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Gender Inequality and Poverty: Trends, Linkage, Analysis and Policy Implications

Part II

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Part II

Gender, poverty and humanitarian assistance

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6. GENDER, POVERTY AND HUMANITARIAN ASSISTANCE[1]

6. 1 Integrating Relief and Development

Current concerns about linking relief and development arise from two sources. First, they are motivated by the recognition that relief activities which are decontextualised from development processes can be counterproductive to development, particularly by undermining the organisational capacity of the affected area (Ross et al, 1994; Buchanan-Smith, 1990; Anderson and Woodrow, 1989; Swift, 1989). Second, they are motivated by the tendency for emergencies to absorb a growing share of aid budgets (UNICEF, 1992; Walker, 1994; Ross et al, 1994). In the context of 'escalating crisis' (UNICEF, 1992), and 'permanent emergencies' (Ross et al 1994), relief often the precursor of development work. Similarly, evidence of decreasing resilience to crisis, particularly in parts of Africa, has highlighted the need for relief activities which address the causes of susceptibility to disasters, as well as their immediate effects.

Integrating development and relief responses involves supporting coping capacity, and strengthening the potential for recovery. It has been suggested that gender analysis is an essential tool for understanding the relief-development continuum (Anderson, 1994). [2]

A gender analysis of vulnerability can clarify the links between vulnerability to disasters and poverty, which although closely associated, are not synonymous. Such a framework can be derived from an extension of Sen's entitlement approach, originally used to explain the differential impact of famines. However, the extended approach could apply to a variety of crisis situations, including war/ethnic conflict, drought, floods, refugee situations, as well as famine.

6.2 Vulnerability and poverty

The concept of **vulnerability** to disaster has been widely used in the literature to capture the idea that disasters, whether catalysed by natural events or not, are social phenomena, and that their impact depends on the social organisation of the affected area (Drèze and Sen, 1989). Disasters affect people in different ways and there is a strong case for gender analysis of their impact. An event, or series of events, can be interpreted as a disaster by one group of people, and not by others. There may also be beneficiaries of disasters (Sen, 1983; Keen, 1994), particularly long-run or slow onset emergencies such as famine, or explicitly political emergencies such as war.

The concept of vulnerability aims to capture the elements of defencelessness of some groups of people - their lack of means to cope without damaging loss (Chambers, 1989).

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[1] This section was written by Kirsty Milward, Research Assistant, IDS.

[2] It is worth noting that where 'rehabilitation' - often the objective of relief policy - implies 'getting back to normal', it may be an inappropriate crisis response (Buchanan-Smith and Maxwell, 1994). What was 'normal' may well have led to a particular event being experienced as a disaster. Returning to that situation may contribute to future disasters by failing to address structural vulnerability (Anderson and Woodrow, 1989).

Analysis of vulnerability can identify the long-term factors which affect a community or group of people, influencing their ability to respond to crises (Anderson and Woodrow, 1989).

Vulnerability is not always exactly correlated with income poverty. Poverty can be alleviated by the provision of credit, for example, but this increases vulnerability (Chambers, 1989). Asset holding does not necessarily protect against vulnerability: the subsistence guarantees of poor people - access to land, or patronage resources, for example - often serve better to mitigate disaster than, for example, a herd of cattle (cf. Swift, 1989). Different dimensions of poverty need to be separated out in order to understand vulnerability more fully.

Nevertheless, there are close associations between vulnerability and (income) poverty, as is clear from the differential impact of natural events: poor people often live in less stable houses, or on marginal land in unstable places. (Winchester, 1992). In general, **poor people have less resources to help them withstand a disaster**. This association is clear from the high levels of death and injury from disasters in low-income nations (cf. Anderson, 1993 draft).

6.3 Gender and vulnerability

The classification of women as a 'vulnerable group' in many relief programmes is problematic for two reasons. First, the classification fails to differentiate between different groups of women - some of whom are more vulnerable than others, depending on a variety of social relations including class, caste, ethnicity and age. Second, it also tends to divert attention from understanding the causes of gender-specific forms of vulnerability in a given context, and hence to hamper relief efforts which intend to address vulnerability.

Analysis of the gender dimensions of vulnerability can clarify the differences among women as well as between women and men, and highlight the relations of gender underlying certain types of vulnerability.[3] People's **exposure to risk**, their **coping capacity**, and their **ability to recover** are all gendered:

Exposure to risk can be influenced by:

- existing nutritional levels: To someone who is already malnourished, a sequence of events may reach 'emergency levels' sooner than would otherwise be the case. Nutritional levels are sometimes lower for female than male children, and for

[3]Sen's exchange entitlements approach helps to clarify both the linkages and the differences between poverty and vulnerability and can be extended to provide a framework for examining the gender dimensions of vulnerability. Briefly, entitlements are allocated according to gender, via endowments in property rights, inheritance laws, dowry and bridewealth practices, education levels, and 'perceived contribution' to the household (Sen, 1990) which regulates, for instance, investment in health care. The 'rights' or 'empowerments' which can mobilise entitlements are organised through intra-household relations, as well as state/civil society relations. They influence the perceived status of male and female children, the intra-household distribution of food and health care, mobility, perceived appropriate behaviour, access to state resources, and local and national decision making apparatus.

pregnant women (cf. Vaughan, 1985), although this is highly sensitive to context (Harriss, 1990);

- restricted mobility may limit women's ability to relocate to avoid sudden onset disasters. The difficulty of, and disinclination for, temporary relocation, is strongly influenced in some contexts by women's responsibility for protecting their children, and their family's property (Begum, 1993; Winchester, 1992);

- practices associated with appropriate female behaviour partially explain women's higher comparative female mortality in the Indian earthquake of 1993. While men often sleep outside their houses, women always sleep indoors (Maybin, 1994).

Women's **capacity to cope** with emergencies is influenced by their existing **entitlements** (defined by endowments of stores, claims, and investments[4]):

- Women's personal assets are often limited to a dowry;

- The value of women's labour is affected by differential wage rates for men and women, and, in cases where members of the household have migrated for work, the reliability of remittances;

- Existing 'investment' endowments are also often limited by discriminatory practices concerning women's access to health care (Sen, 1987; Drèze and Sen, 1989). In an emergency situation, poor health status may affect women's ability to manage the extra workload associated with water collection during drought (Trivedi 1988), or the need to diversify income sources through extra paid work. Low investment in female education may also affect the possibility of diversifying incomes with alternative forms of work;

- Entitlements available to women are often marriage-based, making them particularly vulnerable in situations of marital breakdown caused by stress (Vaughan, 1985; Kabeer, 1991). Other sources of 'claims' e.g. help from the community, may also depend on marital status.

The effectiveness of all of these entitlements as coping strategies for women depends on women's **empowerment** to mobilise them. A number of factors, including patrilocal marriage practices (restricting access to extra-familial support); loss of sources of income and inheritance legislation and practice (limiting the assets controlled by women) limit the extent to which entitlements can be mobilised.

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[4]Extending Sen's approach (see footnote 43), Swift (1989) disaggregates endowments into investments, stores and claims, which have different uses in crisis situations. **Investments** include not only individual productive assets such as farm equipment, housing, trees, land etc., but also collective assets like irrigation systems and common property resources, as well as 'human resource' investments such as health and education. **Stores** include non-productive assets: money, jewellery, food stores etc. **Claims** are potential assets to be drawn on in specific circumstances - on other households for production resources, food, or labour; claims on patrons, on the government, or on the international community (ibid.).

Women's **recovery potential** is affected by many of the same factors that affect their coping capacity. Outcomes of specific coping strategies may further reduce their potential for recovery to pre-crisis levels, even after the worst period of crisis is over:

- The **order of assets sales** may be particularly significant where a woman's dowry, jewellery, or other non-productive assets are sold first, as is often the case (Kabeer, 1991) - especially where the crisis also leads to marital breakdown - given that marriage is the source of many entitlements for women;

- Where the emergency has negatively affected **women's position in the household**, e.g. by undermining her sources of income and thus her status, this will affect the possibility for recovery;

- For women whose marriages have broken down the **status of women outside marriage** is very significant for their possibility for recovery;

- The availability of **agricultural extension** technology appropriate to women's farming in different contexts (cf. Price Gittinger, 1990) may influence recovery;

- Recovery of food-production levels can be limited, for example, by women's lesser **command over scarce labour resources** - as in the Gambia (Kabeer and Aziz, 1990);

- Finally, women's recovery potential will be affected by the ability of **political and legal structures** to identify and respond to 'women's interests'.

6.4 Specific cases of gendered vulnerability

War and ethnic conflict

Conflict seriously disrupts entitlements, not only through asset-destruction (property, crops), but also by destroying mechanisms for exchange, reciprocity, or claims endowments (Apina, workshop presentation). Where, as in parts of Africa, rural women are responsible for the food-production needs of the family, the looting of crops will negatively affect food security. Conflict usually restructures labour opportunities, and can increase women's economic roles where men are involved in fighting. The heads of these de facto female-headed households are constrained in fulfilling these economic roles by restricted land rights, limited access to inputs and community access to decision-making (el Bushra, workshop presentation).

Marriage-based entitlements become particularly insecure in situations of family dismemberment common to war (El Hadi El Nagar, 1993). As recent experiences have shown, violence against women often escalates in conflict situations, in ways which require more attention and understanding. Violence against women, and particularly sexual harassment, abuse and rape, is sometimes used for the specific purpose of undermining community bonds, or to weaken resistance to aggression (Swiss and Giller, 1993). While it is not at all clear how this aspect of gendered vulnerability intersects

with poverty, it needs to be addressed, especially when rape / abuse carries such a strong stigma that it entails rejection from the family and subsequent impoverishment of the woman victim.

Refugees and displaced persons

Although a large proportion - perhaps even the majority - of refugees are women, long-term refugee projects still tend to be directed at men (WFP, 1992; DeVoe, 1993). Refugee women are often categorised as a 'vulnerable group', without a full analysis of the meaning and implications of gendered vulnerability. As a result, interventions aimed at refugee women have tended to be welfarist in approach, with a focus on small-scale income-generating projects (Forbes Martin and Mends-Cole, 1992).

Many of the above-mentioned gendered vulnerabilities are relevant to refugee populations. Especially significant here is **women's ability to be visible to and make effective claims on the international community**. Similarly, limited opportunities for women to participate in decision-making in refugee communities and influence their organisation affect their subsequent positions. There is a need, therefore, to involve women in planning and camp design, to overcome this tendency to marginalise women.

The breakdown of social, including family, structures, in refugee situations holds potential for challenging and improving on pre-existing gender inequalities (WFP, 1992). However, in practice, the implementation of assistance and refugee settlement programmes often takes the form of a reassertion of patriarchal control or cultural conservatism.

The issues of bereavement, loss and trauma, as well as their psycho-social consequences are rarely directly addressed by settlement programmes, despite an acute need for therapeutic input (Hensman, 1992). There are gender-specific aspects of these conditions - particularly related to rape and sexual violence. These are an increasingly documented aspect of war, and they are also a common phenomenon even inside refugee camps (Musse, 1994).

Famine and feeding programmes

In famine situations, **existing nutritional levels** will be particularly significant to the risk of exposure and coping capacity. Reducing consumption is a commonly used early survival strategy, often occurring before, for example, asset sale (De Waal, 1989; Swift, 1989). Whether or not it is a viable survival strategy will depend on pre-crisis nutrition levels and health status. Gender differentials in nutritional status may mean that girls and pregnant women have limited capacity to withstand decreased consumption.

By extension, **mortality rates** in food crisis situations may also vary by gender, although this contentious issue has been hard to assess.[5]

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[5] Data from the Indian census of 1911 (after the widespread and devastating 1899-1901 famine, and the Gujurat famine of 1907) has been interpreted as showing that women's excess mortality during famine is comparatively less than men's (Rivers, 1982; Drèze and Sen, 1989). Studies of later famines

Where acute food insecurity makes **migration** necessary, either in search of work or help, gender-specific difficulties arise. Male migration very often leaves women as de facto heads of household, with all the associated problems of female headship. Where women also migrate, responsibility for children may greatly increase the complexity of this task, as may restricted familiarity with, or acceptability in, public spaces.

Access to **common property resources** (CPRs) may be particularly significant for women in situations of food insecurity or famine, especially for single women, since these are often the only productive resources accessible to women without male mediation (Agarwal, 1990; Kabeer, 1990). The collection of 'famine foods' from CPRs may be a vital strategy, for which women are often responsible (Vaughan, 1985). Continuation or intensification of firewood collection or small livestock grazing may also be necessary.

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have come up with conflicting assessments (Harriss, 1990). However, there are many problems associated with measuring excess mortality - for example, for famine, is starvation the only criteria for an 'excess' famine death? What counts as a starvation death? Is the reporting of deaths male-biased? Assessments of excess mortality by sex also need to take account of the fact that, since women are apparently intrinsically (i.e. biologically) nutritionally more resilient, where excess mortality is similar for both sexes, this would still imply some discrimination in food distribution (Rivers, 1982).

Gender, governance and poverty

By Sally Baden

7. GENDER, POVERTY AND GOVERNANCE

7.1 Overview

The connections between gender, poverty and governance issues have received almost no attention in the literature to date, at least in an explicit form. This is, in part, because of the relative newness of governance concerns in development and because of confusion in the governance agenda, which incorporates a varying range of issues, depending on the perspective.[6] It may also be due to a tradition of separation in political science between feminist and mainstream political thinking. Connections are beginning to be made between gender and governance issues (e.g. Ashworth, 1995; Lovenduski et al, 1994), although not explicitly examining questions of poverty; there are indirect links over questions of resource allocation and public policy.

Lovenduski et al (1994) identify three types of gender bias in urban governance: **nominal** bias (i.e. there are more men than women in civil service; or women are under-represented at senior levels); **substantive** bias (i.e. issues of importance to women are marginalised; or women are marginalised from mainstream decision-making); and **organisational** bias (i.e. the structures and cultures of organisations exclude or fail to promote women or devalue culturally prescribed feminine norms). Such a perspective has clear relevance to changes in the organisation of government and public administration in development and should be brought into discussions of these areas.

There are narrow and broad perspectives on governance: the former concerning itself largely with public sector management and civil service reform; and the latter with a broader range of issues, including concerns with democratisation, human rights, legal systems and popular participation. (Anne Marie Goetz, personal communication)

The 'narrow' perspective focuses both on issues of internal governance - for example, ending corruption, equal opportunities - and on external governance - i.e. how improvements in internal governance relate to the quality of management of services and wider accountability. In this context, the issues of access to and representation of poor people generally and poor women particularly in institutions is crucial, for example in project management, local government and public administration. Also important is the accountability of public administration to the poor, particularly poor women. In the broader context there are a wide range of issues relating to gender and the governance of societal institutions, including the family, local government, decentralised service provision, labour and other markets; some of these are touched on below.

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[6] Democracy, respect for human rights and the rule of law, and efficiency, accountability and transparency in government and public administration are identified by one source as the main ingredients of good government, from a donor perspective. Broader concerns might include popular participation, equity and poverty and a commitment to market-oriented policies. Aside from punitive measures (e.g. the withdrawal or reduction of aid, sanctions or even military intervention), measures to promote good government include public sector reforms (particularly favoured by the World Bank), such as better managment of the public sector, civil service reforms, greater transparency and accountability in government, strengthening the legal system and the police. Wider political reforms advocated under the good government rubric include training journalists and promoting a free press, providing election monitoring, encouraging consititutional reform and assisting new political parties. (IDS, 1995).

Many of the policy elements of the governance agenda have been promoted with little consideration for questions of gender. For example, democratisation does not guarantee increased women's participation or representation - in some instances it appears to do the reverse, as, for example, in Eastern Europe post 1989. The liberal political model underlying the promotion of multi-party democracy tends to assume the neutrality of government and state institutions.[7] In the rush to promote multi-party democracy, issues of representation by gender tend to be overlooked. Analyses of gender issues in electoral process, or of the gender composition of the electorate, are rare in developing country contexts[8] Nevertheless, democratisation may bring opportunities for women and women's organisations to use their bargaining power in order to secure policy commitments.

Constitutional and legal reform has been a major strategy of the women's movement in different contexts, including in developing countries, to improve women's rights and access to resources (e.g. through inheritance, maintenance payments). Legal reform campaigns have taken place particularly in relation to personal and family laws, which are exempt from constitutional rights or guarantees of equality and governed by cultural or religious norms. In spite of their success in some instances, there is now considerable disillusion with legal reform campaigns. Legal reform in itself may be ineffective without measures at local level to support women's capacity to claim their rights, through, e.g. legal literacy and education, legal aid provision and social mobilisation. Training and reform of the police and judiciary is also required.[9]

7.2 Public administration and civil service reform

The reform of public administration and the civil service is important in relation to poverty in two ways: first, in terms of the outcomes of public policy as affected by decision making within the administration; and second, in terms of the direct effects of civil service reform in creating 'new' poverty, through retrenchments. Arguably, public sector retrenchments have had a greater impact on men than women although comprehensive data are not available.[10] Other gendered aspects of civil service reform have received limited attention.

Civil service reform needs to take account of nominal, substantive and organisational gender biases. For example, mechanisms are needed to prevent women from suffering disproportionately from retrenchments and/or from being overlooked in compensation arrangements. In processes of restructuring pay and incentives, as has occurred particularly in Africa, there is a need to examine whether gender-biased structures and incentives systems are being created which give greater rewards to men and prevent women from advancing within the hierarchy, or create entry barriers to women at

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[7] This view is consistent with liberal feminism but would be challenged by other strands of feminist and political theory.

[8] E.g. are women included in candidate selection? Are they selected for winnable seats? How many actually win? What proportion of women take part in the electoral process? What are constraints to their participation? What influences the voting behaviour of women?

[9] Women's organisations have tackled the area of police training (e.g. in Latin America generally, India), specifically around the issue of violence against women, and changes in practice have occurred as a result, including the setting up of women's cells and women's police stations.

[10] This may be particularly the case in Africa; in Latin America, women's representation in the public sector is higher and therefore the impact of retrenchements on women may be greater.

higher levels. Concerted action is needed to promote women to higher grades. The placing of teachers and nurses within public sector regrading exercises will be particularly crucial for women.

The lack of representation of women in policy making outside of the 'welfare' sectors also needs to be addressed. Until women are adequately represented in core decision making around economic policy, it is unlikely that women's interests will have any influence over policy decisions.[11] Nominal and organisational gender biases at lower levels of the civil service/public administration also need to be considered, for example, the lack of female agricultural extension officers or loan officers and/or the structures and cultures within organisations which create divisions in service delivery along gendered lines (e.g. women receive home economics training rather than support to increase their agricultural productivity). (Staudt, 1991).

Quotas are one mechanism whereby attempts have been made to increase women's representation (in political parties; in local and national government; in public sector employment). These have been extensively applied, for example, in South Asia (India, Pakistan, Bangladesh) but have proved problematic. Reserved places tend to get co-opted by women representing the interests of wealthy or elite interest groups; women who gain power/employment through quotas are seen, and perceive themselves, as token representatives with no real influence; and quotas (often less than 50 percent) tend to act as ceilings on women's representation and employment. Where successful they can create ghettos of women (e.g. among primary teachers) and roles filled by women become lower paid and lower status than those of men. Moreover, without appropriate training, support and awareness raising within institutions and wider society, quotas will remain unfilled due to the lack of 'suitable' candidates.

Strategies to challenge gender bias in public administration need to look to constituencies and advocates outside the public sector (e.g. women's movement, NGOs, progressive political parties) as well as working with influential women within the bureaucracy.

