to issues once muted for their seemingly radical threat — such as human rights, violence and rape — to which institutions have begun to respond. As an example, women's rights *are* human rights and official 'war crimes' now include rape (Gallagher, 1997; Staudt, 1998). Even among the early Women in Development (WID) advocates, these priorities were once isolated among activists who viewed the state as suspect or of so-called 'rights-oriented liberals' who sought to strengthen rules of law that would take crimes against women seriously. Now these disparate groups not only come together on common ground, but also elevate their concern to the policy mainstream. It is important to take this strong consensus into the mainstream of institutions and governance. What analytical language best enables this transformation towards people-centred development: women or gender?

From women to gender (or both?)

In the 1970s, the term 'gender' was submerged in obscure and academic texts, relegated mainly to sociology and linguistics. But now it seems to be the term of preference, at least in the English-speaking world, for the term does not translate consistently well into other languages (Jahan, 1995). Why the transition? The shift had as much to do with the broader embrace of language as with the ambitions to move from the margins to the centre of institutional policies.

Conceptually, gender language has some advantages over the language of women, woman or female (and certainly sex, still given to chuckles, multiple meanings and the like). Gender emphasizes the *social construction* of people's identities, giving contextual and historical meaning to the biological (and therefore seemingly immutable) referents of male

and female, women and men, or sex. Public policies are about reconstructing society and economy, and are thereby linked to constructivist thinking. Gender is also more inclusive and relational, addressing women *and* men, along with the relations between them. It responds to that quip that early women advocates often heard: Why not men in development? (Those who made such quips rarely comprehended the depths to which men's interests had been institutionalized in policy practice.) Gender also had the advantage of defining problems and analysing alternative solutions in more far-reaching ways. The nineteenth-century 'woman problem' could in the late twentieth century be a 'man problem' as well, whether dealing with sexism, reproduction or the perpetrators rather than the victims of sexual violence (see Zalewski and Parpart, 1998). As examples, family planning and sexuality education aims to reach boys and men as the partners in reproduction and the potential perpetrators of attitudes which reduce women to one-dimensional sexual/reproductive beings. Programmes work with young men to reduce the aggression, superiority complexes and hostility that lead to battery and rape (see Staudt, 1998; www.unfpa.org).

Strategically, the term 'gender' also had advantages for turning what was disparaged as a political issue into a technical term with hoped-for due respect among the professionals and scientists who inhabit institutional life. Politically, WID advocates operated outside the institutions. They sought *entrée* but got stuck at the margins, housed in a women's office, at a women's desk and with pocket change in terms of overall budgets. The occupation of such limited space left gendered power structures intact, the holders of that power perhaps hoping to pacify the critics with a few resources. The outsider advocates, now on the inside, helped massage the policy rhetoric of their institutions, developing procedures of intent and effort, of which they compared and measured the progress. Some early work treated this as 'institutionalization', the language of public administration that transitions the innovative to the routine. Policy rhetoric and procedures of good intent (summarized as 'inputs') however, can never substitute for implementation, action, results and outcomes. The analyses of 'women's machinery', now part of virtually all national governments, offer

parallel conclusions (see Staudt, 1985; Kardam, 1990; Moser, 1993; Goetz, 1995; Jahan, 1995; UN, 1995; Razavi and Miller, 1995a).

One of the first conceptual distinctions among WID, Women and Development, and Gender and Development (GAD) emerged from Canada. As an example, the Canadian International Development Agency (CIDA), with support from its technical and research counterpart arm, was among the first bilateral agencies to develop what it called a 'corporate' strategy to gender and development. This strategy shifted responsibility from a single advocacy office to broad accountability, relying on staff training and personnel and evaluation. In its admirably thorough evaluation notes of the early 1990s, however, CIDA still lacked a thorough embedding of gender analysis throughout its corporate structure. So-called 'mandatory' gender training fell short of those implied universal goals; numerous contractors were never reached (a perennial problem with UN agencies as well). Besides, short-term training for a day or two can hardly undo or unlearn a lifetime of gender obliviousness. Yet other opportunities emerged to foster dialogue about and establish gender monitoring (and potential outcome) indicators through the reorganization of CIDA's Management Information System (MIS). With the crisis created by the year 2000, the MIS required re-engineering and thus the opportunity to incorporate gender in the results-oriented approach (Rathgeber, 1990; Razavi and Miller, 1995b; Rivington, 1997; Staudt, 1998).