7.3 Family governance

One key area of social organisation and state policy where gender bias is very apparent and has a direct relation to poverty, is **family governance**. Folbre (1991a; 1991b) traces the historical development of systems of family governance in Sub-Saharan Africa and Latin America and the Caribbean, looking at both traditional systems, the impact of colonialism and the more recent evolution of family law and social security policies.

In Sub-Saharan Africa, the colonial legacy is one of non-interference in family governance and of the establishment of very limited social insurance policies (covering only a tiny fraction of the labour force) on a male breadwinner model. Female headship is more a rural than an urban phenomenon in Sub-Saharan Africa (c.f. Latin America), especially in southern Africa, strongly related to the development of migrant labour systems. Traditional law and culture are more important influences on household formation and welfare than social security systems.

[11] However, the presence of women in itself does not guarantee that women's interests, particularly those of poor or minority women, will be represented.

Public policies and transfers have contributed to the maintenance of patriarchal systems of family governance, for example, through social security and child support arrangements. In general, there has been a failure to enforce men's child support responsibilities. **In many developing countries, there has been a breakdown of traditional patriarchal systems of family governance and these have often been not been replaced by societal/state mechanisms of protection or welfare provision, leaving women vulnerable to poverty.**

For example, in Latin America, social security is relatively widespread for employees (43 percent of the labour force are covered), especially in Brazil (90 percent). However, individual women are much less likely than men to be formal sector employees covered under such systems. Moreover, they are more likely to be part-time workers or have interrupted employment patterns and thus have lower entitlements to social security. Further, the partners and children of female employees receive less benefits on the death of the female worker, compared to those awarded to widows. Claims on benefits by women are also limited by the high proportion of non-formal unions in Latin America. There are certain exceptions to the rule in terms of public policy. For example, Jamaica, Cuba, and Nicaragua have legislation to enforce men's child support responsibilities. The implementation of the law is uncertain in these cases.

Folbre concludes that:

> there is considerable need for policies that could improve the welfare of families maintained by women alone in the developing world. Specification and enforcement of father's child support responsibilities would not only benefit children, but also would increase men's incentives to share responsibility for fertility decisions and decrease their incentives to default on family responsibilities. Reform of existing social security systems would lead to a more equitable distribution of public transfers across social classes and to greater benefits for families maintained by women alone. (Folbre, 1991a: 33).

7.4 Participation and decentralisation

Decentralisation - of local government but also, for example, of health and education delivery systems to lower levels - holds out some hope for greater accountability in resource allocation to local populations . However, this will only happen where there is a genuine transfer of power, including increased local-level access to resources and/or ability to generate revenues. Decentralisation also brings the danger that power and resources will be captured by local elites or vested interest groups; in such a context, any national level gains for women - for example, in legal reform - may be counteracted at the local level.

Effective women's representation in local government is necessary to ensure that resources are allocated in women's, as well as men's interests. Quotas (see 7.3 above) remain controversial and are not always effective in enhancing genuine participation; additional mechanisms are needed, for example the building of alliances between women in local government and NGOs.

In the community management of service delivery, there has been increasing attention to women's participation but in many instances this has translated into voluntary labour

without any reallocation of project resources to women. Further, community participation in service provision is often accompanied by the introduction of community financing. The introduction of user charges and fees may have specific implications for access to and use of services and for divisions of responsibility for expenditure within the household. (Baden, 1993b). For example, in Uganda, community management of schools has led to higher income families, and men especially, taking control of parent teacher associations (PTAs) which set school fees. These have often been set at a level which excludes poorer children. (Goetz and O'Brien, 1995).

7.5 Market governance and regulation

The promotion and support of market-oriented development is a central feature of current development strategies and policies. During the 1980s, particularly, there was a strong emphasis on liberalisation and deregulation of markets; indeed the market-oriented approach is often hostile to any form of intervention in markets. However, there is now increasing recognition that some degree of protection or intervention may be required to ensure basic rights.

There are aspects of state regulation of markets which penalise women and poor women in particular and these deserve greater attention than they currently receive. For example, women working in the informal sector are frequently targets of harassment, confiscation of goods and even arrest, often on arbitrary grounds, such as suspicion of being a prostitute. The police exercise such powers over poor women with impunity. Obtaining licences for informal sector activity can also be a lengthy, bureaucratic and expensive process which few poor women can afford. This increases the risks associated with their activities and reduces profit margins. Such factors create an extra layer of obstacles to women's access to higher paying market activities and serve to reinforce the gender biases within labour markets (see section 5) which contribute to women's poverty.[12]

At the same time, market deregulation (e.g. removal of minimum wages policies; reduction of public sector employment; relaxation of labour legislation) can have a particularly negative impact on women, where these lead to falling incomes for poorest workers, or erosion of employment standards favouring women (e.g. equal pay for equal work). In some instances (e.g. domestic workers in Latin America who are almost exclusively female) there may be a case for extending the provisions of existing labour laws to include sections of workers who have not previously benefited from any protection.

[12]Similarly, the poor generally, and poor women particularly, suffer the brunt of land-use regulations which are used by landlords and other powerful groups to evict squatters and bulldoze slums.

Gender, human rights and poverty

By Zoë Oxaal with Sally Baden

ACRONYMS

CEDAW	The Convention on the Elimination of All forms of Discrimination Against Women
ILO	International Labour Organisation
SEDEPAC	Servicio Desarrollo y Paz, A.C.,
SEWA	Self-Employed Women's Association
UNDHR	The Universal Declaration of Human Rights

8.1 DEBATES ON HUMAN RIGHTS AND POVERTY

8.1.1 Human rights, development aid and poverty

In the past decade human rights has entered the **stated areas** of interest of many development institutions. There are two main **areas** for this, the punitive use of aid withdrawal in response to human rights violations, and the promotion of human rights through donor assistance often under the sectoral heading of democracy, governance and human rights, of which a high proportion (up to 50 percent) goes to support the electoral process (Robinson, 1996). Human rights abuses by potential recipient governments have been used as criteria to withhold aid, and governments have been called on to 'democratise' and improve their human rights record. However, it is sometimes questioned whether such sanctions are an effective means of promoting human rights, or if their effect of punishing the poor for the actions of their leaders is not their most significant outcome (Tomaševski, 1992). In recent years, there has been increasing attention to human rights violations which occur in conflict situations, with growing donor support for conflict prevention, resolution and peace-building activities, with a strong focus on supporting human rights through promoting civil society organisations and the improved accountability of legal and political structures and processes.

Although human rights are now commonly cited in development literature as being integral to development, there is little attention to the human rights impact of development policies and programmes. One of the few instances where this issue has been successfully raised is to highlight the forced displacement of indigenous peoples as a result of large dam construction (Tomaševski, 1992). In conflict situations, there has been questioning of the principles (such as neutrality) underlying 'humanitarian' aid and a suggestion that human rights considerations merit higher priority in emergency responses (Byrne, 1995). Other, less broadly accepted, arguments about the impact of development policies on human rights include critiques of structural adjustment policies, which point out that in creating increased obstacles to the health and education of the poorest, these policies impact negatively on their human rights to life, education and health care (Tomaševski, 1992).

The debates on human rights and poverty have developed separately but there have been some attempts to link them and there are common threads. On the human rights side, there have been efforts to broaden the definition of human rights, to emphasise social and economic rights, encompass consideration of freedom from poverty as a human right, although these have not gained widespread support. On the poverty side, debates as to how poverty is defined and measured have brought political and legal aspects of poverty to the fore and increasingly agencies involved in tackling poverty are adopting a rights-based discourse. In both cases, cultural relativism has led to a questioning of whether the concept of universally applicable rights (or universally applicable definitions of poverty) is tenable.

8.1.2 Poverty in human rights discourse and practice

The meaning and content of human rights is an area of much discussion and continuous redefinition. For legal positivists, rights only exist where they are written into law and enforceable. For others, human rights are understood as universal moral principles. The Universal Declaration of Human Rights (UNDHR) (1948) is taken by many as a starting point for discussion of what human rights constitute. The existence of the declaration is seen to have prescriptive if not legal force as an institutionalised expression of rights. But it is questioned how far the institutionalising of rights has been significant for the upholding of those rights world-wide (Whitehouse, 1996). Appendix I gives a list of all the rights included in international human rights agreements.

The difficulty of defining human rights solely in legal terms points to the need for non-legalistic definitions. Rights discourse is based on the idea of universality, that certain rights are held universally regardless of culture, religion, nationality and sex. Moral theorists have sought to establish rights as existing whether or not they are formalised by legal systems (Whitehouse, 1996).

Cultural relativist arguments have been used to critique human rights discourse and practice. While cultural relativists rarely reject the notion of rights in its entirety, they frequently reject specific rights or the interpretation of those rights. One view is that human rights are used as instruments of neo-colonialist foreign policy by Western states. The development of international human rights has also been criticised for reinforcing 'western' notions of individualism and abstract ideals, rather than collective rights, communal interests and reciprocal responsibilities. The application of human rights instruments is seen to necessitate flexibility for prioritising certain rights over others, often leading to a stress on civil and political rights at the expense of social, economic and cultural rights (Brems, 1997).

Developments in human rights law have often been described in terms of 'generations'. Civil and political rights constitute the 'first generation' of rights, the dominant rights agenda supported by Western advocates. So-called 'second generation' human rights refer to economic, social and cultural rights and have been associated with the support from socialist and developing states. The 'third generation' of rights refers to group or people's rights (Charlesworth, 1994). Defenders of the distinction between these generations of rights, have argued that the emphasis on political and civil rights in international human rights results from the different nature of these rights. It is claimed that political and civil rights are 'real' rights in that they are enforceable and justicable, while social, economic and cultural rights do not lend easily to legal codification and cannot be enforced in a court of law.

The lack of widespread acceptance of second and third generation human rights means that economic and social aspects of well-being do not feature strongly in mainstream human rights discourse, which tends to address poverty mostly in terms of how the civil and political rights of the poor can be strengthened.

Contemporary forms of slavery

The existence contemporary forms of slavery, defined in international law include debt-bondage, serfdom, the trafficking of women and child servitude, is the subject of investigation by human rights groups, drawing links between poverty and the violation of human rights. For example, agrarian bondage in Pakistan is characterised by the buying and selling of peasants among landlords, the maintenance of private jails to discipline and punish peasants and a pattern of rape of peasant women by landlords and the police (Human Rights Watch/Asia, 1995). Where informal sector labourers and the landless poor have little access to institutionalised sources of credit, they must rely on loans from landlords, moneylenders and employers leaving them vulnerable to debt-bondage. In order to address these human rights violations, it is clear that the resource entitlements of the poor need to be improved and secured.

8.1.3 Poverty: needs, entitlements and rights

Defining and measuring poverty

Recent debate and research on the meaning and measurement of poverty has led to a questioning of over-reliance on standardised economic or biological measures for assessing poverty. Quantitative, universalisable definitions of poverty have been challenged by qualitative, context-specific and multi-dimensional understandings of poverty. Chambers (1997) points out that 'well-being means different things in different places to different people at different times'. The development of participatory approaches to poverty measurement has shown that people often stress lack of dignity and autonomy as important aspects of poverty (Baulch, 1996). Poor people are acutely aware of their dependence on powerful individuals and institutions and their lack of political clout or recourse to justice (Baden with Milward, 1995). Independence and local political influence, for example, have been found to compensate for lower income levels in participatory wealth ranking exercises.

There are parallels between poverty analysis which is critical of the applicability of universal standards of poverty measurement, and cultural relativist arguments questioning the universalisability of human rights. However, the debate on
poverty assessment also suggests that lack of rights are experienced by poor people themselves as a defining characteristic of their poverty.

Entitlements analysis

The recognition that poverty itself has political and legal dimension has also been developed in the literature on **entitlements**.[13] Sen uses entitlements analysis to show that upholding a system of legal rights, e.g. the rules of private ownership which make a person's holdings legitimate, can lead to 'catastrophic moral horrors' in which millions of people die. However, he asserts that most famines reflect 'entitlement failures' rather than illegal acts in which people's entitlements are unjustly violated (Sen, 1982, cited in Gore, 1993).

From needs to rights in poverty discourse

The development discourse is increasingly moving from a focus on 'basic needs' to a rights-based approach in tackling poverty.[14] This shift is exemplified by Oxfam's five- year campaign, launched in

[13]For Amartya Sen 'entitlements' refer to the *relationship between people and the commodities* they need to live, whereas rights are often characterised as relationships that hold between people, or between a person and the state. A person's entitlement's therefore rest on their position in a society and are determined by a range of economic, social, cultural and political factors. Entitlements theory focuses on the law and the legal system and is descriptive rather than prescriptive. The emphasis is on legal rights that do exist rather than moral rights which ought to exist. (Reference).

[14]The basic needs paradigm in development evolved in the 1970s with the disillusionment of the ability of policies of growth with redistribution to increase the welfare of the poorest. For example, the Director General of the ILO in

1995, to promote 'The Oxfam Global Charter for Basic Rights'. The charter states that every person has a basic right to: a home; clean water; enough to eat; a safe environment; protection from violence; equality of opportunity; a say in their future; an education; a livelihood; and health care, all rights which Oxfam claim are based on existing international rights instruments although in practice often not enforced.

In many respects Oxfam's 'Basic Rights' are similar to what were referred to as 'basic needs' (see footnote 3). Human rights and basic needs have been described as 'two sides of the same coin': a basic right is only an assertion of or a claim to a basic need (Whitehouse, 1996). This campaign clearly links the agendas of reducing poverty and increasing the recognition of human rights.

1976 defined basic needs as including; minimal consumption requirements for physically healthy population (food, shelter, clothing etc.); access to essential services and amenities (safe drinking water, sanitation, transport, health and education); access of all to adequately remunerated employment opportunities; and the 'satisfaction of needs of a more qualitative nature: a healthy human environment, and popular participation in making decisions that affect the lives and livelihood of the people and individual freedom' (ILO, 1978, p.7 cited in Whitehouse, 1996).

8.2 HOW MAINSTREAM DEBATES HAVE ADDRESSED ISSUES OF GENDER EQUALITY

8.2.1 Women's rights and international human rights

Feminists have been critical of the conventional human rights discourse and instruments, for assuming equal treatment according to a sex-neutral norm. It is argued that international human rights law has not been applied effectively to redress the disadvantages and injustices experienced by women solely because of their gender. The distinction between the 'public' and 'private' spheres of society can present obstacles to women's rights. The public sphere or sector of legal and political order is contrasted with the private arena of home and family where states may claim it is outside their responsibility to intervene. Abuses of women's rights (e.g. domestic violence) often occur in the 'private' sphere where states are reluctant to act. The dominant focus on political and civil rights in the understanding of international human rights law is therefore biased to the male-dominated public sphere (Cook, 1993).

The Convention on the Elimination of All forms of Discrimination Against Women (CEDAW), established in , has developed the legal norm of non-discrimination contained in earlier human rights instruments and moved towards recognition that the particular nature of discrimination against women requires specific legislation.[15]

More recently, the women's human rights movement has had a large impact in expanding internationally recognised human rights to include rights particularly relevant to women, and in raising the visibility of abuses against women. The Vienna Declaration and Programme of Action adopted by the World Conference on human rights (1993), stated:

> the human rights of women and of the girl-child are an inalienable, integral and indivisible part of the universal human rights. The full and equal participation of women in political, civil, economic and social and cultural life, at the national, regional and international levels, and the eradication of all forms of discrimination on grounds of sex are priority objectives for the international community.[16]

Gender based violence, in particular, has been a high profile issue in the advocacy of women's rights as human rights, including rape as a weapon of war and tool of political oppression; sexual assault of refugee and displaced women; abuses against women in custody; and domestic violence (Human Rights Watch, 1995).

The recognition of women's human rights in international instruments has not been matched by progress towards and enforcement of these rights by state bodies, as the earlier example of CEDAW shows. The effectiveness of CEDAW is compromised by the inadequate technical and financial resources and its inability to consider individuals' claims against states (Human Rights Watch, 1995). Government reports (which are rarely self-critical) are the only means of examining the application of the Convention. Many governments have yet to ratify the Convention, and many of those which have ratified it submitted reservations which in some cases seem contrary to the very aims of the Convention (Tomaševski, 1993).

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[15] CEDAW was drafted through the Commission on the Status of Women, not the Human Rights Commission as other human-rights treaties have been.

[16] 'The Vienna Declaration and Program of Action', adopted by the World Conference on Human Rights June 25, 1993, pp.33-34 (cited in Human Rights Watch, 1995)

Work on women and human rights has sought largely to extend existing human rights frameworks to include rights abuses particularly suffered by women.[17] It has been viewed as strategically necessary for the women's rights movement to not undermine the concept of the universality of human rights, at a time when forces of fundamentalism have rejected rights on the basis of cultural difference (Facio, 1995).

Nevertheless, feminist rights advocates have argued that the divide between political and civil and economic and social human rights is arbitrary. The realities of women's lives do not permit a distinction between one set of rights and the other. For example, women are frequently unable to enforce their political and civil rights in a court of law because of their economically dependent status. Women's realisation of their political and civil rights is linked indivisibly with the fulfilment of their economic, social and cultural rights. Women experience differential obstacles to enjoying their rights due to gender discrimination as well as to class, ethnicity, race, rurality or urbanity, age and region (Facio, 1995). A poverty focus on rights also highlights the significance of social and economic rights as governing poor people's access to resources (discussed further in section 4).

8.2.2 Gender and poverty

Poverty concepts and measures, like human rights discourse, have been critiqued from a gender perspective. Conventional measures of poverty have been based on male-centred notions of well-being and have not been sensitive to how gender discrimination mediates the impact of poverty on women. The focus on the household as a unit for analysing poverty conceals gender differentiation in intra-household resource allocation. A gender analysis of poverty stresses the significance of cultural context to manifestations of poverty for women. It also draws attention to the fact that increases in income or consumption in the household or community do not necessarily translate into gender equitable outcomes. Inequalities such as life expectancy, physical well-being, education and skills can reflect factors other than those which produce income/consumption poverty. As Naila Kabeer states 'not all women are poor and not all people are women, but all women suffer from discrimination'. Gender inequalities should be addressed as a matter of human rights (Kabeer, 1996, p.20).

Gender-based critiques of entitlements analysis have stressed how legal entitlements may be less significant to women than non-legal, non-governmental sites of rule-making and rule enforcement. Sen's separation of the formal rules of entitlement which are legal, and the 'informal' rules which are social, overlooks how the legal construction of the domestic sphere as 'private' and the legal sphere as 'public,' forms a basis for gender discrimination. A broader view of entitlements is needed which analyses the interplay between state-enforced legal rules and socially enforced moral rules in constraining women's command over commodities (Gore, 1993).

8.2.3 From women's needs to women's rights

Amongst gender advocates there has been considerable dissatisfaction with a 'needs' approach. 'Basic needs' in relation to women were seen to include only the practical needs of women such as food, clothing and housing rather than 'strategic' interests such as freedom from gender violence and sexual and reproductive freedom. The needs-based approach is thus limiting in terms of challenging existing social relations of gender (Facio, 1995).

[17]Amnesty International's 'Fifteen steps to protect women's human rights' is an example of the approach to women's human rights which extends the focus on civil and political rights to include women.

In parallel with mainstream development discourse, women and gender advocates have made a shift from discussing women's needs to women's rights and 'gender justice'. This is particularly marked in the field of reproductive and sexual health and rights, where the influence of women's rights activists has been such that many population and reproductive health organisations now claim to support women's rights and empowerment.