Although many institutions have renamed projects by changing the word 'women' to 'gender', their actions do not uniformly demonstrate a corresponding shift in behaviour or gender equality outcomes. In fact, some confusion seems to prevail on the different meanings of the terms. Part of the confusion involves polarized interpretations among some who view the word 'gender' as an attempt to politicize, while others regard it as an attempt to depoliticize. Of course, any shifts in public spending and priorities ultimately involve politics and power, no matter what economists or sector specialists want to believe about this or their own work, including work that dismisses women or gender. Others see gender being used to divert attention to a new high-priority 'men at risk', as exemplified in Jamaica's

GAD-oriented Women's Affairs Bureau (see Goetz, 1995; Baden and Goetz, 1997). The translation of 'gender' in multiple languages is an issue mentioned earlier. Consequently, stakeholders on women and gender will likely see, read and experience the use of both terms for many years to come, including at world conferences and in future Platforms for Action.

From sideline to mainstream

At least a decade of separate WID offices produced noteworthy projects and principled thinking about rationales linked to integration. Like the 'masters' houses' in which women's offices operated, development was compartmentalized and fragmented into discrete, timetabled projects (see Staudt, 1998). But a larger shift was taking place from project approaches to programmes and grand policy approaches in the context of government downsizing and structural adjustment. So also did the locus of decision making shift within and between institutions.

The project approach rarely added up to anything approaching equality or any of the many ways those noble principles can be conceptualized and measured. Measured by numbers of projects or by funding allocated (for those rare institutions prepared or willing to make such accounts public), the efforts to include women resulted in paltry outcomes, usually single-digit proportions of institutional effort. Among the rare institutions to document double-digit efforts, or up to 20 per cent of funding to women, we find organizations with missions that departed from the orthodox mainstream (such as Scandinavian bilateral technical assistance agencies) and CIDA, already mentioned above for its institution-wide efforts (Jahan, 1995).

Overall missions and budgetary priorities *do* make a difference. The UNDP *HDR* consistently advocates '20-20' proposals, calling for international and national good governance commitments to 20 per cent human development funding (primary education, health and family planning care, and mass-supply water and sanitation). The range is from 10 per cent in the World Bank to 78 per cent in UNICEF,

and significantly below 20 per cent in many national governments (*HDR*, 1994). Good intentions or paper commitments are not enough. Some institutions made the clever but ultimately deceptive claim that the mention of women in design documents (an intent? rhetorical device?) was tantamount to integration. All too often, this sort of 'paper compliance' was what characterized WID at the sidelines.

By the 1985 Women's Conference in Nairobi, activists hungered for a strategy to spread and diffuse responsibility across institutional mandates down to the very core of institutional missions. Mainstreaming was born as a strategy, before accumulated experience on what did and did not work in mainstreaming could be analysed. From all historical and research accounts, gender lines permeate everyday life; public policies and programmes often perpetuate those lines or have disparate impacts on women and men because of the structure of social inequality. And women and men participate differently in what some forward-looking economists call the 'care economy': domestic or reproductive work and voluntary community work, 'vital in developing and maintaining the health and skills of the labour force; and in developing and maintaining the social framework' (Elson, 1996a: 8–9; see also Moser, 1996). Policies, then, have gendered effects, even if those who make and implement policy are blind to that way of understanding and measuring analysis. The shift to mainstreaming paralleled the shift from women to gender. But a decade of attempted mainstreaming prompted some to worry about the disappearance of gender in subsequent decades. In actuality, gender mainstreaming has hardly begun.

Thus began the era of gender training, defined as 'a way of looking at the world, a lens that brings into focus the roles, resources, and responsibilities of women and men within the system under analysis' (Rao, Stuart and Kelleher, 1991:7). Through gender training, it was hoped, staff would understand and link knowledge about gender to sound technical development practices. Such hopes do not materialize unless staff are grounded in a structure of expectations, recognition and rewards for a new kind of job performance. Institutions had not yet established serious evaluation systems that took gender perspectives into account for either their programmes or their personnel. Training was not coupled with recruitment

and replacement strategies in which selection criteria and job definitions included gender expertise and experience.

Several types of gender training approaches emerged (Kabeer, 1994; Razavi and Miller, 1995b). In the first, the Gender Roles Framework, trainees learned the division of labour, assets and returns for effective projects. In the second, the Triple Roles Framework, also associated with the Gender Planning approach, trainees learned about the productive, reproductive and community demands on women's time and labour burdens.⁸ In the Social Relations Framework, trainees learned the power relations between men and women in the context of other inequalities such as class and race. In moving from roles to planning and to relations, we also move the level of analysis from local project fields to the institutional level, whether national or international. This is obviously a move from the relatively simple to the complex. Gender relations analysis is especially complex because it insists on understanding diversity among women and men (see Mohanty, Russo and Torres, 1991). It attends to gender inequality as well as attending to income inequality or poverty and does not assume all women are alike.

These three approaches give more or less attention to the power relations of institutions and the contexts in which they operate (table 2). Gender Roles approaches have no institutional agenda, outside of more enlightened staff. Gender Planning seeks to infuse institutional operations and procedures with gender perspectives. Social Relations attends to diagnosing institutions in all their comparative complexity. Such diagnoses are far more complex than the earliest WID strategies which prescribed common ingredients, most of them in the area of procedural intent,

Table 2 Approaches to gender training

Approach	Level of action	Effect on governance
Gender Roles	Local project field	None intended
Triple Roles	Programme, policy, budget	Institutional
Social Relations	All	Institutions in society

about the existence of policy, checklists, guidelines, sex-disaggregated data bases, and so on.

The Organization for Economic Cooperation and Development's (OECD's) Development Assistance Committee's (DAC's) WID Committee developed increasingly complex reporting tools about its bilateral institutional membership's commitment to integration. The very existence of what came to be thirty-nine practices in four categories gave institutions not only legitimized ideas but the leverage that visible reports can provide to stimulate change (OECD, 1992).

The OECD/DAC/WID's position as a clearinghouse provides a loosely centralized network. But, by institutional definition, it has stopped short of establishing rules and outcomes for its sovereign member states. While UN family institutions are not in comparable circumstances, some of those institutions have the explicit mission to respond to sovereign state agendas, such as the UNDP. While many states are on official record for ratification of the Convention on the Elimination of All Forms of Discrimination against Women, or in support of various outcomes of women's conferences, their governance relations vary markedly, from those wherein men monopolize political power with a narrow policy agenda to those making a transition towards gender-balanced democracies with women-friendly policy agendas.

Mainstreaming: transforming institutional missions?

Both official organizations and NGOs took up the banner for mainstreaming. One of the first comprehensive analyses to reform mainstream development visions came from the Southern-based DAWN, the Development Alternatives with Women for a New Era. The vision is ambitiously breathtaking, but one to which few institutions subscribed, both then and now. Consider DAWN's summary:

We want a world where inequality based on class, gender, and race is absent from every country, and from the relationships among countries . . . where basic needs become basic rights and where poverty and all forms of violence are eliminated . . . where massive resources now used in the production of the means of destruction will be diverted to areas where they will help to

relieve oppression both inside and outside the home . . . where all institutions are open to participatory democratic processes, where women share in determining priorities and making decisions. (Quoted in Sen and Grown, 1987:80–1)

The first institution to put thought into mainstreaming was UNIFEM. While it worked with women and gender units on their expertise, it sought to strengthen those units with funding leverage to spread commitment and responsibility to the other parts of government (Anderson, 1993).