8.3. WHY A GENDER PERSPECTIVE IS IMPORTANT IN LINKING HUMAN RIGHTS AND POVERTY CONCERNS

8.3.1 Gender in poverty and human rights linkages

There is now widespread recognition that women face greater barriers than men in claiming existing rights and that women are vulnerable to specific forms of human rights abuse as a result of gendered power relations. Women's lack of human rights, however, is not reducible to an issue of poverty. Poor women face different barriers to poor men in realising their rights. Women in wealthy households may face restrictions on their rights (e.g. freedom of movement) or be vulnerable to violations, such as enforced seclusion or marriage and domestic violence.

However, women's lack of, or weak and poorly enforceable rights, over property, in the labour market and in the home, means that they are more vulnerable to poverty than men. The contingent nature of women's rights over resources and property, often secured through family or marriage ties, means that even women in wealthy households are vulnerable to poverty, especially in the event of separation, divorce, widowhood or other household breakdown. Poor women's political and civil rights are hampered not only by human rights violations perpetrated by the state, but also by their lack of access to and representation in institutions of political power.

Poverty often drives women into activities where they become vulnerable to human rights abuses, such as harassment or arbitrary detention by state agents, or violent reprisals where they are perceived to have transgressed gendered social norms in their efforts to secure a livelihood. While poor men may also be vulnerable to harassment, but the activities of marginal women are often more visible and attacks on them more overt and sexualised. Situations of worsening economic insecurity and increased poverty may lead to an increase in human rights violations. For example, whilst evidence does not suggest that violence against women is caused by poverty, women's lack of economic autonomy may force them to remain in violent households. The sense of powerlessness characteristic of poverty is particularly acute for women.

8.3.2 Gender inequality in personal and family laws

In many developing countries, women's lives are governed by a dual legal system of customary law, which may be regionally or ethnically based, and statutory law. In practice, customary law often overrides the formal 'universal' rights to equality accorded in constitutional law, particularly in areas such as marriage, divorce, property and inheritance. In some instances, customary or religious laws directly contradict principles of gender equality. In others, while certain provisions of customary or religious law may appear to protect women from abuses, in practice, they are often applied in discriminatory ways, or not applied at all.

In many countries, the quality of women's citizenship is reduced by a *de facto* minority status, whereby they are considered the charge of fathers until marriage, and thereafter, must ask husbands' for permission to engage in many public activities. Laws based on the notion that a wife is the property of her husband, deny women rights over their own property and person, and restrict their ability to control resources.

The case of India exemplifies the complexity of women's legal rights in the area of personal or family laws. The 1949 Constitution of India contains articles mandating equality and non-discrimination on the grounds of sex. However, limited changes have been made to existing laws which discriminate

against women, to bring them into conformity with Constitutional principles. There has been some reform of Hindu personal laws, and of criminal law relating to violence against women, largely as a result of the sustained campaigns of women's groups. But these changes have been inadequate, despite the government's ratification of CEDAW in 1993. In spite of amendments to dowry and rape laws during the 1980s, these laws have not been implemented (Singh, 1994). The famous Shah Bano case illustrates the problems which India's personal laws pose to women's rights (see Box 1)

Box 1: Divorce and maintenance rights: The Shah Bano controversy

In India, the famous 1985 *Shah Bano* judgement involved a Muslim woman who was awarded maintenance payments in the High Court, after being thrown out of her house by her husband after thirty years of marriage. Her husband appealed to the Supreme Court, arguing that under Muslim personal law he was not liable to further maintenance payments. The Court rejected this argument. Women's groups campaigned in support of the Shah Bano judgement to uphold a deserted and destitute woman's right to maintenance.

However, the judgement met with vehement criticism from fundamentalist Muslims who described the judgement as unacceptable interference in Muslim personal law. They argued for the introduction of a bill which would exempt Muslim women from Section 125 of the Criminal Procedure Code. The government eventually bowed to this pressure and introduced a Muslim Women's Act. A Muslim husband is now only legally obliged to return the divorced wife's dowry, and maintain her for just three months following the divorce. Shah Bano herself came under increasing pressure to withdraw her case and eventually did so due to social ostracism.

Sources: Singh, 1994; John, 1995

Laws relating to the inheritance and ownership of property frequently discriminate against women, and are clearly factors underlying women's vulnerability to poverty. However, changes in the law to increase women's rights in this area can prove difficult to enforce, as the example of the 1985 Intestate Succession Law in Ghana, illustrates (Box 2).

Box 2: Women's property rights: The intestate succession law in Ghana

In Ghana, the Intestate Succession Law was introduced in 1985 with the aim of creating some degree of economic security for women across all forms of marriage. Previously, under matrilineal and patrilineal customary systems, a woman had no direct rights to her husband's property where no formal provisions had been made and her husband died intestate. The new law altered the position in theory, and protects the rights of women (particularly from matrilineal communities) who are vulnerable to dispossession on the death of an intestate spouse, by his relatives. A surviving spouse is entitled under the law to the house of the deceased, and the spouse and children are entitled to one quarter and five eighths respectively of intestate property. In practice the implementation and enforcement of this legislation has proved difficult. Cases have been reported where the police have failed to take action to prevent the interference of relatives and others with intestate property upon the death of a spouse, in spite of this being a criminal offence under the new Law

Source: Baden *et al*, 1994.

8.3.3 Gender discrimination in economic and social rights

Human rights abuses which prevent women from obtaining livelihoods clearly link to poverty. Discrimination against workers on the grounds of sex or maternity is prohibited under international human rights law, and under the domestic laws of many countries, and yet it is routinely tolerated by many governments (Human Rights Watch, 1995). Domestic workers, of whom a large proportion of are women, are often excluded from labour protection provisions. Women workers also experience sexual and physical violence by their employers. However, violence and discrimination against women in the workplace has received little attention in traditional human rights documentation and advocacy, which has focused instead on government crackdowns against predominantly male trade union organisers (Human Rights Watch, 1995). Female migrant workers are a particularly vulnerable group, as shown in Box 3.

Box 3: Exploitation of female migrant workers

Asian migrant women employed as domestic workers in Kuwait are particularly vulnerable to abuse, as they frequently are unfamiliar with the language, laws and systems of the country. Many such women are trafficked illegally with little knowledge of what awaits them. The embassies of Sri Lanka, the Philippines, Bangladesh and India in Kuwait are visited daily by runaway domestic workers seeking refuge. It is reported that these women are commonly subject to rape, physical abuse and mistreatment. Kuwaiti law excludes domestic workers from the country's labour law protections thus exacerbating the problem. Debt bondage, denial of one's passport and confinement are also common abuses (Human Rights Watch, 1995).

Women home workers are another vulnerable group with little effective protection under the law. Home-based production is particularly significant in countries where female seclusion is the norm. In Pakistan, for example, 53 per cent of urban workers are home-based. Homeworkers suffer isolation and a weak bargaining position. Their dependency on 'middlemen' to supply material and purchase goods leads to exploitation. A study of ILO member states showed that only India, Japan and Morocco among Asian and North African countries have relevant specific homework legislation (Moghadam, 1993).

Social and economic human rights raise issues of state responsibility to prevent poverty, and to provide a level of social security. Many social security systems in developing countries are urban biased. Schemes often cover only the 'employed' population (i.e. those in formal sector jobs) and exclude casual workers, agricultural workers, domestic servants, homeworkers, family labour and the self-employed. Such social security systems, especially in Asia and sub-Saharan Africa, cover only a very small share of the population, and are indirectly discriminatory since women are usually under-represented in formal sector occupations. These schemes, by and large, do not address the diversity of female economic activity, the diversification of family forms, female maintained households and other factors of significance to poor women (Moghadam, 1993). Lack of pension rights may lay women particularly prone to poverty due to higher life expectancy and the vulnerability of widows.

8.3.4 Abuses by state agents

Documented human rights abuses by governments tend to focus on the denial of civil and political rights and particularly on political prisoners and cases of torture. While often recognising the impact of this on families and on individual women activists, less attention has been given in mainstream human rights work to other kinds of abuse specifically affecting poor women.

Informal sector women workers frequently suffer abuse and harassment from state agents such as the police. In Ghana, in the late 1970s and early 1980s, the scapegoating of women traders and entrepreneurs by the State led to harassment and physical violence against women by members of the armed forces, including humiliation, public flogging, rape and confiscation of property. Informal sector workers in Zimbabwe have been subject to arbitrary arrest in the name of controlling prostitution (Baden, 1997). In Turkey, police have detained women under prostitution laws and subjected them to forced 'virginity control exams' (Human Rights Watch, 1995). While such abuses affect all women, poor women attempting to survive by working legally or illegally as prostitutes, or doing other work on the streets (e.g. street vendors) are more vulnerable to police detention and abuse, and less likely to have means of redress. Moreover, economic decline and ensuing income poverty may increase the dependence of women on sex work (Marcus, 1993).

The Convention for the Suppression of the Traffic in Persons and the Exploitation of the Prostitution of Others outlaws the exploitation of prostitution and obliges governments to eliminate this, as does CEDAW. And yet these laws are more likely to be used against women as prostitutes than against (predominantly) male exploitation of prostitution. In Bombay, for example, police harassment of commercial sex workers has been described as commonplace and women are far more likely to be arrested for 'indecent behaviour' in a public place, than are men to be arrested for trafficking, pimping or running brothels (Human Rights Watch/Asia, 1995). The extreme state violence that has been directed at prostitutes is exemplified by the case of approximately twenty-five Burmese prostitutes deported from Thailand who were reported to have been executed by the Burmese military because they had been infected with the HIV virus (Fitzpatrick, in Cook, 1994)

Whilst not directly related to poverty, other forms of abuse of women's human rights committed by state agents include the widespread incidence of rape in situations of imprisonment, conflict, and the sexual abuse of refugee women.

8.3.5 Poverty, gender and 'powerlessness'

Women's scope for redress against human rights abuses is limited by the nature of institutions associated with human rights, specifically the legal process, and by other entrenched gender biases. Women, especially poor women, are more likely to be illiterate and uneducated and less informed of means of legal redress. They are also less likely to have command of the independent finance necessary to take legal action on their own behalf (Baden *et al*, 1994).

Legal aid may provide access to legal institutions for poor women to uphold their human rights. However, conventional forms of legal aid may still be inaccessible to poor women and new initiatives are needed in the area of legal literacy, human rights education, legal resources for the poor, and alternatives to lawyers. Even where women are able establish their rights in the courts, upholding those rights in the community may prove very difficult. Section 5 explores a range of strategies to address these problems.

8.4 IMPLICATIONS FOR POLICY AND PRACTICE OF A GENDER PERSPECTIVE ON HUMAN RIGHTS AND POVERTY

8.4.1 Current assistance to promote human rights

A range of strategies are currently supported by donor agencies for the promotion of human rights including:

- changes to legal systems;
- improvement of the administration of law, e.g. the training of judges and lawyers in human rights issues;
- improvements in the accessibility of legal instruments and institutions;
- legal and human rights awareness/literacy campaigns.

In as much as these strategies address issues of poverty, the main focus in on making existing laws and legal systems and procedures more accessible to the poor. Of particular importance to the poor are efforts to ensure that poor people feel confident to go to court and defend their rights, and that they are treated with respect and impartiality by the police and courts. Simplification of legal procedures and language are particularly important in this respect (Sida, 1996). Many legal awareness and literacy efforts have emerged through NGO activities in poor communities.

Much assistance under the heading of democracy, governance and human rights has gone to electoral assistance or is channelled through NGOs. Evaluations of this kind of assistance especially in the area of democratisation are few but it is clear that this assistance contributes to procedural rather than substantive democratic reform (Robinson, 1996). Such assistance may be of greatest benefit to the educated and articulate middle classes, who are well positioned to enter positions of political influence and have the resources to set up organisations. The poor may gain indirectly as beneficiaries of increased NGO activity.

Current processes of legal and political reform in general support the introduction of multipartyism and strengthening of individual property rights, alongside market-based development. Strengthening individual property rights, in particular, may threaten the access to resources or economic security of poor and marginalised groups, where there are limited safeguards on their existing rights, and/or where there is competition over scarce resources, particularly land.

8.4.2 A gender perspective on strategies to promote human rights

Sustained campaigning and international networking by women's organisations have resulted in a significant shift in the human rights agenda, to encompass the need to protect women from human rights abuses, particularly violence against women, including in the domestic domain. This shift has translated into real changes, as in cases of asylum being granted on grounds of gender-based persecution, and the recognition of rape as a war crime. More generally, rights-based arguments have been deployed successfully to build international alliances and change the discourse, for example, relating to sexual and reproductive health. Rights-based arguments have had less impact in areas relating directly to poverty concerns.

Recent donor preoccupation with governance, including human rights issues, has created a space for advocacy on women's rights and, particularly, the promotion of women in political life, within programmes of political liberalisation. However, there is a tendency to concentrate on narrow, legalistic definitions of rights and also the danger that the conditionality linked to human rights

arguments, may, in fact, have negative consequences on poor groups. The preceding analysis highlights the need for:

- **Greater emphasis on the use of human rights and legal instruments to secure women's economic and social rights** (e.g. labour, land, social security, maintenance, inheritance). This should always be done in consultation with relevant organisations in the country concerned;

- **Greater focus on implementation and enforcement of existing legal/human rights instruments, from a gender perspective**, including at international, national and local levels. This includes research into the effectiveness of existing implementation mechanisms, as well as technical and financial support to appropriate monitoring and enforcement systems.

- Alongside support to the reform of legal systems, the **promotion of women's involvement in debates around legal and constitutional reform;**

- **Support to legal and human rights work of existing NGOs working with poor communities, especially women,** e.g. provision of grassroots legal and human rights education, training, advocacy and legal aid services;

- **Measures (legislation, training, accountability mechanisms) to reduce harassment and abuse by state agents (particularly police) against women in the informal sector**;

- **Evaluation of the gender impact of funding civil society organisations** engaged in human rights activities.

The sections below give examples of actual or possible interventions in some of these areas.

8.4.3 Using human rights and legal instruments to promote women's social and economic rights

Discrimination in access to land on the basis of sex violates international human rights law, if it is unable to pass the international standards of 'objective and reasonable justification'. In many African countries, there is discrimination against women in opportunities to acquire, hold and deal in land. In Tanzania and Uganda, the law determines access to land on the basis of sex, contrary to international human rights law (Butegwa, 1994). Box 4 discusses the potential for using human rights instruments to uphold women's land rights.

Box 4: Using human rights instruments to promote women's access to land

Butegwa (1994) has examined the extent to which the African Charter on Human and People's Law can be used to secure and promote women's access to land in Africa. Each state party to the Charter is obliged to publicise the rights guaranteed by the Charter and the obligations of private individuals and state organs to respect those rights. Butegwa claims that there is an explicit state obligation to ensure that non-discriminatory laws are understood by both the populace and by its own agents. The fact that the provisions of the Charter explicitly prohibit discrimination on the basis of sex and impose stringent obligations opens up the possibilities for using the African Charter to secure women's access to land in Africa. This, however, depends on improving the effectiveness of the African Commission on Human and Peoples' Rights set up by the Charter for enforcement, through inadequate institutional and financial support. Research is required on the plausibility of arguments invoking customary law and practice to deny women access to land, which need to be countered by data showing that the tenets on which the customs were based are no longer valid.

There is also a need for legal awareness and technical knowledge of the Charter and Commission among women and African NGOs. Although some women's NGOs are working to increase women's legal awareness, these NGOs are headed by women lawyers who are knowledgeable in domestic laws but not conversant with international human rights law.

Source: Butegwa, 1994.

Cases show that change in national law in favour of women rights is possible. For example, in Tanzania, the case of Ephraim v. Pastory, Ephraim challenged the customary law that prohibited her from selling the clan land she inherited from her father (Mwanza, 1990). The High Court ruled for the modification of customary law so that women had exactly the same rights to sell land as men, and the judge noted that the Women's Convention and other international human rights treaties containing gender equality should apply in interpreting customary law. In Botswana, the High Court struck down two citizenship laws as discriminatory against women, when a woman challenged the law that her children could not be citizens of Botswana because their father was not a citizen (Tomaševski, 1993). Box 5 summarises strategies for promoting women's rights through the legal system.

Box 5: Strategies for changing the legal system to address women's rights

1. Affirming the universality of women's human rights regardless of culture or religion

2. Using existing laws for legal activism and seeking legal reform through the reinterpretation of accepted laws.

3. Questioning of the constitutionality of biased laws and justice system practices, and making links between human rights violations and laws oppressive to women e.g. in the areas of personal law, family law, violence against women, reproductive rights.

4. Using international law and standards to push for reform, through cases brought in international fora or by using international principles to set standards for domestic law.

source: Tomaševski, 1993

In situations of poverty women are unlikely to have the time and resources necessary to take up cases such as those mentioned above, so that organisational backing is required.

Labour legislation is an important area of rights under national law, and yet women workers are often excluded from the rights they might enjoy under such legislation because so much of their work is in the 'informal sector'. Given the growing casualisation of labour globally, conventional forms of employment protection and legislation may be ineffective.

New forms of protection for workers rights must be developed, a process in which the international framework of standards contained in human rights law may be of increasing relevance. The ILO Homeworking Convention (June 1996) may provide a new mechanism for monitoring conditions of work in the informal sector, of particular relevance to poor women. The potential for application of this new Convention in the interests of poor women would be increased by research highlighting the strengths and weaknesses of mechanisms for enforcing existing labour legislation, and by consultation with organisations of informal sector workers, such as SEWA in India.

Attempts have been made to link trade policy to improved labour standards in order to combat child labour and gender discrimination. This may offer some protection to the rights of women and girls at work, but may also raise the danger of increasing poverty where there are no alternative sources of livelihood available as in the case of girl workers in the Bangladeshi garment industry (see Box 6 below). Changes in trade policy to improve labour standards should be made only after consultation at different levels, e.g. international, business owners, development workers, NGOs, and workers organisations. It is particularly important to develop strategies to support those most affected by such changes, to prevent the counterproductive scenario of workers being forced into even worse conditions.

Box 6: Trade policy, human rights, and girl workers in the Bangladeshi garment industry

Five million people are estimated to be dependent directly or indirectly on the Bangladeshi garment industry. Over 50,000 girls are thought to have been made redundant as a result of the US. Harkin Bill, which legislates against US imports of garments produced by children under 15. These redundancies have caused hardship for girls and their families who have relied on their income from the garment industry, and have few alternative sources of livelihood. Many sacked underage garment workers go on to work in informal sector production, much of which is involved in sub-contracted work from registered factories.

These moves to improve employment conditions have been described as negatively impacting on the basic human right to life, and the need for children to contribute to poor families' incomes, without providing an alternative livelihood for child workers and their dependants. A small-scale programme has been introduced to benefit retrenched girls in the form of an 'education programme' for 7-8,000 girls, after pressure from international and Bangladeshi human rights organisations, trade unions, and ILO, USAID and UNICEF.

source: Wahra and Rahman, 1995

8.4.4 Promoting women's participation in legal and constitutional reform processes

Consultation with individual women and women's organisations is vital to ensure that new legislation takes account of women's gender interests. However, this requires awareness of the constraints to women's participation in public processes, and imaginative use of media and pro-active consultation mechanisms. Formal meetings, public broadcasting and similar channels, in many instances, may not reach women, particularly poor women. Separate, informal gatherings, in places where women congregate in their daily activities, may be necessary. Box 7, on Uganda's approach to drafting the new Constitution, illustrates some of these issues.

Box 7: Uganda's participatory approach to drafting the new Constitution

In Uganda, the Constitutional Commission embarked on one of the most inclusive, participatory approaches to soliciting the nations view's on the new Constitution. The methods used included meetings and brainstorming all over the country and the acceptance of written memoranda from any citizen. Explicit instructions were provided as to how citizens should make an impact. It soon become clear, however, that women were not participating at equal levels to men. One reason was that women would not speak up in public gatherings, for cultural reasons. Another problem was illiteracy. While this also affected men, they had more connections to organisations who could help them with writing memoranda. Once this was realised, separate women's meetings were held, to facilitate women's participation in a more inclusive way. (Goetz, 1995).