During the 1980s, several analyses emerged which categorized the rationales and principles on which women and gender action were based: welfare, efficiency or effectiveness, poverty reduction, equality and justice, and empowerment. They were, and are, used, misused and criticized in confused ways. Gender mainstreaming will not produce consensus on one rationale. Bankers and economists, engrained in a market model, are not likely to respond to terms such as 'empowerment'. However, conceptual spaces in their model open to 'human capital investments' in education and health (Bangura, 1997:21).

The mid 1990s saw several pathbreaking analyses of institutional mainstreaming. One, deriving from a slogan to get prices right, focuses on 'getting institutions right', whether governmental or non-governmental. The mainstreaming, or 'gender-sensitive institutional change', effort is 'to routinize gender-equitable forms of social interaction and to challenge the legitimacy of forms of social organization which discriminate against women' (Goetz, 1997:5–6). Another compares two multilateral and two bilateral institutions, with practices traced to outcomes in two nation-state settings. The work is set within a framework of two kinds of mainstreaming, one that *integrates* existing institutional missions and the other, agenda-setting type, that *transforms* institutional missions (Jahan, 1995). Such analysis allows us to make a bridge to institutional mission and alternative development models. In the 'triumph of capitalism', or the late 1980s transition to market economies, one leading economist warns of the flaws and distortions that easily emerge in such triumph: the collusion of economic and political elites and growing inequalities (Heilbroner, 1989). Without saying as much, these warnings are calls for good governance: to open public space and

spread voice beyond elites; to construct people-friendly policies that distribute assets, incomes and opportunities among people in more equitable ways.

Elsewhere, the attention is paid to alternative models and decision-making processes 'on the allocation of values that is likely to result in new policies or modification of existing ones', called 'policy dialogues' (Bangura, 1997:8–17). Three are relevant, listed from the most to least hegemonic:

- *Technocracy, especially the neo-liberal economic model*, which vests authority in government technocrats and international finance experts who reduce deficits and inflation, open markets, and promote competition and efficiency.
- *Corporatism*, the 'historic class compromise' which manages national conflict through bringing organized interests into policy making.
- *Global sustainable pluralism*, inspired by UNDP HDR thinking about development as equitable, gender balanced, participatory, sustainable and respectful of diversity.

Women fare least well in the simplistically elegant model of neo-liberal economics; better under corporatism (particularly in Europe, in contrast to Latin America); and between the two in the open and eclectic global sustainable model. Corporatism thus far has been viewed with national boundaries, rather than at global levels, except for some rare exceptions such as the International Labour Organization with its tripartite stakeholders, none of which prioritize gender.

With a solid analytical base along with the strong language of the Beijing Women's Conference, the UN family has formulated a clear foundation for gender mainstreaming. Note the frequent use of the word 'all' in this language, as well as the shift to 'policies'. The clear message herein is that institutions should no longer relegate gender equality strategies to the isolated margins of separate projects, disconnected from the institutional mandates and all the bureaucratic divisions:

We hereby adopt and commit ourselves as Governments to implement the following Platform for Action, ensuring that a gender perspective is reflected in all our policies and programmes. (*Beijing Declaration, para. 38*)

[We call upon] States, the United Nations system and all other actors to implement the Platform for Action, in particular by

promoting an active and visible policy of mainstreaming a gender perspective at all levels, including the design, monitoring and evaluation of all policies, as appropriate, in order to ensure effective implementation of the Platform (*General Assembly, on follow-up to the Fourth World Conference on Women, Res. 50/203*)

[We define mainstreaming a gender perspective] as the process of assessing the implications for women and men of any planned action including legislation, policies, and programmes, in any area and at all levels. It is a strategy for making women's as well as men's concerns and experiences an integral dimension in the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres so that women and men benefit equally and inequality is not perpetuated. (*ECOSOC Agreed Conclusions 1997/2*)

Moreover, the UN now has multiple strategically placed people and committee stakeholders in place for coordination and oversight, among them the Division for the Advancement of Women, an Assistant Secretary-General for Gender Issues and the Advancement of Women, an Inter-Agency Committee on Women and Gender Equality, the International Research and Training Institute for the Advancement of Women, and the United Nations Development Fund for Women. Human Rights oversight embraces theoretical mandates that are broader than single-sector institutions or multiple-sector technical assistance agencies such as the UNDP. Still necessary, however, are basic tools for use in evaluating outcomes and deconstructing budgetary cores of institutions with good governance, including gender-balanced governance. One by one, institutions are in transition towards mainstreaming.

A gender mainstreaming policy requires that various staff — from top to bottom and in all divisions — be aware of and/or trained in awareness of how each policy and operational decision will benefit and burden different groups of women and men. No action is free of gender implications, for in all societies the structure of gender relations creates different opportunities, experience and benefits.

Gender mainstreaming begins a process of understanding the baseline of institutional capabilities, measurements and actions with respect to consequences of inequality in different degrees. The track record will initially appear faulty, but it will be a tribute to those well-governed institutions

to be open, transparent and honest about documented performance. The highlights which follow illustrate how top-level administrative commitment, backed up with resources and measurable goals, can alter the incentives that support gender equality within large institutions, even those that are decentralized in complicated ways. For example, a 1996 memorandum from the UNDP Administrator reports that 6.7 per cent of resource allocations in 1994/5 were in the category of advancement of women, compared with 20 per cent each in the categories of poverty, the environment and governance. An internal report of 417 projects, cited in this memorandum, observes that 'gender was superficially added to the project background to pass the screening process, but rarely integrated into the operating assumptions of the development sectors'.

From this analysis, the UNDP Administrator took steps to enforce commitment, steps with numerical funding objectives and reporting requirements, all of which necessitate ongoing monitoring. For example, a 10 per cent commitment from global programme resources was allocated to gender mainstreaming, to which allocations from other thematic areas (especially poverty) would be added, totalling 20 per cent. In that global programme, resources support gender mainstreaming tools and models as well as partnerships that include women in decision making. Additionally, 20 per cent of regional programme and 20 per cent of country allocations are designated for 'the advancement of women'. This comes from that same 1996 memorandum from the UNDP Administrator.

Gender mainstreaming framework

After imbibing the historical and contemporary considerations above, we are now in a position to establish a basic framework for gender mainstreaming. The task is a daunting one, given the need to respect the integrity, complexity and diverse missions of institutions at global, country and within-country levels. But it is a task long overdue, for the Beijing Platform for Action speaks loudly, clearly and in consensus about the goal of gender equality.

The framework would begin with institutional *outcomes* rather than inputs and promises. These outcomes must be people oriented, surely a common ground that even the most orthodox of economists would acknowledge. When the promotional literature of the largest international bank says it ‘makes a difference in people’s lives’, the outcomes oriented among us would hope that the difference is positive, that it reduces gender and income inequalities, and that it can be documented. The language of gender provides analysts with the most socially significant categories of people, next to nationality, about whom policy actions are significant: women and men.

The framework would operate at the macro level of *policy dialogue*. As such, the framework recognizes the competing dialogues that operate in global and national society and occasionally within institutions themselves. Policy dialogue can be as grandiose as a hegemonic orthodox economic model (wherein counter-hegemonic forces frequently operate), to institutional mission, to sector objectives. Within the context of this policy dialogue, the framework asks the Chief Executive Officer and major stakeholders to establish answers to two basic questions:

- What, in documentable people outcomes, does it mean for our institution to pursue its work?
- What, in documentable people outcomes, does it mean for our institution to pursue that work in gender-sensitive ways?

To answer the second question, those involved in the dialogue must also ask about policies and programmes:

- What policies and practices institutionalize preference to men?
- What policies and practices would de-institutionalize such preferences?
- What new policies or compensatory practices would equalize future policies?
- What assumptions are made about the (aforementioned) ‘care economy’, and how do those assumptions distort traditional ways to measure efficiency and cost–benefit calculations?