In Mozambique, recent debate on the new land law highlighted a number of concerns about the impact of the development of land markets on women's access to and control of resources, given their primary role in agricultural production. Provisions for land titling, which would strengthen small farmers' rights in the face of attempts to acquire land by commercial enterprises, have not been widely taken up, and even where women have titles in their own name, they do not necessarily perceive themselves as land owners. A few non-government organisations have been working to

involve local communities, including women, in the debate around land rights, and also to research the effects of current changes in land tenure on women's land rights (Waterhouse, 1997).

8.4.5 Provision of gender-sensitive human rights and legal education and legal services

Some NGOs providing services to women have incorporated legal services or training. For example the Bangladeshi Rural Advancement Committee offers paralegal training in its Village Organisations. *Profamilia*, a family planning association in Colombia offers a legal service to its users, with legal clinics attached to family planning centres (see Box 8). Including legal education and services in the work of NGOs working with women may provide a more effective means of targeting poor women than conventional legal aid.

Box 8: Legal services for reproductive rights in Colombia

Profamilia, a family planning association in Columbia started a Legal Service in 1987, with legal clinics attached to family planning centres. The purpose of the programme was to educate women about their rights, particularly in relation to the Right to Petition introduced in the 1991 Constitution. The service has helped women to use the petition to seek redress for violations of their rights resulting from violence in the family, unequal sharing of household work, denial of reproductive rights, lack of sex education, and denial of other forms of equal opportunity. The Legal Service also provided negotiation and mediating services.
source: Plata, 1994

The aims of legal literacy programmes can be expanded to include human rights education. Projects should be devised which develop women's understanding of government and civil society and of their civil and political rights (Freeman, 1993).

Training people in the law, as alternative lawyers, such as community workers and educators, advocates of collective demands and interest groups have been recommended as strategies to develop the legal resources of the poor (Dias and Paul, 1985). These kinds of strategies must ensure women's participation and include training in women's rights to avoid reinforcing gender discrimination. Confidence building may also be required to strengthen women's capacity to act in this sphere.

Services such as mediation provide an alternative to litigation as a dispute resolution mechanism, which are more accessible to poor people, and particularly women, who may be intimidated by formal institutions. However, the decisions given at these informal hearings are not necessarily superior to, or more easily enforceable than, the decisions reached in a court of law. Further research into the benefits of such mediation and the effectiveness of the resolutions agreed might be useful. From a gender perspective, research is needed on modalities for integrating these alternatives within the existing legal system.

8.5 AREAS FOR FURTHER RESEARCH

The preceding analysis highlights a number of possible areas where further research could usefully inform new directions in integrating gender, poverty and human rights concerns:

- **Research into effective ways of using human rights instruments to address gender bias in social and economic rights**, through invoking international conventions and constitutional provisions to challenge discrimination in the application of inheritance and maintenance provisions, land rights, employment rights. Follow up to individual judgements is also necessary to assess their impact.

- **Research on the interplay between legal entitlements and provisions and socially enforced rules or norms which limit women's command over resources, in specific contexts.** This may inform complementary actions which may be needed to ensure that women's legal rights can be asserted in practice.

- **Research and consultation on the likely impact on women's (as well as men's and children's) employment and employment conditions, of social and human rights clauses invoked in trade agreements** and on possible alternative livelihoods.

- **Evaluation of the effectiveness of existing mechanisms for monitoring and enforcement of human (especially women's) rights legislation**, in areas where their enforcement could have a poverty reducing impact, e.g. labour legislation.

- **Research into the impact of mediation,** from a gender perspective, and the effectiveness of the resolutions agreed; and also into ways of integrating mediation activities into legal systems

Gender, urbanisation and urban poverty

By Rachel Masika with Arhan de Haan and Sally Baden

ACRONYMS

FHH	Female headed households
ITDG	Intermediate Technology
NGO	Non-Governmental Organisation
UN	United Nations
UNCHS	United Nations Centre for Human Settlements

9.1 URBANISATION, URBAN POVERTY AND DEVELOPMENT: AN OVERVIEW

9.1.1 Urbanisation: an overview

In the past few decades, urbanization and urban growth have accelerated in many developing countries. In 1970, 37 per cent of the world's population lived in cities. In 1995 this figure was 45 percent, and the proportion is expected to pass 50 percent by 2005 (UN, 1995). Urban populations are growing quickly - 2.5 percent a year in Latin America and the Caribbean, 3.3 per cent in Northern Africa, 4 percent for Asia and the Pacific and 5 per cent in Africa (*ibid*). But, international comparisons are complicated by differing national definitions of urban areas[18]. In Eastern Europe, Latin America and the Caribbean, the overall ratio of women to men is higher in urban areas than in rural areas, and the inverse is true for Africa and Asia (see Figure 1).

Although in many third world cities natural population growth is the major contributor to urbanisation, rural-urban migration is still an important factor (de Haan, 1997). Internal migration flows are diverse, complex and constantly changing (including rural to urban, urban to rural, urban to urban, and rural to rural). There is much diversity between nations and regions in terms of the age and level of education of migrants, and in the extent to which migration is considered permanent or temporary. A key determinant of migration is the income differential between rural and urban regions (Gilbert and Gugler, 1992). Migration is also affected by crop prices, landowning structures and changes in agricultural technologies and crop mixes in surrounding areas and distant regions. It is also influenced by other factors related to individual or household structures and survival strategies, and wider political, economic and social forces (UNCHS, 1996).

9.1.2. Urban poverty: definitions, concepts and measurement

There is no consensus on a definition of urban poverty but two broad complementary approaches are prevalent: economic and anthropological interpretations. Conventional economic definitions use income[19] or consumption complemented by a range of other social indicators such as life expectancy, infant mortality, nutrition, the proportion of the household budget spent on food, literacy, school enrolment rates, access to health clinics or drinking water, to classify poor groups against a common index of material welfare. Alternative interpretations developed largely by rural anthropologists and social planners working with rural communities in the third world allow for local variation in the meaning of poverty, and expand the definition to encompass perceptions of non-material deprivation and social differentiation (Wratten, 1995; Satterthwaite, 1995a). Anthropological studies of poverty have shown that people's own conceptions of disadvantage often differ from those of professional experts. Great value is attached to qualitative dimensions such as independence, security, self-respect, identity, close and non-exploitative social relationships, decision-making freedom and legal and political rights.

Figure 1

[18]Definitions of urban areas are based on national criteria such as: population thresholds (e.g. settlements over 1,000 people qualify as towns in Canada, but the lower limit is 2,000 in Kenya, 10,000 in Jordan, 50,000 in Japan); density of residential buildings; type and level of public services provided; proportion of population engaged in non-agricultural work; and officially designated territories (Wratten, 1995).

[19]Justification for using income as a proxy for welfare is that it is highly correlated with other causes of poverty and is a predictor of future problems and deprivation (Wratten, 1995).

Source: UN, 1995

More generally, there has been a widening of the debates on poverty to include more subjective definitions such as **vulnerability, entitlement** and **social exclusion**. These concepts have been useful for analysing what increases the risk of poverty and the underlying reasons why people remain in poverty. **Vulnerability** is not synonymous with poverty, but refers to defencelessness, insecurity and exposure to risk, shocks and stress. Vulnerability is reduced by assets, such as human investment in health and education, productive assets including houses and domestic equipment; access to community infrastructure; stores of money, jewellery and gold; and claims on other households, patrons, the government and international community for resources at times of need (Chambers, 1995 cited by Wratten , 1995). **Entitlement** refers to the complex ways in which individuals or households command resources which vary between people over time in response to shocks and long-term trends. **Social exclusion** is seen as a state of ill-being and disablement or disempowerment, inability which individuals and groups experience. It is manifest in 'patterns of social relationships in which individuals and groups are denied access to goods, services, activities and resources which are associated with citizenship' (ILO, 1996).

9.1.3 Urban poverty: characteristics of urban poverty

Most studies attempting to describe urban poverty have focused on drawing out the characteristics of urban poverty, often by comparison rural with urban poverty. However, there is still much debate as to whether urban poverty differs from rural poverty and whether policies to address the two should focus on different aspects of poverty. In some views, rural and urban poverty are interrelated and that there is a need to consider both urban and rural poverty together for they have many

structural causes in common e.g. socially constructed constraints to opportunities (class, gender) and macro-economic policies (terms of trade[20]). Many point to the important connections between the two as household livelihood or survival strategies have both rural and urban components (Satterthwaite, 1995). Baker (1995) and Wratten (1995) illustrate this point in terms of rural-urban migration, seasonal labour, remittances and family support networks. Baker (1995) illustrates how urban and rural households adopt a range of diversification strategies, by having one foot in rural activities and another in urban. Conceptualising urban poverty as a separate category from rural poverty is also problematic because of different yardsticks for defining urban in different countries. The urban-rural divide is more a continuum rather than a rigid dichotomy.

9.1.4 Urban development policy

It is now widely recognised that the rapid growth of urban populations has led to a worsening in absolute and relative poverty in urban areas. Urban poverty has until recently, been low on the agenda of development policy because of dominant perceptions of urban bias and the need to counter this with a focus on rural development policy. However, policy interest in urban issues is increasing as a result of two phenomena:

- projections of a large and increasing proportion of poor people living in urban areas, partly as a result of urbanisation;

- and claims that structural adjustment programmes - which have removed some of the urban bias, by removing price distortions - have lead to a much faster increase in urban poverty than rural poverty.

There have been two broad traditions in policy approaches to urban poverty (Amis 1995; Moser 1995). The first set of approaches have focused on the physical infrastructure problems of housing, sanitation, water, land use and transportation. Recently there has been more emphasis on private investment and an increased focus on institutional and management aspects of urban development. The second set of broad approaches have focused on economic and social infrastructure issues such as employment, education and community services. Recently such approaches have put a lot of emphasis on sustainability issues and community involvement/participation in projects and programming.

More recently, concerns with the urban environment and violence and insecurity in urban areas have come to the fore as factors which undermine well-being and quality of life. There is some evidence of a strong relationship between poor health and poor environmental quality (Hardoy *et al*, 1992). The externalities of urban production are disproportionately borne by the poor because of the spatial juxtaposition of industrial and residential functions, high living densities, overcrowded housing in hazardous and inadequate supply of clean water, sanitation and solid waste disposal services (Wratten, 1995).

Urban violence is estimated to have grown by between three and five percent a year over the last two decades, although there are large variations between nations and different cities within nations. Violent crimes are more visible in cities and there is growing understanding that violence should be considered a public health problem for which there are prevention strategies. Urban violence is the result of many factors, and there is considerable debate about the relative importance of different factors. Certain specialists stress the significance of inadequate incomes which are usually combined with very poor and overcrowded housing and living conditions, and often insecure tenure, as fertile

[20]However, some macro-economic policies may affect rural and urban poverty in different ways.

ground for development violence. Other explanations emphasize more the contemporary urban environment in which attractive goods are continuously on display and create targets for potential criminals. Oppression in all its forms, including the destruction of original cultural identities, together with racism are also cited as causes (UNCHS, 1995).

9.2 GENDER, URBAN POVERTY AND DEVELOPMENT

Gender issues have been increasingly discussed in the mainstream literature on urbanisation and urban poverty.

9.2.1 Gender and urbanisation processes

The urbanization process is itself shaped by gender roles and relations. For instance the scale and nature of migration into urban areas in Latin America is much influenced by decisions in rural households about who should migrate and for what reason, by constraints placed on women's work outside the home by households, and by the demand for female labour in urban areas (Chant, 1992).

Some studies have highlighted the extent to which migration patterns are differentiated by gender (*ibid*). These studies have shown that female migration is of much greater volume and complexity than was previously believed and that migration has gender-differentiated causes and consequences. Female migration is increasing despite the constraints of women's dependent position within the family and society, as households are in need of income, and more employment opportunities are available to women (UN, 1995). In some towns and cities in Latin America and the Caribbean and parts of South East Asia, rural-out migration is female selective, urban sex ratios usually show more women than men and levels of female household headship are higher in urban than rural areas (*ibid*).

Nevertheless, in most of the developing world, single-male migration is more common. The effects of this on family structure, decision-making and women's autonomy and well-being are varied. Where family relations are strained by male absences and remittances are irregular or non-existent, it may lead to increased female poverty. On the other hand, households where women do receive remittances may be among the better off and gain independence and decision-making power through managing household resources.

9.2.2 Gender, urbanisation and household headship.

Urbanisation tends to affect gender roles, relations and inequalities (although with great variety in the form and intensity from place to place) since the factors responsible for female headed household (FHH) formation arise through urbanisation. This is evident in the transformation of household structures, the shifts in household survival strategies and changing patterns of employment (Chant, 1995[21], cited by UNCHS, 1996).

There is a tendency to equate the growth in FHHs with the growth in poor or disadvantaged households[22] - but female headship may have positive aspects. FHHs are likely to be less constrained b patriarchal authority at the domestic level and female heads may experience greater self-esteem, more personal freedom, more flexibility to take on paid work, enhanced control over finances and a reduction or absence of physical and/or emotional abuse. Female heads may be empowered in that they are more able to further their personal interests and the well-being of their dependants. Studies have shown that the expenditure patterns of female-headed households are more biased towards nutrition and education than those of male-households (*ibid*).

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[21]Sylvia Chant, 'Gender aspects of urban economic growth and development', paper prepared for the UNU/WIDER Conference on Human Settlements in the Changing Global Political and Economic Processes, Helinski, 1995.

[22]Women headed households are not always over-represented among the lowest income groups

However, while female-headed households may be better off in some ways, they may still face discrimination, may face greater difficulties than men in gaining access to labour markets, credit, housing and basic services, and there are sometimes additional layers of discrimination against female heads. Single parent households, most of which are FHHs also face the difficulties of one adult having to combine income earning with household management and child rearing and this generally means that the parent can only take on part-time, informal jobs with low earnings and few if any fringe benefits (*ibid*).

9.2.3 Gender and official assessments of urban poverty

There is limited consideration of gender issues with respect to measuring urban poverty, and identifying the urban poor. This has implications for the formation of policy and the design of anti-poverty programmes. A review of current approaches to understanding urban poverty points to the need of broadening the way urban poverty is understood and measured. Official indicators of urban poverty often do not take into account gender-biased aspects of household impoverishment or coping strategies, such as limiting expenditure or resource use in times of economic crisis. Conventional poverty lines give scant attention to health and social indicators hence failing to demonstrate the social and health dimensions of urban poverty which are heavily borne by women.

Consideration of urban poverty often neglects differentials between men and women in terms of their access to income, resources and services. Such differentials may occur within households between men and women or between individuals (i.e. between single men and single women) or between households with women-headed households at a disadvantage to male-headed households. There are also gender-based differentials in vulnerability to illness and violence (Wratten, 1995).

A gender equality perspective draws attention to the need for gender sensitive indicators of poverty. A way forward may be to develop indicators that measure gender biased factors influencing the severity of poverty, such as capacity to achieve success, gender differentiated needs, social and health dimensions of poverty etc. (see Box 1).

Participatory approaches to measuring poverty may have more scope for including a gender analysis. Participatory poverty assessments which are broadly informed by a theory of social capital (e.g. Moser, 1996) make visible the social norms and networks of supports of the poor, and highlight their capabilities, assets and resourcefulness. But they also need to be informed by frameworks which identify processes of social exclusion (Rodgers *et al*, 1995, cited by Beall, 1997).

Box 1: Gender-sensitive improvements to official assessments of urban poverty

Need to disaggregate needs since needs are often influenced by gender.
Need to take into account intra-household differentials. Households that appear to be above the poverty line may have members who suffer deprivation because they face discrimination in the allocation of resources within the household due to age, gender or social status.
Need to examine social and health dimensions of poverty. The deprivation caused by inadequate income is much reduced if those with low income have access to good quality housing (with adequate provision for water and sanitation) and health care.
Need to take into account non-monetary income sources e.g. goods and services obtained free, or below their monetary value and differential entitlement to these.
Need to develop more accurate measurements for capacity to achieve access to resources which is influenced by factors such as education, information, legal rights, illness, threatened domestic violence or insecurity.
Greater understanding of men's and women's relative command over assets is required. Low income households may have asset bases that allow them to avoid destitution when faced with shocks e.g. level of education and training. Women may have limited command over certain assets. On the other hand, women may have greater claims e.g. on social networks.
Underlying causes of poverty need to be examined. Structural causes of poverty and processes that create or exacerbate poverty (including gender) need to be considered.

Adapted from: Wratten, 1995; UNCHS, 1995

9.2.4 Gender and urban development

Feminist researchers have drawn attention to the fact that much of the literature on women, gender and urban development has fallen outside the mainstream. The realm of urban planning has been defined in physical and spatial terms, linked to men's work patterns, dealing with issues such as transport, housing, land and infrastructure whilst issues around health, education and the family, linked to women's work have been commonly dealt with as separate national level sectoral concerns (Moser, 1995).

In general, urban women's priorities have often been ignored in the design of human settlements, the location of housing, and the provision of urban services (Beall, 1995a). However, there is increasing recognition of the discrimination faced by women in most aspects of employment, housing and basic services, and greater efforts by some governments and international agencies to reduce or remove this (UNCHS, 1996).

9.3 DIMENSIONS OF URBAN POVERTY: WHY A GENDER PERSPECTIVE IS IMPORTANT

Gender equity considerations are important for any analysis of urban poverty conditions and trends. Men and women experience and respond to urban poverty in different ways as a result of gendered constraints and opportunities (in terms of access to income, resources and services). This section demonstrates why a gender perspective is important to understanding poverty by highlighting gender inequalities in key urban sectors.

9.3.1 Poverty, employment and livelihoods

There is gender-differentiated access to employment and income earning opportunities in urban areas. Unemployment and under-employment have been major concerns for many urban economies. Recent studies suggest the urban poor have suffered significantly from structural adjustment through reduction in employment creation and downward pressure on real wages. New categories of the poor have been identified, for example, former state employees who have been retrenched.

In general terms, there are two broad labour market trends: the feminisation of the labour force; and the deregulation and causalistion of the labour market. The rise in female labour force participation can be attributed in part to a rise in demand for female labour in industries, and in part to household survival strategies during economic restructuring. This has positive benefits for women given that social position within and access (both social and physical) to urban labour markets is critical for well being and survival. However, there is evidence that in many countries gender segmentation in the labour market remains widespread (Gilbert, 1997) and that women's work remains characterised by insecurity, low returns. Furthermore, many different facets of women's work, both unpaid and paid are not recognised by urban planners.

Research on two low-income settlements in Madras, India suggests that neither household structure nor the structure of the economy can provide an adequate explanation of either female labour force participation or the type of work women and girls undertake in Madras. Ideological factors and their 'enforcement' at the intermediate social levels of the wider kingroup and community are central to decisions regarding who works in the household and under what conditions. These ideologies are, however, not rigid dictates but guiding principles around which the household respectability is negotiated (Vera-Sanso, 1995).

The importance of the informal sector for income generation and poverty alleviation is well recognised. There is increasing reliance on urban informal employment for both men and women but the ability of the informal sector to absorb the unemployed is limited. There are gender-differentiated patterns of access to informal sector work. Research in Zimbabwe revealed that declines in women's earnings from informal sector activities also meant less control by the women of household budgets, lower self esteem and increased conflict with husbands. Several of those interviewed felt that the men were not fulfilling their obligations as husbands and fathers (Kanji, 1995).

The deregulation of and casualisation of the labour market has lead to an increase in homeworking particularly among women which sometimes leads to greater exposure to environmental risk both in terms of human pathogens and industrial toxic compounds at home or in the workplace (Gilbert, 1997; HomeNet, 1996).

9.3.2 Assets and consumption patterns

Evidence from cities as diverse as Guayaquil, Harare, and Guadalajara indicate that with declining incomes and high unemployment, households have modified their consumption and dietary patterns and adjusted household expenditures, in many instances in the direction of cheaper and less nutritious substitutes (Latapi and de la Rocha, 1995; UNCHS, 1996; Kanji, 1995; Moser, 1996). In Zimbabwe there is clear evidence that women have modified their lives to a greater extent than men. Women's responses were mainly individual, taking greater cuts in their own consumption, spending more time shopping for bargains and working longer hours for poorer returns (Kanji, 1995).

The critical importance of assets and debt to the survival strategies of the poor in face of economic shocks has gender dimensions. Moser (1996) identifies the major assets of the poor in the face of economic crisis: labour; social and economic infrastructure; housing; household relations; social capital. In many instances, women have less command over assets than men.

9.3.3 Violence in urban areas

An emerging area of concern is the increasing levels of crime and violence in urban areas. Important gender differentiation exists in terms of **violent response to unemployment**. While men turn to crime and violence, women more frequently turn to dependency on men. Research in Jamaica also points to important gender differences in terms of both involvement and impact of violence: economically motivated violence was seen primarily as involving men, while much of interpersonal violence, involved women. (Moser and Holland, 1995).

There is no conclusive evidence to suggest that gender-based violence in on the increase in urban areas. Some studies suggest that where it does occur, women have cited lack of money and food as most important cause of marital conflict, and alcohol or drug abuse as the main reason for wife beating. They attributed men's anger to feelings of frustration stemming from insufficient earnings (Moser, 1996).

9.3.4 Urban environment, health and poverty

The determinants of health in urban areas are complex, but social and cultural factors, including composition of the family, cultural restrictions are important (Fustukian, 1996). Poor health can reduce capacity to earn an income, and health treatment can use up scarce savings or lead to debt. Women play a crucial role in informal health-care in low-income households and communities in their role as wives and mothers, and continue to be used as conduits to children in promotional and preventative health campaigns, for example around nutrition and immunisation.

For South Asia as a whole it has been suggested that in the case of the urban poor, ill-health is the most important trigger pushing households into poverty and destitution, particularly when the person sick is the adult wage earner (Harriss, 1989 cited by Beall, 1995b) is male. This raises questions as to who in a household gets access to healthcare when user charges are imposed. This may disadvantage girls and women and privilege boys and men in low-income households.(Beall, 1995b)

Indoor air pollution and airborne lead have been identified as among the most serious pollution problems in developing countries. Women and children spend more time at home than men do, and more exposed to indoor pollution, and hardest hit by respiratory disease (Surjadi and McGranahan, 1995). Although women are more exposed to air pollution from household fuels and to

contaminated water, there has been little research on the different health consequences of pollution for women and men (UN, 1995).

Men and women play different roles in the environmental management in cities. Research in Latin America indicates that poor women are more likely than men to undertake the majority of environmental management tasks such as purification of water and management of domestic waste (Paolisso and Gammage, 1996).

9.3.5 Housing

Lack of access to secure and safe housing is a central feature of urban poverty. At least 600 million urban dwellers in Africa, Asia and Latin America live in housing that is so overcrowded and of such poor quality with such inadequate provision for water, sanitation, drainage and garbage collection that their lives and their health is continually at risk (UNCHS). Housing is also an important productive asset since access to credit to secure a livelihood may depend property ownership. The price and availability of land for housing remains an important influence on housing prices and conditions leading to the development of illegal or informal land markets, where the poor have limited capacity to pay. Quantity, quality, accessibility and tenure of housing are all important and have gender-specific dimensions.

There is increased awareness of possible 'gender blindness' in housing and basic service programmes, because they do not recognise and make provision for the particular needs and priorities of women for income-earning, child-rearing and household management, and community-level action and management. Low-cost housing or site and service programmes rarely consider the needs and priorities of women in terms of site design and nature of infrastructure and service provision that meet their needs. The ways and means in which discrimination takes place is well documented i.e. exclusion of women through eligibility criteria, methods of beneficiary recruitment, cost recovery mechanisms (Moser and Peake, 1987: Moser and Chant, 1985).

There are also **gender dimensions to renting and gender-related constraints to owner-occupation.** Studies of Latin America and West Africa suggest that female-headed households are more likely to be tenants or sharers than owners, whilst a study in Bangladesh found that female-headed households and supported households were concentrated in the poorest and potentially most vulnerable housing conditions. There are several reasons for this:

- women are often excluded from official housing programmes offering owner occupation;
- female-headed households tend to be poorer and since poorer households frequently rent, women tend to be tenants;
- female-headed households also frequently lack both time and skills to self-build, but are often required to do so in the absence of funds for professional labour (*ibid*).

However, the tendency to portray women as victims is questionable in light of women's involvement in low-income housing as landlords and illegal developers of urban land. Research on Mexican cities highlights women's direct role in self-help housing construction directly, and their crucial role in underpinning the social relations on which much of the mutually supportive activity of self-help housing construction rests (Varley, 1995).

9.3.6 Transport, public infrastructure and basic services[23]

There has been a decline in investment in urban infrastructure such as transport, sanitation, water provision in many developing country cities. Official statistics suggest that by the early 1990s more than 80 percent of the urban population in Africa, Asia and Latin America were 'adequately served' with water, at least a third have no proper sanitation, and three-fifths were not connected to a public sewerage system (Satterthwaite, 1995b). Governments tend to exaggerate the proportion of people with piped water, and there is much disagreement about the definition of 'adequate'. Inadequate supply of water and sanitation facilities may place time constraints on women, as they are more likely to have the responsibility for tasks that require water.

When planning transport there is no consideration of that fact that women also have to perform reproductive tasks. Women may be severely disadvantaged by the fact that transport often runs infrequently during off-peak periods (Schmink, 1982 cited by Chant, 1989).

[23] See also Masika with Baden, 1997.

9.4 GENDER , URBAN POLICY INTERVENTIONS AND STRATEGIES

There are relatively few examples given of successful anti-poverty policies in urban areas in the development literature. This may be attributed to the fact that most of the work on urban issues has been carried out by geographers, receiving less attention from economists. The increasing sociological and anthropological work on urban issues particularly in Latin America may bring about some change.

One area of urban anti-poverty policy that has witnessed much theoretical and empirical work, and considerable success in benefiting the poor is slum improvement and basic services provision (Lipton, 1996). But even such initiatives have tended to be biased towards the non-poor.

A significant change during the 1980s and 1990s is the shift **from housing needs to housing rights** as a result of increasing influence on government actions of international and national law on people's right to housing, largely as a result of much greater use of international and national law by NGOs. Various new approaches to settlements planning and management have been developed over the last 10-15 years in the form of settlement planning, land use control (improved zoning techniques, innovations in land development and management), the management of infrastructure (management of environmental infrastructure, financing investments, paying for water) and transport planning and management (UNCHS, 1996).

In recent years, there have been initiatives to reduce discrimination and ensuring a greater voice and influence for women's needs and priorities in housing, and more generally human settlements. However, the tendency has been to focus on women's need for income generation rather than their housing needs. It is now more common to find discussions of women's livelihood and housing needs together. Some credit programmes that developed for income generation have also developed credit programmes for housing purchase, construction and improvement e.g. the Grameen Bank.

Increasing attention is being given to **urban employment creation**. The new emphasis on self-employment promotion corresponds with changing views on the informal sector. There is also much interest in micro-enterprise sector development in the context of priorities emerging in liberalising economies such as developing the private sector, creating employment, alleviating poverty and encouraging more equitable income distribution (Kruse, 1997).

The **health sector**, perhaps more than any other, targets women in urban areas. But this has not always meant it has addressed women's health needs and rights. Health care remains highly medicalised and professionalised, and poor men and women continue to be excluded from formal or public health care. **Cost recovery approaches** to financing health services have gendered implications for affordability. A gendered approach which addresses simultaneously and equitably the different preventative and curative health needs of both men and women is required.

The limitations of supply based, top down responses (as epitomised by infrastructure and low income shelter programmes) has led to various conclusions about what may improve urban conditions. The failure of large scale infrastructure based projects to provide **sustainable action** has been interpreted in different ways. A range of alternative approaches have been taken particularly by NGOs:

- institutional support; greater use of low cost technology in infrastructure responses (e.g. ITDG smokeless stoves);

- integrated programmes of health, education, shelter and infrastructure support; basic needs support targeted at the poor;

- radical programmes based on community needs and community involvement; involving NGOs more in these community based responses, as an alternative to government/municipality agencies support (Jones, 1996; Hart 1996).

The role of women at grassroots or community level is also becoming better appreciated by external agencies. Several case studies suggest that **community organisations** in which women have a major role are more effective than those controlled by men e.g. the Integrated Slum Improvement Programme in Visakhpatnam (India), it is in the few examples of settlements that are led by women that the rhetoric of urban community development has most closely been translated into reality.

Box 2: Colombia's programme for the development of families headed by women

In Colombia in 1990, a local NGO and the Women's World Bank began a credit programme targeted at female heads of household in Cali, the third largest city. Following on from the new constitution passed in 1990 and after the 1991 elections, the Presidential Programme for women, Youth and the Elderly decided to take up this programme and make it national and permanent, in part to address one of the articles of the new constitution that prescribed special support for women-headed households.

In 1992, the programme was launched in five cities and in 1993 in a further ten, covering 2,750 households. It was supported by many institutions, both governmental and non-governmental. The programme was seen as an effective way of institutionalizing gender-aware policy and in the context of decentralization, of involving local-level institutions.

The objective of the programme was to improve the quality of life of families headed by women at the lowest socio-economic level in urban areas through the improvement of income generation, household well-being, the condition of children and the promotion of human development of women and their families. The target group is urban women heads of households working in the informal economy in their own small enterprises. The programme includes credit schemes, management training, promotion and support for person development including training in self esteem, health care, legal education and family life (Beall, 1993, cited by UNCHS, 1996).

There are examples of women's housing projects, or housing projects that address the particular needs of women or women-headed households. Box 2 gives an example of a programme that was developed in Colombia.

Community activism is an important avenue towards participation in city-level planning and policy making processes. But, there is the danger that if women confine themselves to organising self-help and survival strategies. They will be left to manage communities on their own, without resources or political and professional support (Beall, 1995a).

Recent concern with **urban governance** stems from general attention being paid to the issue of 'good governance' in development. It is essentially preoccupied with questions of financial accountability and administrative efficiency, and political concerns related to democracy, human rights, and participation. Urban governance used to be equated solely with urban management but more recently, it has come to be understood both as government responsibility and civic engagement involving a full range of participants, which makes it more possible to integrate a gender perspective.

Women need to participate in public office because they have particular experiences of, and relationships to, the urban environment, and they have proved themselves to be effective agents of change at the city or local level on a range of issues (Beall, 1995a).

9.5 FUTURE DIRECTIONS

Poverty analysis must focus on a household's means of survival and its room for manoeuvre in adopting different coping strategies. This necessarily involves a discussion of household composition and gender relations. Such an analysis must go beyond a solely income-based view of poverty and include an understanding of vulnerability, entitlement and social exclusion which emphasise the importance of assets, and processes of exclusion.

The role of **governance, institutions and partnerships** with individuals, households, communities, voluntary organisation, NGOs, private enterprises, investors and government agencies is continuously emphasised in the urban development literature. There is a need to develop gender sensitive mechanisms and ways to involve both men and women in the processes of identifying needs and planning. To address the scale and complex nature of urban poverty problems, national and local capacity building institutions will need to be strengthened, ensuring that training is in local languages, gender-sensitive and involves all actors.

New forms of urban partnership are required, to develop participatory processes that include women and men at all stages of urban development. **Participation as entitlement** refers to how women and men command resources, contribute to, and take responsibility for the well-being of their households, communities and the city. **Participation as empowerment**, relates to processes by which organised groups in cities (and individuals within them) identify and articulate their interests, negotiate change with others, and transform urban organisation life and their role within it (Beall, 1995a) More research required on women, citizenship, democratisation and decentralisation and its relationship with urban governance. To date the role of women in local municipal government is one of the few areas addressed.

Environmental sustainability issues are very important. More research required into how gender relations intersect with urban environment and poverty issues in the context of urban development.

Another area requiring some research is social unrest and violence, a continuum that begins within the household and reaches beyond as it becomes a community and city-wide problem (Moser, 1995).

A review of **research agendas relating to gender and urban issues** shows that much of it has had little influence on mainstream urban researchers and policy makers. Most of this research remains a specialist concern undertaken by women in separate departments or work areas thus marginalising their work. A major priority is the mainstreaming of this work.

Gender, education and poverty

By Zoë Oxaal with Chris Colclough

ACRONYMS

GER	Gross Enrolment Rate
GNP	Gross National Product
CPM	Capability Poverty Measure
CAMFED	Cambridge Female Education Trust

10.1 DEBATES ON EDUCATION AND POVERTY

10.1.1 Education and development

Much of the theoretical debate about the role of education in development and economic growth has focused upon whether education is productive in an economic sense. There is much evidence that levels of schooling amongst the population are highly correlated with levels of economic development. But whether the former has helped cause the latter, or whether causality runs from income growth to educational expansion, remains open to debate.

Human Capital Theory (associated with the work of Gary Becker, Mark Blaug and many others), asserts that education creates skills which facilitate higher levels of productivity amongst those who possess them in comparison with those who do not. Education, then, is costly but it brings associated benefits which can be compared with its costs in much the same way as happens with any investment project.

Human capital theorists use proxy evidence of various kinds to support the above assertions. First, there is a strong, and empirically verifiable, positive relationship across all societies between the wages and salaries people receive at work and the level of education which they have received. Using the 'normal' assumptions of competitive labour and goods markets, it follows that those with higher levels of education seem to have, on average, higher levels of productivity. Employers use educational characteristics as a proxy for the suitability, and potential productivity, of their employees.

Second, the earnings by age of the more educated not only start at a higher level, but increase more rapidly to a peak - which happens later in life - than is the case with the earnings profiles of the less educated. Indeed, those with no education tend to have earnings profiles which remain pretty flat throughout their lives. These patterns are said to indicate not just that education makes people more productive but also that it enhances the ability to learn-by-doing, causing productivity, and thus earnings, to increase at a faster rate than for those with less education. The fact, however, that the profiles peak and then decline beyond a certain age suggests that the skills created by education are prone to obsolescence and that their productive value declines when technology has outpaced them.

Although few people contest the strength and near universality of the above relationships, whether or not they necessarily imply that education is itself a source of enhanced individual productivity remains contested. Early criticisms of Human Capital Theory came from a group of radical economists (Bowles, Gintis and others, sometimes referred to 'Correspondence Theorists') who argued that education was valued by employers not because of the cognitive skills which it engendered, but because of the non-cognitive qualities and attributes inculcated at different levels of the education system. These theorists argue that the non-cognitive traits encouraged by each level of the school system correspond strongly to the attributes required of employees at unskilled, middle and higher levels of the occupational hierarchy. Education was thus judged to be responsible for reproducing the social hierarchies in society in a stable and predictable way, rather more than enhancing the productive capacities of labour.

A further set of theories associated with the 'screening' theorists (Wiles, Whitehead and others), asserts that education is merely an attenuated selection process, whereby the most talented people are distinguished from the less talented. In other words, schooling identifies the most able people but does nothing, itself, to create or enhance those abilities, or by implication, individual productivity. In this view if ranking procedures were efficient, the benefits of ten years schooling could be short-circuited by

aptitude tests which might last a matter of days rather than years. This group of theorists argue that the associations between education and earnings adduced by human capital theorists to imply that education has productive value, can be shown to be entirely consistent with its negation.

10.1.2 Education and poverty

Much of the above debate is set against the backdrop of the formal economy - a world in which people are hired into an occupational hierarchy and progress within it according to their skills and abilities. An extremely important context however for a discussion of poverty is that part of production which takes place outside the formal sector, much of which is characterised by self-employment in rural and peri-urban areas. There has therefore been much interest in examining the extent to which education affects production patterns in those activities. It has been shown that primary schooling, for example, helps to increase the productivity of peasant farmers, particularly when they have access to the other inputs needed to enhance their production. It has been shown also that the earnings of the self-employed, including those in urban and informal sector activities, are higher for the educated than for the uneducated. Furthermore, it has been demonstrated that increasing the schooling of women brings beneficial effects for their own control of fertility, for their own health, and that of their families.

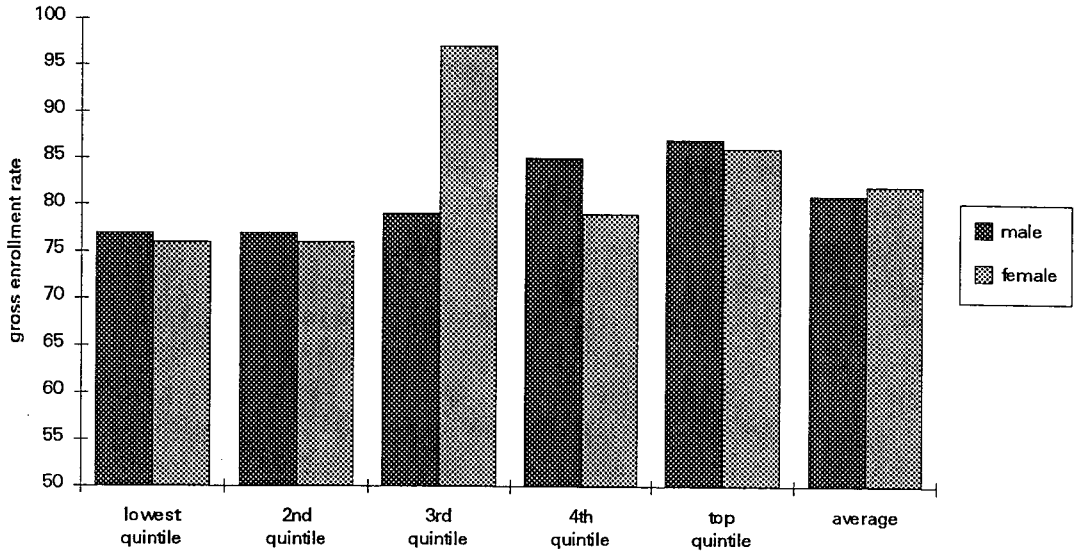
Thus Human Capital Theory and in a different sense Correspondence Theory both provide a set of implications for policies to alleviate poverty. Broadly speaking, the former implies that an effective anti-poverty strategy should incorporate the enhancement of education and skills amongst poor households. This will enhance their productivity in the informal urban and rural economy, and it will also increase their eligibility for paid employment in the formal sector and for advancement once they are employed. Correspondence Theory similarly implies that increasing levels of schooling in the labour force are likely to be functional to the process of employment growth. However it does not necessarily imply a benign impact for those school leavers who fail to secure access to the formal sector.[24]

Human Capital Theory draws links between education and poverty in terms of education as a means of poverty reduction, another significant linkage runs the other way - i.e. the effect of macro and micro level poverty on levels of education. At the macro level, it is generally the case that levels of enrolment correlate with GNP. Countries with low per capita incomes tend to have low enrolment ratios. However there are a number of exceptions to this rule. In Africa, for example, extremely poor countries such as Lesotho, Madagascar and Togo have primary gross enrolment ratios in excess of 100 (Colclough, 1994). Among poor countries there is considerable variation, showing that low GNP does not necessarily translate into low levels of educational enrolment.