Once outcomes are established, the central operating mission unit wherein planning and budgetary approval are housed should establish funds along with data, monitoring

and operating procedures to move towards those outcomes. Those significant commitments now become the 'inputs' rather than promises to put the word 'women' in design documents, checklists or the women-impact statements of years past. Of course, those minimalist, but bureaucratically cumbersome, techniques could reorient staff. At the bottom line, though, staff selection, orientation and training programmes, followed up with personnel evaluation and rewards, would recognize gender-sensitive work as central to institutional missions. Each significant division, bureau and department should have a critical mass of focal points with gender expertise and experience to make gender-sensitive outcomes happen. Critical mass is taken here to mean more than one or two and, within larger units, at least 20 per cent representation of women.

In most institutions, the dialogue, as well as the institutional machinery to operationalize people- and gender-sensitive outcomes, will require *new* staff with gender expertise and experience to replace those who leave under attrition and retirement. Selection criteria for new staff should contain gender expertise and experience along with the other factors. Such criteria will shift some of the mainstreaming burden to educational institutions, public administration institutes and the schools that educate faculty and teachers for all levels of schooling. Gender analysis should occupy as critical a place in curricula as other forms of social analysis.

Gender expertise is linked to technical capabilities, political and diplomatic skills, and sector-specific expertise. In the words of those who analyse women's policy machinery in Australia, Canada and New Zealand, 'bilingualism' is required in both the dominant and gender discourses, coupled with connections to outside constituencies, which themselves understand the institutional structures, pressure points in budget cycles and procedural issues (Sawer, 1996:23). Typically, small groups of officials deal with budget policy. Those in dialogue need to be a broader group than the few who generally meet 'behind closed doors'. This group would include spending ministries, women's and other groups in the general public, and researchers and policy (including gender) analysts, who will increase the *demand* for integrating gender into budget policy — a sure counter

to the small *supply* in that policy. 'Budget hearings' with women parliamentarians and NGOs are another means (Elson, 1996b:16).

Precedents have been set for viewing the budget as a mechanism to facilitate outcomes. Among these examples we would identify South Africa, Australia and Canada. The framework for Australia is quite complete, as a pictorial outline illustrates (Elson, 1996b:10; Figure 1).

Commonwealth ministers responsible for women's affairs heard and discussed these approaches in the context of moving from 'gender blind' (also known as 'gender neutral') to 'gender-sensitive budgets'. Of particular interest is the effort of budget analysts to understand the 'care economy', guided by neither commercial nor altruistic principles. In this economy, wherein women especially pursue socially valuable tasks, what might appear to be cost-saving measures in downsizing the state may have significant burdens on women, who assume responsibility for some of those tasks. At some point, even women cannot bear extra burdens and the tasks go undone, at a major cost then to the whole society. Downsizers cannot assume that women's time and labour are 'available in unlimited quantities . . . perfectly elastic' (Elson, 1996a:10). The calculation of costs and benefits in the care economy is part of the toolkit of gender-aware outcome and budget analysis.

With disparate national and international institutions developing institution-specific outcomes and budgets, we

Figure 1 Australian women's budget: outline

Total budget equals:

By department:

Specific gender-based expenditures, i.e. in employment and health

+

Equal employment opportunity expenditures on employees

=

Budget, minus above two expenditure types, for gender impact:

Who uses?

Who receives?

still need global summary outcomes reported with honesty, integrity and technical competence. For its track record of attention to people-centred outcomes, as well as its gender-sensitive staff, the UNDP *HDR* office seems a logical choice. However, *HDR* should pursue data and outcome measures that go beyond the current indexes (GDI and GEM). Gendered decision making counts are in part outcome but in part assumptions about the means (inputs) towards equitable outcomes. Global citizens need *gendered* summary outcomes about poverty reduction, assets and incomes, and good governance.