At the household level evidence suggests that children of poorer households are generally likely to receive less education. Data from Tanzania shows that at primary level enrolments rise with income group, with the primary Gross Enrolment Rate (GER) 77 percent among households in the lowest expenditure quintile, which is 6 percent lower than average and nearly 12 percent below enrolment rates among the wealthiest quintile (see Chart 1). More pronounced disparities between enrolment rates exist at secondary level. Secondary GERs among boys in the lowest quintile are only 27 percent of the boys' average rates and just 13 percent of the rates among boys in the wealthiest quintile (see Chart 2). For girls, GERs among girls in the poorest quintile are only 25 percent of average rates for girls, and 12 percent of those girls in the wealthiest quintile.

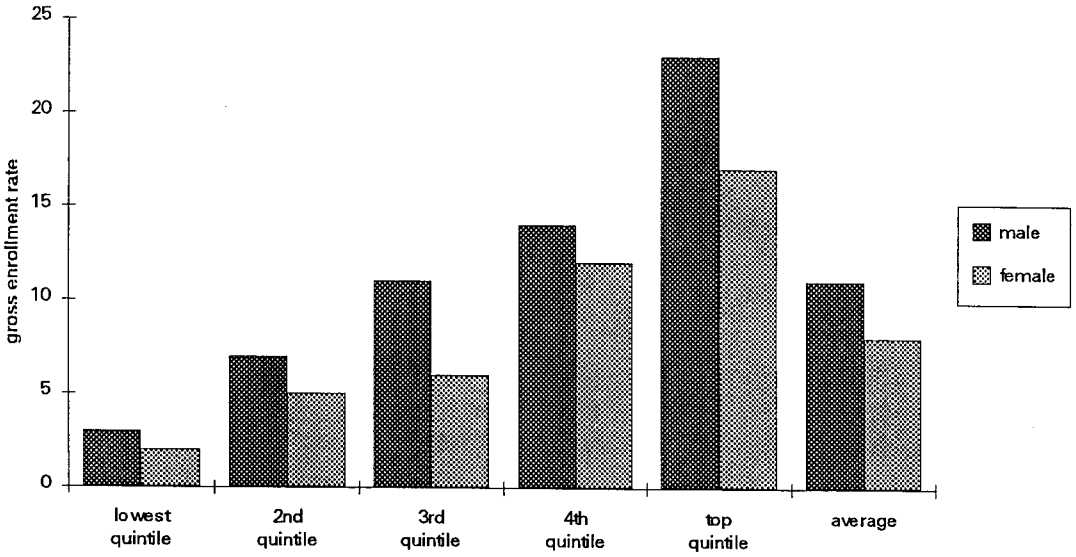
[24]If, on the other hand, screening theorists were right, schooling could be expected to have no impact whatsoever upon the incidence of aggregate poverty. It would merely affect the determination of who in society is poor, and thus the distribution of poverty rather than its extent and intensity.

Chart 1. Primary gross enrolment rates in Tanzania, by quintile, 1993



Source: Mason and Khandker, 1996

Chart 2. Secondary gross enrolment rates in Tanzania, by quintile, 1993



Source: Mason and Khandker, 1996

It is at secondary level that a gender gap in enrolments emerges. Girls' and boys' enrolments are nearly equal at the start of lower secondary school, but by the upper secondary level only 25 percent of students are female. Given the low level of secondary enrolment amongst the poorest quintile, and the gender gap at that level, it is clear that gender and poverty combine to produce highly significant educational disadvantage for girls in poor households (this is explored further in section 4).

The direction of causality between poverty and education linkages has been shown to flow both ways. On one hand poverty acts as a factor preventing people from getting access to education. On the other hand those with education are considered to be at less risk of poverty. Appleton (1997) states that each

year of primary schooling is associated with a 2.5 percent fall in the risk of poverty, and that lower secondary schooling has roughly twice this effect. Overall, the effects of education on the probability of being poor were found to be very strong (*ibid.*).

Education, capability and poverty

Recent debates on poverty have highlighted the need to expand understanding (and measurement) of poverty beyond household income/consumption figures. This is demonstrated by the introduction in the 1996 Human Development Report of the Capability Poverty Measure (CPM) which includes female education (in the form of female literacy levels) as part of a composite poverty measurement. In this context, education is seen not just an 'input' to poverty reduction (in the sense of increasing productivity and incomes) but as an asset which can be realised in terms of 'entitlements' (e.g. to labour, capital, social welfare support).

10.1.3 Education in policy debates on poverty

The policy conclusions of the Human Capital approach are reflected in the World Bank approach to poverty reduction, which strongly emphasises basic services provision (education and health) to the poor. The World Bank is the largest single source of external funding for education in developing countries. Its agenda on gender, poverty and education is thus influential and the World Bank approach can be characterised as essentially grounded in the orthodox Human Capital Theory outlined above. The Bank states that its projects will pay greater attention to equity, especially for girls, disadvantaged ethnic minorities and the poor. They state:

> Education-especially basic (primary and lower-secondary) education helps reduce poverty by increasing the productivity of the poor, by reducing fertility and improving health, and by equipping people with the skills they need to participate fully in economy and society." (World Bank, 1995 p.1)

Equity is cited as one of the major challenges facing educational development. It is taken to refer to disadvantaged groups including the poor, linguistic and ethnic minority groups, nomads, refugees, street and working children as well as gender. The World Bank argues that public spending on education is often inequitable, when qualified potential students are unable to enrol in institutions because educational institutions are lacking or because inability to pay (World Bank, 1995). Alongside this equity focus are efficiency arguments for World Bank championing investment in education, particularly for girls. It is calculated that there are high rates of return for basic education in most developing countries and this strongly suggests that investments to improve enrolments and retention in basic education should generally have the highest priority in countries that have not achieved universal basic education.

The aim of poverty reduction through investment in education raises issues of financing and the affordability of education for the poor. Analysis of the supply side of educational provision is important to equity considerations because the proportions of government financing of the different levels of education systems have implications for gender equality and poverty-reduction objectives. The World Bank asserts that public spending on primary education generally favours the poor, but public spending on education policy as a whole often favours the affluent because of the heavy subsidisation of the upper-secondary and higher levels of education.[25] It is pointed out that higher education students

[25] Benefit incidence analysis of public social spending on education can be used to reveal the extent to which different groups (e.g. the poor, women/girls) benefit from subsidies to public services. Such an analysis of government spending on education in Côte d'Ivoire shows that the poorest groups do not benefit proportionally from public subsidy. The

come disproportionately from richer families and therefore public sector spending for higher education is particularly inequitable (World Bank, 1995). Female students are typically even more underrepresented at higher levels of education and thus subsidy of higher education at the expense of lower levels double disadvantages poorer females.[26]

The direct costs of schooling act as a constraint to education in poorer households and financing mechanisms such as user fees have a significant impact on access. Colclough (1996) states that the incidence of absolute declines in enrolments following increases in tuition fees provides compelling evidence for regressive outcomes as is shown in the case of Malawi (see Box 1. below).

Box 1. The impact of user fees in Malawi

In Malawi, when primary school fees were introduced in 1982 enrolments declined initially, and then grew at a much slower rate than previously. When, in 1994, the new democratic government of Malawi removed fees for primary schooling there was immediately a huge increase in enrolments with numbers in primary school increasing from 1.9 million to 3 million during the year. Fees are a significant expense for family budgets, and reductions can have a big impact on enrolments, particularly among poorer households.

Source: Colclough, 1996

For poorer households, the payment of user charges has a negative income effect which may adversely affect household ability to meet their other basic needs. Evidence of the importance of this income effect is seen in the steep fall in enrolment ratios during recession and adjustment In Tanzania 1980-86, during a period of steep economic decline during which fees remained the same the gross enrolment ratio fell from 93 to 69 percent (Colclough, 1996).

poorest quintile gained under 14 percent of total education subsidy, in contrast with 35 percent going to the richest quintile (Demery, 1996).

[26]However this emphasis on basic educational investment, and away from funding for higher education is controversial because of its implications for undermining intellectual development in the South.

10.2 GENDER IN THE MAINSTREAM DEBATE ON EDUCATION AND POVERTY

10.2.1 Investment in female education

The World Bank has stressed investment in female education as an important development strategy for developing countries and this strategy is broadly agreed across a range of agencies and, increasingly, governments. In particular the World Bank has stressed the high **social rates of return** to female education. It is widely claimed that educated women marry later, want fewer children and are more likely to use effective methods of contraception. Large differences in fertility rates are found between those who have completed at least seven years of education and women who have not completed primary education (UN, 1995).[27] The more educated the mother, the lower is maternal mortality and the healthier is the child (World Bank, 1995). It is calculated that child mortality falls by about eight per cent for each additional year of parental schooling for at least the first eight to ten years of schooling. This is explained through the use of medical services and improved household health behaviour, resulting from attitudinal changes and ability to afford better nutrition and health services. The benefit-cost ratio of health and fertility externalities are estimated for Pakistan, for example, as 3:1 (World Bank, 1995). Furthermore it is stated that education increases economic productivity.

Although the World Bank and others have accepted the argument that investment in female education pays off through higher social benefits, this calculation has been contested. Berhman (1991) states that the externalities to female education are not as great as is often claimed and are actually realised as private benefits. Furthermore, he argues that child health and welfare and fertility reduction might be gained in a more cost-effective way by spending directly on child health and family planning rather than on female education (Baden and Green, 1994).

The literature on capabilities and entitlements also suggests that women experience greater barriers than men in translating capabilities into entitlements, not just into the labour market (as rates of return are conventionally measured) but also in other markets and public institutions.

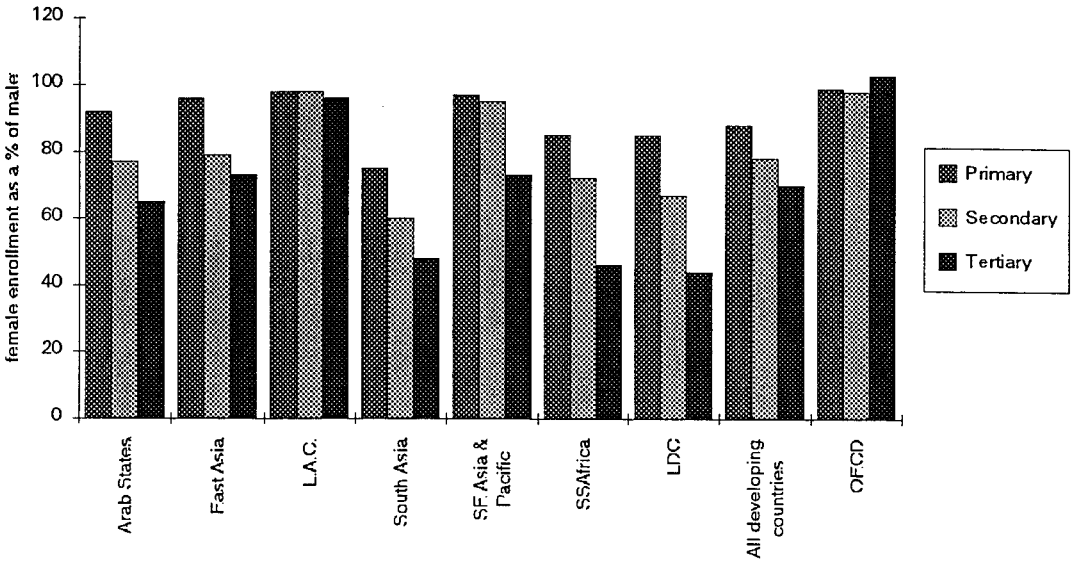
[27]The effects of men's education on family decision making and family size have been studied less.

10.3. WHY A GENDER PERSPECTIVE IS IMPORTANT

10.3.1 Gender gaps in education

Girls' primary, secondary and tertiary school enrolment has been maintained or increased in most countries since 1970. Women's literacy increased from 54 percent of the male rate in 1970 to 74 per cent in 1990. However females educational opportunity remains significantly lower than males and the gap is particularly marked in the poorest countries (see Chart 3).

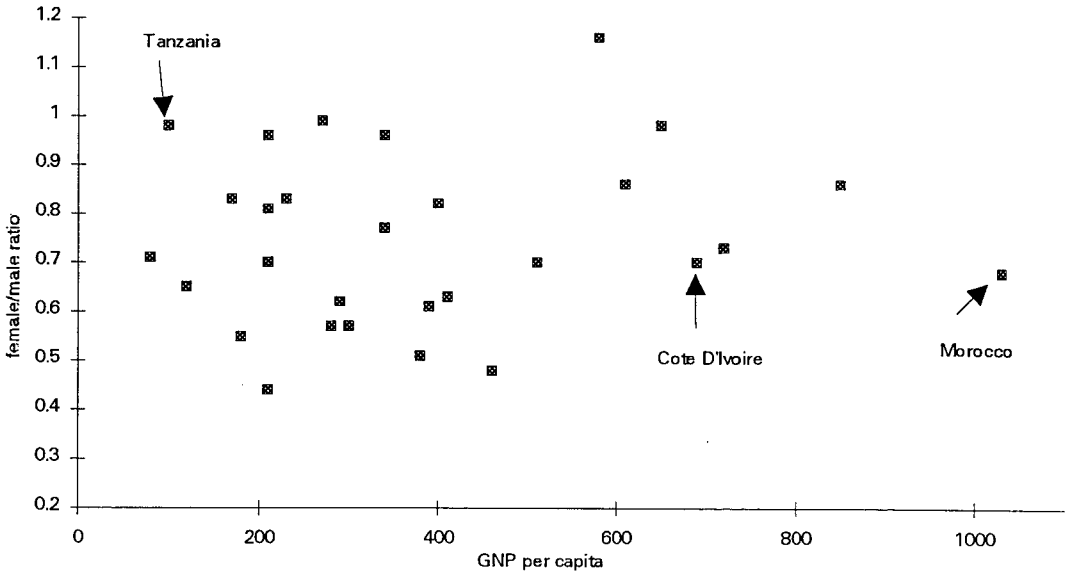
Chart 3. Female enrolments as a percentage of male, by region, 1990



Source: Human Development Report, 1995

Although it is generally true that countries with high GNP have greater educational equality for males and females (as shown in Chart 3), amongst poor countries there is considerable variation in female/male ratios. Graph 1 shows that among African countries there is no clear relationship between GNP and gender equality in enrolment. For example, Tanzania with a GNP per capita of US $100 has a female/male ratio of 0.98, whilst Morocco with a much higher GNP per capita of US $1030 has a female/male ratio of only 0.68. The figures for Côte D'Ivoire are US $690 and 0.7 respectively. Female disadvantage in enrolment is thus not simply a function of low levels of development. Factors such as social and cultural attitudes, and policy priorities are clearly also significant.

Graph 1. GNP per capita 1991 ($) and female/male primary gross enrolment ratio in African countries[28]



Source: Colclough, 1994

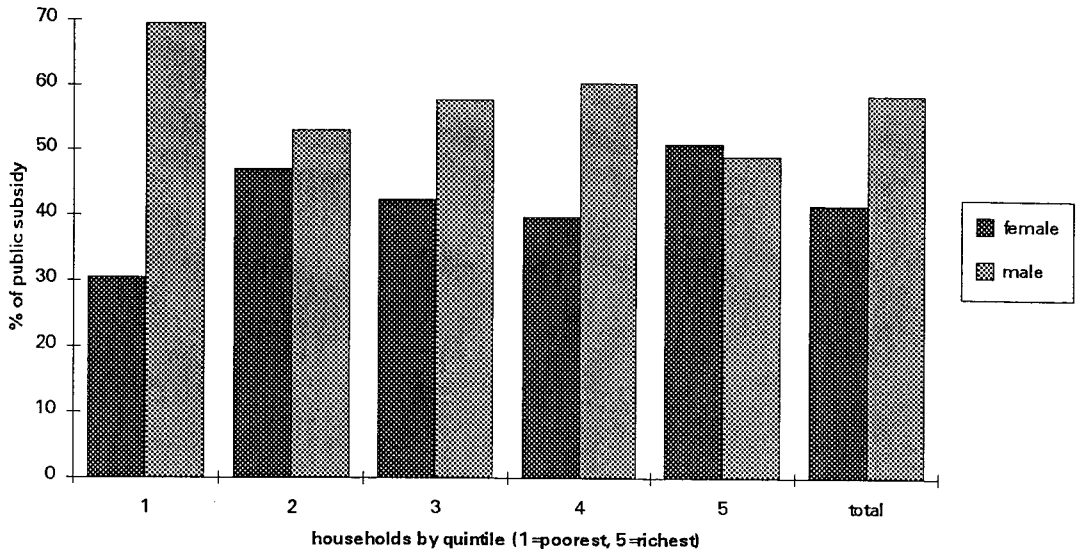
Analysis is required to explain these persistent gender gaps and to formulate solutions for more equitable education. Macro-level analysis of the effects of national investment in education on poverty, and of the social returns to female education, needs to be accompanied by an analysis (at micro- and meso- levels) of how household poverty and other institutional biases lead to gender inequity in educational outcomes.

In many regions in the developing world, gender gaps have narrowed, but the extent and explanation of this narrowing varies between and within countries and regions. In Africa over the past decade, gender gaps are calculated to have narrowed in the context of an overall decline in enrolment. Gaps have reduced because girls' enrolments have held up more strongly than boys', so that boy's enrolment is decreasing to produce an effective levelling down. In Latin America and Asia (excluding South Asia) gaps have narrowed, because enrolments were already high and further increases necessarily required an increase in girls' enrolment as most boys were already in school. (In some countries this success has come from increasing enrolments for all but not necessarily through policies specific to girls.)

Gender disaggregated benefit incidence analysis reveals that in each quintile by income, the benefits of public spending are disproportionately distributed between males and females. Chart 4 shows that in all but the richest quintile, males benefited from a greater percentage of public subsidy for primary education. Notably, this unequal distribution was most marked among the poorest quintile, with females receiving just 30.5 percent of subsidy going to that quintile (see Chart 5). Furthermore, at secondary school level the female share of the poorest quintile's subsidy drops to 25.1 percent.

[28]Data for most recent yearavailable since 1985

Chart 4. Côte D'Ivoire: Gender distribution of public spending on primary education, by quintile, 1995



Source: Demery, 1996

10.3.2 Demand for education: poverty and gender

Research into the constraints to girls schooling explains the persistence of gender gaps. Girls in poor households are particularly likely to miss out on schooling because of the perceived and actual costs to households of girls' schooling. These costs are both direct (e.g. fees, books, pencils, paper, required clothing, transport) and opportunity costs. For example, data from Morocco reveals that reasons for non-attendance differ by gender, and that poverty was more likely to be a constraint for girls. Poverty was found to be a reason for non-attendance for 15.8 per cent of girls, but only 8.9 percent of boys. In the poorest expenditure group, girls were much less likely to attend school with 48.5 percent non-attendance for girls versus 22 percent of boys (World Bank, 1994 cited in Baden 1995b).

Opportunity costs

The opportunity costs of girls' schooling are high for poor households in developing countries, and often exceed the opportunity costs of boys' schooling. Opportunity costs include lost chore time and foregone earnings. Time-use studies (e.g. in Burkina Faso and Nepal) show that girls are generally required to spend more time on household chores than boys. Girls' labour is used to substitute for mothers' in work such as caring for siblings, fetching wood and water, caring for animals and pounding grain. The loss of girls' labour during school hours thus has an impact on women's ability to raise household income either through food production or wage labour (Herz *et al*, 1991).