This gender mainstreaming framework is ultimately a framework about good governance. Those who conceptualize and support good governance need also to go to their central drawing boards to consider outcome, meaning and strategy in gender-equal terms. Outside the rhetorical and pronoun approach (women and men, he and she), governance documents do little to clarify what the demopolitization of male politics will mean for governance outcomes and procedures.⁹

Obstacles to gender mainstreaming

The obstacles to an ambitious gender mainstreaming strategy are both contextual and conceptual. In part, these are obstacles associated with transforming institutional missions and policy dialogues with gender tools that attend to the very heart of development as capacitating human beings: budgets and evaluation outcomes.

Gender analysts confront the first huge challenge of movement towards 'good governance'. Good governance is about many things, ranging from opening democratic spaces to performing governance tasks well, justly and equitably. Thus budget and evaluation matters are at the heart of these concerns. Heretofore, budgetary processes have been less transparent than they would have been had notions of good governance been a standard. Evaluation offices have been rendered impotent in institutions that relish the opportunity to promote the 'good news' about their work but avoid accountability for the 'bad news'. Even evaluation units have

avoided conceptualizing their work in ways that document outcomes for people, meaning both women and men. Instead, evaluators have attended to the concerns of funders rather than determining how effectively that money is spent in improving human capabilities. Fortunately for gender analysts, good governance has begun to preoccupy many within both national and international institutions. Once those associated with good governance comprehend the centrality of gender equality to the tasks at hand, their stakes in this work will deepen.

A second obstacle to gender mainstreaming results from a context of limited resources and of downsized institutions (see Kwesiga, chapter 10 in this volume). Whatever the gender unit and wherever it is located, analysts and focal points could use what in public administration literature was once termed 'slack resources', or flexible monies to leverage change. Moreover, it takes resources to recruit new staff and to reorient existing staff towards gender-aware analysis in outcome and budgetary tasks. As the analysis of 'femocrats' (versus 'ecorats', or economic rationalists) in Australia, Canada and New Zealand warns about operating within downsized government, actions are sometimes limited to preventing further damage to women (Sawer, chapter 12 of this volume and 1996).

Yet if institutions are to take their gender mainstreaming seriously, other institutional resources will be freed up for equality outcomes. Such funding 'liberation', however, always involves struggle for those who lose, or who perceive loss. And the loss may be more than budgetary privilege and preferential spending to men. The movement towards gender equality is a movement away from arbitrary male control and authority. Yet will downsizing and economic downturn, affecting men and women alike, lead resentful men to resist equality and their loss of control rather than resist political-economic decisions that burden people? Under such circumstances, good governance needs to ensure safety against domestic violence, rape and other backlash hate crimes.

A third obstacle to gender mainstreaming is found within the hegemonic neo-liberal, orthodox economic model — one that pays no heed to the care economy. Yet as outlined earlier in this paper, multiple models exist along with space therein for gender analysis. As institutions and people move

and shift to new models, however long that process, analysts should be eclectic and open to opportunities to stretch and/or critique existing models within spaces that exist for policy dialogue. Even the orthodox, or the ecorats, understand the importance of what they term 'human capital investments'. The challenge here is to ensure that investments are adequate, approaching or exceeding the 20–20 human development funding goals that were cited earlier.

Besides the larger, contextual obstacles outlined above, gender mainstreaming also confronts several conceptual challenges. One involves the way we conceive of households and the winners and losers therein. At one time, simplistic analyses assumed that householders shared income and benefits. Economic rationalists continue to use such simplified assumptions for elegant model making and computation. WID analysts brought the 'female-headed household' on to the analytical platter, as well as household diversity on the degrees to which incomes are separate or shared. Households are complex units which, according to one conception, are places of 'cooperative conflict' (Sen, 1990).¹⁰ This sort of complexity is a large obstacle to interpreting gender-aware budgets. The second conceptual obstacle is associated with assessing gender equality outcomes in global, quantitative, qualitative and contextual ways. Numbers, and our obsessions with them, are tools to begin gender-aware dialogue, rather than to close those matters.