Boys may also be required to contribute their labour although with different tasks. In Southern African pastoral societies (e.g. Namibia, Zimbabwe, Lesotho, Swaziland), boy's labour is in heavy demand, and girls outnumber boys at primary level.
For example, while girls between the ages of 13 and 15 in Bangladesh spend ten times as many hours as boys on household activities, boys spend twice as much time on crop production and five times as much time in wage work (Pitt and Rosenzweig, 1989 cited in Herz *et al*, 1991). Girls too may contribute wages earned to household survival, especially in households experiencing extreme poverty.

It is also important not to make the assumption that it is parents who make the investment in schooling their children, or that increasing household income will necessarily lead to gender equity in investment in education. Children themselves, older siblings or relatives and friends may finance children's education. For example, a study on child prostitution in Mozambique in 1993-4 found that some girls were earning money through sex work in order to pay for their own schooling, often with the tacit approval of parents (cited in Baden, 1997). In many Asian countries, daughters' earnings are used to pay for sons' education.

The costs of education to households affects both the enrolment and the drop out rates. Even when girls are attending school they are still required to help with household chores, which can hamper their achievement in school and thus their possibility of continuing in education. Unforeseen incidents such as the illness of a household member can mean that daughters are required to drop out of school.

Private rates of return

Rates of return to education are also a factor in household decisions about schooling. Girls' schooling is constrained when the real or perceived rates of returns to female education are limited or less than for males. Not only are the costs of schooling girls greater but the private returns (to the household) are often less, or perceived to be less.[29] Poor households sometimes see investing in girls education as not worthwhile as they expect daughters to leave the household upon marriage. Where tradition favours female seclusion, or women remaining within the home, the future economic returns to girls schooling are less.

The current earning capacity of women also influences expectations of how much a girl in education can expect to earn in later life. Parents see the benefits of educating boys as more tangible (Rose *et al.*, 1997). Wage differentials between educated women and men mean that the private economic rates of return to female education are generally less than for men. Major obstacles arise when women strive to education into social and economic advancement (UN, 1995).

Role models are important for developing girls' desire for education and understanding of its benefits. Girls' ambitions are often more circumscribed than boys' by socio-economic background and rural locations (Brock and Cammish, 1991). A case study in Vanuatu showed that girls in a typical rural school expressed a wish to work in a subsistence 'garden' or to be a teacher, based on the fact that the only available female role models were their mothers and their teacher. Boys however expressed a wider range of options such as mechanic, doctor, policeman, pilot etc. (*ibid.*). Schooling may reinforce female disadvantage and poverty if it fails to raise female aspirations or to encourage women/girls to enter areas of labour market demand.

Concerns for girls' safety and issues relating to puberty/sexuality

Other constraints to girls schooling include concerns about girls' safety both in school and journeying between home and school, and concerns about privacy (Herz *et al*, 1991). These physical safety concerns are further exacerbated when girls have to travel a long distance to school and/or when schools lack separate private toilet facilities for girls. In Ghana, girls' enrolment (but not boys) at primary level is deterred by a long distance to school. In Bangladesh, parents are unlikely to send daughters to school if they lack private toilet facilities. Issues concerning puberty and sexuality also

[29] Private rates of return (to the household) for female education are considered less for a number of reasons e.g. labour market discrimination which limits the wages even educated women can earn compared to men. However it is argued that social rates of return (to society) which measure the externalities such as affects on fertility and child health, are higher for female education than male.

relate to safety concerns. Parents fear that contact with boys and male teachers at school may lead to inappropriate sexual activity or to physical abuse.

For poorer households, these safety concerns may be increased due the fact that children from the poorest households are often furthest from schools, particularly at secondary level. Data from Indonesia, for example shows a direct correlation between distance and income groups, with the poorest furthest away from secondary schools, and the richest situated conveniently closer (see Table 1 below). Greater distances to school for poorer households are likely to be a greater constraint to girls' schooling than boys' given the concerns for girls' safety, particularly at puberty, as outlined above.

Table 1: Average distances to lower secondary schools in Rural Java by Expenditure Quintile, 1989 (lowest quintile = poorest households)

	Average Distance to Schools (in km.)
all rural Java	3.9
lowest quintile	4.7
second quintile	4.2
third quintile	4.0
fourth quintile	3.4
top quintile	3.2

Source: Mason, 1994

Early marriage or pregnancy is another factor reducing female education. In many countries the legal minimum age at marriage, and the actual age, are lower for females than for males. Early marriage therefore probably acts as a deterrent to female education more than male. Pregnancy also disrupts girls' schooling, and in many countries girls are automatically expelled if pregnant. The early marriage of girls links to poverty as poor households may push daughters to marry for economic reasons - to save on their upkeep, or to obtain bridewealth. As illustrated above, girls' from poor households may also be more likely to engage in sexual survival strategies to secure support for their schooling, risking pregnancy and the curtailment of the education.

10.3.3 Education for women's empowerment?

A gender perspective on education suggests attention to the content and value of what schools teach and the kind of environments they provide for girls, not just whether girls attend school or not. Girls' sense of second class citizenship may be reinforced by the school environment, where the curriculum or teacher attitudes perpetuate sexist stereotypes, or where there is a lack of female role models (Womankind, 1995). A number of factors tend to limit the value of formal schooling for girls:

For girls in poor households where the opportunity costs of schooling are particularly high, the question of the value of schooling is of pressing importance. Women and girls need the opportunity to learn both basic literacy and numeracy, and a wide range of subjects and skills which challenge stereotypes, e.g. management training, accounting, marketing and machine maintenance. Reform of existing formal education systems can go some way to address these problems. Possible measures include; gender-awareness training for teachers and pupils, sex and health education to prevent teenage pregnancy; and curriculum and textbook changes.

10.4. IMPLICATIONS FOR POLICY OF A GENDER PERSPECTIVE

The preceding analysis suggests a number of strategies for improving access and returns education for poor women. Most strategies concentrate on improving access. Focus is also required on improving educational performance, on the quality and relevance of provision, and on enabling women to realise returns to education in the marketplace.

10.4.1 Reprioritising educational expenditure

Improving overall educational provision, accessible to poor women involves reprioritising expenditure patterns in the sector, with increased allocations to basic education, but also non-formal, adult education and literacy programmes, pre-school education. Spending at higher levels should be earmarked for encouraging greater female enrolment. Public expenditure reviews should include a review of educational spending from a gender perspective and outcomes can be monitored using gender disaggregated benefit incidence analysis (Demery, 1996).

10.4.2 Increasing access to education for poor women

From a poverty perspective, strategies which reduce the direct and opportunity costs of girls' schooling are most relevant.

The **direct costs of girls' schooling** to poor households can be addressed through incentive and scholarship programmes (see Box 3 below). Experience suggests that careful formulation is needed in the targeting of such schemes to ensure it is the poor who benefit.

Strategies to increase female education by **reducing opportunity costs** may particularly benefit girls from poor households. Provision of child-care facilities is one way of increasing girls enrolments, by reducing their need to care for siblings while their parents work (see Box 2). Investment in infrastructure (e.g. water supply) outside the education sector may also be significant in increasing female enrolment (see next section).

Box 2. Reducing opportunity costs: provision of childcare facilities in Colombia and China

The expansion of day-care facilities sited in schools and workplaces can increase girls enrolments by reducing the need for them to remain at home caring for siblings to enable parents to work.

In Colombia *Hogares de Bienstar Infantil* is a community day-care programme which has freed girls and women to attend school or enter the labour market. In 1987, the first centres were established in poor neighbourhoods. Within a few years these centres were serving about 400,000 children under the age of seven. 'Community mothers' selected by local women, and trained in nutrition, health, hygiene and recreation are paid a salary to supervise children and receive assistance in obtaining home improvement loans.

In Gansu province, China, some schools allow girls to bring their younger siblings to class. This policy along with other initiatives such as the establishment of work-site day-care centres for young children of employed mothers, and the expansion of pre-schools, succeeded in achieving a target of three per cent growth in female primary enrolment and surpassed a two percent target for growth of secondary enrolments.

Sources: Herz et al, 1991; King and Hill, 1993

Box 3. Incentives for girls' schooling: Scholarship programme experience in Bangladesh, Guatemala and Zimbabwe

A number of programmes have attempted to increase girls' schooling by offering various incentives such as free uniforms or scholarships. Schemes with free clothing provided have met with problems of misappropriation. For example, a World Bank assisted project providing uniforms to girls in Bangladesh, found that girls who should have been ineligible were benefiting. Evidence from scholarship schemes looks more successful. It has been suggested that scholarship programmes suffer more from limited coverage than from inappropriate design (Tietjen, cited in Rose *et al.*, 1997).

The Bangladesh Female Education Scholarship Programme started in 1982 and including 20,000 girls in secondary school by 1988, provided subsidies for school expenses, exam fees, transportation, uniforms and books. Eligibility was based on family income and in the areas covered by the scheme female enrolments were reported to have increased from 27 per cent to 44 percent (more than double the national average). The drop out rate also fell. The scheme also had the effect of increasing primary enrolments because girls enrolled with the hope of later receiving a scholarship to continue their education.

In Guatemala, a scholarship programme for primary school girls has shown promising results. The programme was tested in an area, the Indian *altiplano*, where only 53 percent of school-age girls attended primary school and only 17 percent completed. By 1988 the families of 600 girls between the ages of seven and fifteen had received a payment of 15 *queztales* (US $4) a month for each daughter who attended at least three quarters of classes. As parents were not required to pay for tuition or fees ordinarily, the monthly payment was intended as compensation to parents for other school-related expenses and for the loss of their daughters time. The Ministry of Education reported that more than 90 per cent of scholarship girls completed the year.

In Zimbabwe, a programme organised by the Cambridge Female Education Trust (CAMFED) in three rural districts provides financial support for secondary schooling for selected girls from poor socio-economic backgrounds. The programme is reported to have achieved success at improving girls attendance and academic performance with negligible drop out (1992-94).

Sources: Rose *et al*, 1997; King and Hill, 1993

Introducing more flexible school hours and non-formal education provision is another way of reducing the opportunity costs of girls' schooling by enabling them to combine work in the household with schooling (see Box 4).

Box 4. Making schooling more flexible: Non formal education provision

More flexible community based forms of education provision, with greater community participation, flexible hours, adapted curricula and other innovations can have considerable success in increasing female enrolment and reducing drop out rates. A scheme in Pune, Maharashtra, India, held classes in the evenings between 7 and 9 p.m. when evening meals and domestic chores were completed, for greater accessibility to girls.

However it is essential to ensure that non-formal programmes of education have bridges into the formal system and do not become part of a two tier system. For example a project in Nepal, for low caste girls, held early morning classes, and succeeded in reducing drop-out. However, the subsequent enrolment of these girls into local public schools was opposed by upper caste families.

Source: Baden and Green, 1994

10.4.3 Promoting education for poor women's empowerment

There is also broad range of possibilities for educational initiatives with a gender and poverty focus outside of the schooling system. Adult literacy programmes may be valuable in reaching women who were not schooled as girls. This kind of education can be delivered in a variety of forms, not only literacy classes, but integrated with other programmes such as credit, income generating, health etc.. A focus on promoting learning for empowerment and social, economic and political involvement suggests the importance of education for legal awareness and leadership training.

Adult literacy programmes have been shown to have positive impact on women's political empowerment in their communities e.g. in Andhra Pradesh, India (see Box 5). Gaining basic literacy and numeracy increases women's confidence and self-esteem.

However, care is needed to ensure that adult education does not become a form of second best education for the poor, disguising the need to reform educational systems. There are a number of problems associated with previous adult education and literacy programmes, including:

- over-emphasis on welfare-oriented subjects such as family nutrition and child-rearing may limit training to expand women's horizons;
- scarcity of programmes for poor women in rural areas;
- requirements for women to attend classes regularly may hamper women with heavy workloads who lack time and energy;
- inadequate social infrastructure, e.g. lack of childcare or adequate public transport may prevent women from participating;
- perceptions of adult education as inferior to schooling may lead to reduced access to jobs despite suitable qualifications (Womankind, 1995)

Box 5. Literacy programmes leading to women's empowerment: Anti-Liquor agitation in Andrha Pradesh

The Akshara Deepam (Light of Literacy) campaign in Andhra Pradesh, India, in the early 1990s has been identified as the strongest catalysing force behind an anti-liquor (*arrack*) movement initiated and led entirely by poor rural women in a few villages in one district (Nellore) which subsequently spread throughout the state. The campaign was aimed not only at increasing women's literacy but also at raising women's consciousness and ability to act to improve their status. A chapter in the literacy primer described the plight of a poor woman whose husband drank all his wages at the local liquor shop. Women recognised that the story bore striking resemblance to their reality and began to question the abundant supplies of liquor available locally despite the constant shortages of food in government-controlled ration shops and lack of basic services. Liquor sales were boosted by many local employers and landlords paying men in coupons redeemable for liquor and by the state interest in liquor excise revenues. Meanwhile poor households suffered from inadequate food and resources, as well as violent abuse by drunken men. Women used a variety of tactics to reduce liquor sales, including picketing liquor shops, thereby reducing household poverty.

source: Batliwala, 1994

10.4.4 Improving returns to education

Incentives to invest in girls' education need to be tackled not just by direct subsidies, but also by improving their educational performance, the quality of schooling and the returns to educational investment in the labour market. This requires improvements in the curriculum, improved teacher training, tackling gender biases in attitudes and the curriculum and encouraging women in 'non-traditional' subjects. Complementary policies outside the education sector are also required, particularly to remove legal or other barriers to market access.

10.4.5 Non education sector strategies

A gender equality perspective draws attention to the need for non-education sector policies to reduce women's disadvantage. For example, legal reforms and enforcement of existing legal protection are significant, in areas such as justice and compensation for physical attack; laws on the employment of young children, and laws relating to age of marriage (Brock and Cammish, 1991).

The significance of sex discrimination in the labour market (and particularly wage discrimination) in limiting the benefits of female education draws attention to the need for non-education sector strategies to increase female education. Macro-economic policies which protect some sectors and penalise others may have an adverse affect if the non-protected sectors account for more female employment. Legal or regulatory barriers to women's full participation in the labour market or self-employment, or which restrict women's access to resources, perpetuate women's economic disadvantage and thus the lack of investment in their education (Herz *et al*,1991).

The high opportunity costs of girls' education in loss of household labour, underline the need for non-education sector investment. For example, in Morocco, a survey indicated that not only were non-education sector investments important for increasing enrolments, but that different kinds of investment were important for females than for males, reflecting the gendered nature of opportunity costs (see Box 2 below).

Box 6. Complementary investments to increase education in Morocco

A study in Morocco used data from the Living Standards Measurements Survey, and a 1993 literacy study to show that improved supply of school facilities in rural areas was insufficient to increase attendance and attainment, particularly of females. It was concluded that complementary investments in rural infrastructure and productive capacity are also needed. Different investments revealed striking gender-differentiated effects. It was found that investment in paved roads, rural electrification and rural water supply has a more marked impact on female than male enrolment in primary schools, whilst investing in more schools, irrigation and advanced crop technologies increases male but not female schooling.

Source: Khandker *et al*, 1994, cited in Baden 1995b

10.5. AREAS FOR FURTHER RESEARCH

- **Further analysis of benefit incidence of public expenditure on education, across different income groups, and of gender differences in expenditure patterns on education,** using data from household surveys. Analysis should suggest, at both macro and micro levels, factors which lead to increased investment in female education.

- **Specific local research on constraints to girls' schooling**: There now exists considerable understanding of what are the general constraints to girls schooling, many of which are increased by household poverty. However in order to design appropriate policies and execute effective reform it is necessary to have information specific to the country or area. Whilst the factors limiting female education are understood, the relative importance of each factor varies in different contexts.

- **Poor people's (including women's) perceptions of education and the education system**: Participatory action research into low income communities' (and particularly poor women's) perceptions of education may reveal more about constraints to schooling for poor females, and also how education can be made more useful and accessible.

- **Issues relating to sexuality, harassment, violence** and poor female attendance and performance need further research and policy advocacy.

- **Non-education sector strategies**, linked to education interventions, need to be explored further, particularly links to labour market conditions and policies

- **Evaluation of cost-effective interventions**: There is less existing on the measures for promoting female education that there is on constraints. A range of different interventions have been tried, as outlined in section four. There is now a need for careful evaluation of the effectiveness of these strategies.

- **Explanation of differential educational performance**: More research is needed to explain the causes of girls and boys different levels of achievements in schools. It can be deduced that girls educational performance is negatively affected by some of the same factors that limit girls' enrolment. An important area for future research is an assessment of the impact of the curriculum on girls' performance and what effects changing gender stereotypes has on performance outcomes.

Gender, health and poverty

By Zoë Oxaal with Sarah Cook

ACRONYMS

DALYS	Disability Adjusted Life Years
HHPH	Household Production of Health
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome
HSR	Health Sector Reform
MCH	Maternal and Child Healthcare
ORT	oral rehydration therapy
PHC	Primary Health Care
SAPs	Structural Adjustment Programmes
TBA	traditional birth attendant
UN	United Nations
WB	World Bank
WHO	World Health Organisation

11.1. MAINSTREAM DEBATES ON HEALTH AND POVERTY

11.1.2. Health and poverty

Policies to improve the health status of the poor, particularly through the provision of basic health services, have been an important focus of development policy over the past 25 years, a focus which is justified

- by the recognition that good health is an end in itself and a basic right; and
- that it is a critical determinant of factors which contribute to economic growth.[30]

The view of health or well-being as a basic right has led many governments and donors to ascribe to the goal of universal provision of some basic level of health care. In practice, however, economic retrenchment and adjustment has resulted in a stronger emphasis on the second justification - on efficiency grounds, that improving the health of the poor will raise their productivity and contribute to economic growth.

In reviewing health sector achievements, particularly in poor countries, over the past 40 years, the World Bank (1993) pointed to the uneven pace of progress in improving basic indicators such as life expectancy and child mortality, the variation in the burden of disease[31] across countries and regions, and the new health challenges posed, for example, by the spread of HIV/AIDS (*ibid.*: 1). Among the problems identified in the provision of services was *inequity,* with poor people lacking access to basic health services and receiving low-quality care (*ibid.*: 4). Government spending for health was seen to go disproportionately to the affluent in the form of free- or below cost care.

Health sector policy has generally been concerned primarily with technical solutions to the provision of health services or care. Poverty issues are addressed to the extent that policy makers focus on the delivery of basic free or low-cost services to the poor. Emphasis has been placed on public health interventions such as immunisation campaigns, which have directly benefited the poor as well as having externalities for the wider population. Another increasingly important area of policy concern, most directly affecting women's health, is the provision of MCH and reproductive-related health services, often closely linked to a country's population policy (whether pro- or anti-natalist).

The ultimate goal of health policy, however, is the production or maintenance of good health or well-being, for which health services are only one of many critical inputs. Policy makers thus need to understand the individual or household level demand for health care, and the ways in which health inputs are translated into the desired good or commodity - health - in order to determine the appropriate type and quality of services, and to design appropriate delivery mechanisms. The demand for health services depends on a range of factors at the individual / household level, including the willingness or ability to pay for services, perceptions of health status, and information about and access to the services offered. The capacity to translate health inputs into the commodity of health or well-being depends additionally on a range of environmental, social and cultural factors such as nutrition and sanitation practices.

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[30]The growing recognition of the important role of health in economic development is illustrated by the use of health measures as indicators of overall development (Berman, 1990).

[31]Measured by Disability Adjusted Life Years (DALYs) (e.g. Murray, 1993).

The focus on health as a means towards broader developmental ends, and the exploration of the wider determinants of health, have led to a greater focus on non-health interventions as important mechanisms for improving the health status of the poor and for alleviating poverty. Based on evidence that strong links exist between female education and indicators of health status, the World Bank has placed a strong emphasis on the education of girls and women as a cost-effective way to improving health (World Bank,1993:8). More generally, increasing household incomes is argued to be the most efficacious method for improving health status as 'the poor are most likely to spend additional income in ways that enhance their health' (World Bank, 1993:7).