Fundamentally, gender mainstreaming is at the very core of public and democratic efforts in development. For this reason, it seems fitting to close with the troubling, yet eloquent words of the UNDP *HDR* in its call for gender-sensitive conceptions and outcomes: 'Human development, if not engendered, is endangered' (1995:1). Such a grave threat cannot be addressed with a single 'machine' within a nation or institution. Gender mainstreaming must permeate governance rather than rely on a piece of machinery.

Notes

- 1 This definition draws on the work of the UNDP's *Human Development Report*, issued annually and published by Oxford University Press

- in New York, hereinafter referred to as *HDR*, with the appropriate year.
- 2 *HDR* 1997 was focused on poverty. The billion-person figure is based on both income and human development criteria.
 - 3 The Gender Disaggregated Index (GDI) and Gender Empowerment Measure (GEM), pioneered in the 1995+ *HDRs*, are composite scores. As *HDRs* routinely say, 'no society treats its women as well as its men'. The word 'equality' (the same share for everybody), which seems fixed, absolute and simple in its implications, as Deborah Stone (1997, chapter 2) discusses, is complex in the polis: same shares among those with interest or need, or all? Same share based on the value of the good? Same share based on equal competition, or compensation for past burdens? Same statistical chance in share allocation? Same share based on opportunity to participate politically? And on and on . . .
 - 4 Entitlement and endowment come from Amartya Sen's work on poverty (see, for example, Sen, 1990), which in turn feeds into *HDR* thinking. Yet Sen's focus on assets such as land do not show up in *HDR* methodologies. *HDR's* Capability Poverty, or more recently (1997) Human Poverty Index, composites could use gender disaggregation.
 - 5 The rich and elaborate UNDP website for Good Governance contains little conceptualization which embeds gender (www.undp.org). The World Bank's concern with governance is largely related to stable, legal contractual systems for market exchange. The Freedom House, which produces an annual Map of Freedom showing the global shift to majority free and partially free countries (www.freedomhouse.org), is gender neutral, or to use Diane Elson's term for the budget, 'gender-blind' (see, for example, Elson, 1996a, b). Its eight-item political rights checklist asks whether 'cultural, ethnic, religious and other minority groups' have participation, but says nothing about gender. It asks about freedom from 'economic oligarchy' but seems oblivious to male oligarchy. But see *HDR* 1995, focusing on gender and highlighting 'men's monopolization' of politics.
 - 6 Much institutional analysis, whether gendered or not, focuses on inducements or structures of rewards and penalties that affect staff from top to bottom. Street-level refers to those front-line staff who interact with the public.
 - 7 The Summit is analysed in Staudt, 1998, chapter 5, with a table from the conference directory showing the overwhelming responses from NGOs that serve majority women. Yet literature from South Asia, also reviewed therein, shows 'pipelining' loans through women to their husbands (which surely expands stakeholders and supporters, but confuses the understanding of evaluation outcomes). In Bangladesh, the renowned Grameen Bank issues a minuscule proportion of credit in the country context, even though its participants now number two million. *HDR(s)* have reported that micro-enterprise credit still goes to a 95 per cent male majority; the 1997 *HDR* says that less than 1 per cent of credit reaches the poorest billion (*HDR*, 1997:109). The 1993 *HDR* says that the Grameen Bank accounts for 0.1 per cent of national credit in Bangladesh (*HDR*, 1993:6–7).
 - 8 Gender Roles has also been associated with the 'Harvard' model, while Kabeer is wedded to Gender Relations. Moser's foundational work is Triple Roles, and these ideas have given birth to the care economy considerations in Elson's conceptualization of gendered budgets.

- 9 The UNDP web site is beautifully complete, save conceptualizations and references on gender. Yet the definition of good governance is potentially inclusive: participatory, transparent and accountable... effective and equitable... rule of law... wherein the 'voices of the poorest and the most vulnerable are heard in decision-making over the allocation of development resources'.
- 10 Razavi and Miller (drawing on Buvinic) point out (1995a) that an emphasis on female heads is 'less threatening to male bureaucrats' and that it 'does not raise intra-household redistributive questions' Razavi and Miller:7. See also Baden and Goetz (1997) on credible sources.