11.1.2 Health care provision

The debates on, and policy approaches towards, health service provision have been shaped by changing global economic trends. The comprehensive primary health care focus of the 1970s, gave way to more selective interventions and a move towards cost-recovery, in the face of economic crisis, recession and adjustment of the 1980s.

Health care for the poor - Primary Health Care

The Primary Health Care (PHC) approach was developed to decentralise health provision, devolve responsibility away from professionals towards the community, and to emphasise preventive rather than curative care (Kabeer and Raikes, 1992). Following the 1978 Alma Ata Declaration, developing countries subscribed to ambitious health goals through the provision of widespread PHC services including immunisations, pre-natal and pre-school care and basic curative services. The plan was optimistic of the potential for comprehensive provision of basic services, but by the mid-1980s several weaknesses of the PHC approach had become apparent. These included an unclear definition or notion of community (McPake et al. 1993), lack of sustainability and problems with local institutions and management. Insufficient attention had been paid to micro-level or individual behaviour patterns which were essential for the success of such an agenda (Akin et al., 1986).

The response to the limitations of PHC included an adaptation of the comprehensive PHC approach towards a focus on more selective health interventions, and the achievement of universal access through decentralisation of decision-making, community financing, participation and management (McPake et al., 1993:1383) articulated in the Bamako Initiative. Launched in 1987 at a meeting of several African government leaders, and supported by UNICEF and WHO, its principal aim was to 'revitalise the public sector health care delivery system [by] strengthening district management [and] capturing some of the resources the people themselves are spending on health' (UNICEF 1992 in World Bank, 1993:159).

Health sector reform

The 1980s also saw governments cutting social sector budgets in response to economic crisis and as part of adjustment packages, with serious implications for health service provision and more generally for the health status of certain sectors of the population, particularly the poor and 'vulnerable' groups (Cornia *et al.*, 1987).

The widespread response to adjustment and public sector retrenchment has been health sector reform along the principles laid out in the World Development Report, 1993. Health sector reform refers to a package of policies for the financing and provision of services, emphasising cost-effectiveness through the provision of relatively low-cost, high-impact interventions, such as public health programmes, increasing efficiency through competition between providers and greater private sector provision, and the introduction of cost-recovery mechanisms such as user fees, pre-payment and insurance (World Bank, 1993; Cassels, 1995). Against the background of economic crisis, the objective of universal coverage was retained in principle, to be achieved by 'making more efficient use of available resources through institutional reforms and widening the range of financing options and institutional players who provide health care' (Standing, 1997).

11.1.3 The demand for health care

The pursuit of health sector reform has stimulated debate about the impact on the poor, particularly of the introduction of cost-recovery mechanisms such as user fees (Standing, 1997). The success of any reforms in provision and financing, and their ultimate health outcomes, are dependent on how price changes and alternative pricing systems affect the utilisation of services among different population groups. This information is obtained through studies of the demand for health care.

The results of such studies have been mixed (Bitran, 1988:6). Early studies found that prices charged by providers have an unimportant effect on the choice of provider and the amount of care consumed (Akin, 1985). Such evidence that prices are not important determinants of demand provides a justification for the widespread introduction of user fees. One explanation given for this finding is the idea that health care is valued as a commodity if it has a price. When it is provided free of charge, it may be regarded as of inferior quality and not valued. Thus poor households may demand more services if there is some price attached. Secondly, price may not be the main constraint on utilisation - even with free or low cost services, other factors prevent utilisation such as indirect costs of transport, or the opportunity costs of time. Thirdly, perceptions about ill-health, and thus the perceived need for health care, may vary by income group with the poor less likely to seek care. These arguments raise the possibility that untargetted subsidies which lower the cost of health care disproportionately benefit higher income groups who use services more than the poor (Akin, 1986).

By contrast, Gertler et al. (1986) suggest that fees may indeed have an important effect on demand, and that the poor are more adversely affected by prices than people with higher incomes and wealth. More recent evidence also suggests that the introduction of user fees for health services has led to falls in utilisation rates, temporary for some groups, but with long-term implications for the rural poor (e.g. Waddington and Enyimayew, 1989). In addition, exemption systems designed to protect the poor have not functioned effectively (Hamner *et al.* 1996: 6.19)

11.1.4 The household production of health

A more recent body of economic literature explores how health is produced within the household. Berman *et al.* (1990) defines the household production of health (HHPH) as 'a dynamic behavioural process through which households combine their (internal) knowledge, resources and behavioural norms and patterns with available (external) technologies, services, information and skills to restore, maintain and promote the health of their members'. The focus thus shifts from the public sector to the domestic domain or household, (*ibid.*) and from the provision of services and technology to the behavioural relationships which determine the effectiveness of the technologies (Da Vanzo and Gertler, 1990).

Such an approach challenges the common use by researchers and policy makers of the household as the appropriate unit of analysis, and focuses attention on the allocation of resources within the household along dimensions such as age and sex (Piwoz and Viteri, 1985). It also highlights the role of women, particularly their time inputs, in the process of health production and maintenance (Leslie, 1992). Finally, by examining a wider set of factors which determine health outcomes, it provides greater potential for moving towards an understanding of the complex interactions between health/well-being and poverty.

11.2. HOW MAINSTREAM HEALTH AND POVERTY DEBATES HAVE ADDRESSED GENDER EQUALITY

11.2.1 Approaches to women and gender in health care

Two different approaches to gender in relation to health care can be distinguished:

• *women's health needs*: this approach is concerned with the implications for women of differences in the epidemiological profile between the sexes. It highlights the specific health needs of women and girls as a consequence particularly (although not exclusively) of the biology of reproduction.

• *gender equality*: this approach to health is concerned with the role of gender relations in the production of vulnerability to ill health or disadvantage within health care systems, and particularly the conditions which promote inequality between the sexes in relation to access and utilisation of services (Standing, 1997).

Of these two approaches it is the women's health approach which has been most widely adopted in mainstream debate and in international agencies. Standing (*ibid.*) identifies two broad stances which derive from this approach. The first advocates the need for specific women-focused health interventions as a basic right. The second stresses the cost-effectiveness of interventions targeted at women and girls, particularly as a means to improve infant health. This overlaps with poverty reduction agenda where women have increasingly become seen as the most effective conduit to improving household and child welfare. Examples of this approach are the World Bank's 1994 **New Agenda for Women's Health** and Nutrition', and WHO's Position Paper **Women's Health** 1995.

The prominence of the rationale of improving infant welfare through improving women's health has led to a focus on women as mothers, and the provision of MCH services. The recent high profile given to the issue of maternal mortality on the international health agenda, exemplifies this tendency to have one eye on women's health and the other on the benefits for children. Emphasising the synergies between maternal and infant welfare, and the subsequent cost-effectiveness of maternal health interventions may be useful in persuading governments to invest in women's health. However, the assumption that what is good for women's health is necessarily beneficial for children's health and vice versa may be too simplistic and lead to mistaken assumptions.[32]

A focus on women's reproductive health runs the danger of neglecting women's (and men's) non-reproductive health problems and care needs. To some extent mainstream debate has taken this on board, for example by placing violence against women onto the health agenda, and the adoption of a life cycle approach encompassing infancy, childhood and adolescence, and problems of ageing in the post-reproductive years (World Bank, 1994). How far these concerns are reflected in the allocation of funds for research and services is another matter. The concentration on reproductive issues in the mainstream discourse on women's health needs in developing countries has important implications for health policy and planning, especially at a time when due to crisis and adjustment, comprehensive primary health care is being challenged and the emphasis is shifting to selective programmes (Lewis and Kieffer, 1994). Lewis and Kieffer argue for the adoption of a definition of 'safe womanhood' which would encompass the already well accepted notion of 'safe motherhood' and include much more besides (*ibid.*). The range of essential services to women's health proposed by the World Bank, shows an almost exclusive focus on reproductive health. The World Bank propose that

[32]e.g. it has been inferred from evidence that close birth spacing has a negative impact on infant health that close spacing is also harmful to women's health, but research does not exist to prove this (Oxaal with Baden, 1996).

governments of even the poorest countries should fund these and that private sources should finance expanded services which meet a broader range of needs. For poor women (and men) this may translate to a lack of accessible services for non-reproductive health needs.

11.2.2 Poverty and the women's health needs approach

A focus on poverty in women's health provides an opportunity to broaden the idea of what constitute women's health needs away from the current focus on reproductive health. Thinking about women and poverty can draw attention to health problems arising from the wide scope of women's activities and how gendered patterns of disease and health risk are affected by socioeconomic position. However it is important to recognise that women's health problems and access to health care are affected not only by poverty, but also by gender inequality. Even women in less poor households may not place priority on meeting their own health needs. There is recognition in the mainstream debate that poverty can not explain all the health problems of women. According to WHO, the correlation between poverty and poor health for women is not a direct one.

> Economic growth does not necessarily guarantee better health or higher status for all women because the benefits are not equally distributed. . .A deteriorating economic situation can create severe health risks for women even when they do not live in extreme poverty (WHO 1995).

Attention must also paid to ensure that health sector strategies do not put extra-heavy burdens on poor women. For example, Kabeer and Raikes (1992) point out that intensive breast feeding strategies place heavy demands especially on poor women. Furthermore, reform of the health sector impacts on women's poverty by reducing women's employment in the health sector. The viability of PHC often depends upon female health workers who are given the task of supporting and working with the community and are frequently under-resourced. The reliance on women's unpaid care work in the household puts further strain on poor women.

Mainstream debate has increasingly emphasised the benefits of women's participation in health programmes (World Bank, 1994). Well-executed participatory initiatives can be valuable for identifying women's perspectives on their own health needs and may highlight how poverty and gender interact. Participatory approaches to training health workers in developing countries can enable them to adapt more empathetic ways of communicating with the poor. This can lead to health workers and patients exploring sensitive health-related issues (e.g. domestic violence) which would otherwise never get mentioned (Welbourn, 1992).

The women's health needs approach has been valuable in bringing attention and resources to sex-specific health concerns. Moving towards a broader understanding of women's health should not obscure the importance and value of reproductive health programmes. However looking at women's health needs should be encompassed as part of a gendered perspective on health and not as separate to it. A gender perspective on health, highlights socio-economic, political and cultural factors determining health status and care and allows for better understanding of the links between women's health and poverty.

11.3. WHY A GENDER PERSPECTIVE IS IMPORTANT IN LINKING HEALTH AND POVERTY CONCERNS

11.3.1 Gender, definitions of well-being and poverty

Both feminist analyses of women's health, and gender analyses of poverty point to the need for a broader understanding of what constitutes women's well-being. A gender perspective broadens the meanings of poverty and health. Naila Kabeer has highlighted how income/consumption based definitions of poverty are male-biased. For women, who are often excluded from the cash economy, a broader measure of well-being, including health, may be more accurate definition of poverty (Kabeer, 1996). Measurements of poverty based on household income also obscure processes of intra-household resource allocation which have significance for women's health and capacity to seek health care. Feminist views on women's health emphasise the need for a holistic approach which includes self esteem, personal autonomy, freedom from violence, and sexual choice.

Inequality and powerlessness are also increasingly seen as being important root causes of ill health. This has gender implications as women are commonly less powerful in their societies/communities than men. Low self-esteem, related to a low status, can lead women to neglect of their own health needs. Poor education and lack of self-esteem may lead to women being unaware that they are suffering from a condition which can be successfully treated, particularly with reproductive health problems. For example, Key (1987) argues that in India, the perceived need for medical help is determined partly by socio-cultural factors governing how pain and discomfort are expressed, how illness symptoms are recognised and which symptoms are perceived to warrant medical care (cited in Tipping, 1995).

11.3.2 Gendered determinants of ill-health

The health impact of the linkages between gender concerns and poverty are most clearly seen in terms of overwork, hazardous work, and poor nutrition. Poverty and gender also have significant linkages in relation to mental illness, vulnerability to violence, and stigmatisation due to health conditions.

Gender-specific labour tasks lead to specific environmental risks and thus to different causes of morbidity and mortality for women. For example, women's risk of exposure to certain tropical disease differs from men's as a result of gender roles related to water (scistosomiasis), cultivation (malaria, filariasis), and domestic roles (dengue, Chagas' disease, and leishmaniasis)(WHO, 1995).Where poverty leads to increasingly heavy work burdens for women it also implies increased risk of ill-health. Table 1 outlines gender-specific, work-related health risks for women.

Table 1: Work related health risks for women

health problem	gender specific/related cause
burns	female responsibility for meal preparation on open stoves or fires
sore and painful, legs, hips, shoulders/fatigue	carrying heavy loads, e.g. water and fuelwood
prolapsed uterus, miscarriage, stillbirth	carrying heavy loads, e.g. water and fuelwood
smoke pollution: cough dyspnoea, respiratory abnormalities, detrimental effects on foetal growth	cooking in poorly ventilated structures using biomass fuel sources
chronic back pain and leg problems	work in small-farm subsistence agriculture: weeding, transplanting, threshing, post-harvest processing
exposure to toxic pesticides (with effects on unborn and breastfed infants)	cash crop production: prolonged exposure through hand labour, e.g. weeding, picking, sorting, in sprayed fields without protective clothing
various hazards to health and safety and exposure to carcinogens, acids, solvents, gases	assembly line production: long shifts, fast paced and intensive monotonous, repetitive work
byssinosis ('brown lung')	working in clothing industry
eye problems, eye-sight deterioration	electronic assembly line work

Source: Paolisso and Leslie, 1995

Poverty drives women to work in hazardous environments. A very direct link can be seen between women's work and women's health in the case of sex workers and the prevalence of STDs including HIV/AIDS among this group. This is exacerbated by poverty where women may be driven into sex work, or into sexual relationships for economic reasons, and therefore may not feel able to insist on condom use (Marcus, 1993). Reports from countries, particularly those in Sub-Saharan Africa undergoing structural adjustment programmes (e.g. Zimbabwe and Ghana) identify how young women concede to pressure from older men and trading sexual favours for school fees, transportation and food and clothing (Sen *et al.*, 1994). Furthermore, unless condoms are free, they may be unaffordable to the poor. The living conditions of poverty, such as poor housing, water and sanitation facilities may mean poor conditions for sexual hygeine, and a lack of suitable places to keep and dispose of condoms and .

Nutrition is a key area where the combined effects of gender inequality and poverty produce ill-health for women and girls. Kabeer (1992) argues that inter-generational transmission of poverty occurs through the undernourishment/overwork particularly of pregnant or lactating women. Nutritional and biolgical deficiencies are transmitted through pregnancy to young children who may then not 'catch up' (Baden with Milward, 1995). Studies in South Asia show that girls recieve less food than boys, with poor nutrition contributing to a number of health problems and conditions. However, studies of gender differentials in in food allocation indicate mixed findings and a more context-specific reality than the theory of women and girls consistently recieving less food in households (Jackson, 1996).

Much controversy has surrounded the relationship between women's work and child welfare, in part based on fears that where women leave children to go out to work there may be negative health consequences. Recent studies, however, have shown that if both income and time effects are

considered, in general, the impact of women working may be positive, because of the greater benefits to children of female income. However, this may not hold for very poor women, working long hours for low pay, or where children are themselves forced to work to supplement household income (Leslie, 1988; Baden with Milward, 1995).

Poverty contributes to mental illness as stress precipitates emotional illness and frequent bereavement, floods, fires, famines, wars, and enforced migration put the poor under great emotional pressure. A study of a Bangladesh village found that sixty-nine out of every 1000 people were found to have significant psychiatric illness and that women outnumbered men, two to one. Many were suffering from anxiety neurosis and depressive illness. Women are also less likely to be among those recieving treatment for mental illness in the developing world. One difficulty is the gap of emotional understanding between rich and predominantly male doctors and poor females (Boylan, 1991).

Gender-based violence is known to occur amongst all socio-economic groups and in all cultures. Therefore it cannot be said to be caused by poverty. However in situations of poverty and economic insecurity women may be less likely to have the resources to leave violent relationships. Links between poverty, gender and violence are also seen in situations of armed conflict or mass population movements, when women are forced to leave their homes as refugees or displaced persons are often separated from the protection of male relatives. The only means of assuring food and safety may be to accede to the demands for sexual favours made by soldiers, border guards or camp administrators (WHO 1995).

Socio-cultural practices related to gender also effect girls/women's health. Female genital mutilation (FGM) has considerable negative impact on health. Poor women/girls may find it particularly difficult to resist FGM for fear of social exclusion. Parents may be concerned to ensure marriage prospects for daughters.

Just as resisting health damaging practices may lead to social exclusion, so too certain conditions of ill-health may lead to women's exclusion and subsequent poverty. For example, the condition of vesico vaginal fistulae can lead to women being abandonned by their husbands and left destitute. Leishmaniasis, schistosmiasis, lymphatic filariasis and onchocerciasis cause profound incapacity and disfigurement and may influence women's marriage prospects (WHO, 1995). This points to the importance of recognising the cycle of ill-health and poverty.

11.3.3 Understanding health care seeking behaviour

Gender analysis emphasises the importance of looking at not only supply-side issues in health service provision, but also demand side issues and the interrelation of the two. A gender perspective is necessary in order to understand health care seeking behaviour and decision making at the household level in the demand for health care services.

Studies of health care seeking behaviour suggest that the constraints of poverty and gender meant that it is poor women (and girls) who are least likely to have access to appropriate care and to seek adequate treatment. The range of factors which limit access for poor women include: the overall socio-economic status of households; time constraints; the composition of households (female headed, extended family etc.); intra-household resource allocation and decision-making relating to seeking health care; lack of education and employment; and legal or social constraints on access to care.

Research on health care seeking behaviour clearly shows that the socioeconomic status of households affects levels of utilisation of health care services. For example, in Ethiopia, Kloos found that the poor used higher level services less often than the non-poor and were unaware of their entitlement to 'free treatment letters' (Kloos, 1990 cited in Tipping 1995). Composition of households is also significant, for example, a study in Sri Lanka found greater demand for services among widows than among women with partners (Keith *et al*, 1990 cited *ibid.*). This may reflect their relative autonomy in decision-making, greater health needs or social isolation.

As women are often the principal providers of household health care, the demands on their time greatly influence household health care seeking behaviour. Poor women's heavy work burdens and the significant opportunity costs of time in seeking care may prevent access to services. Transport costs and time to travel to health facilities, as well as long waiting times at poorly staffed health facilities, all deter people from seeking care. Health care service providers should take account of the constraints on women's time and provide out of hours services and home visits.

As well as differences in utilisation across households, studies show that within households use of health services is differentiated by gender. A number of studies have reported that men spend more money on higher level services than women (e.g. Duggal and Amin, 1989, Heinonen, 1994 cited in Tipping, 1995), and that parents are more likely to seek medical services for sick boys than for girls (Hunte and Sultana, 1987; Paul, 1991; Stock, 1993 cited *ibid.*).

Levels of education (of both men and women) and maternal occupation have also been found to be significant for the utilisation of health care services. A study in the Philippines showed an increased take up of family planning with any kind of maternal employment (Becker *et al*, 1993 cited in Tipping, 1995). Although there is a need for more detailed information on intra-household income and expenditure patterns by gender, the available evidence suggests that women devote a higher proportion of their income to children's nutrition and other family basic needs than do men. One implication of this is that increased female incomes may not automatically correlate with better access to health care for women themselves.

Legal factors and social norms associated with gender can also prevent women from seeking health care. For example the illegality of abortion has serious consequences for women's health due to the risk associated with illicit abortions. Richer women can afford afford to seek abortions abroad where they are available safely and legally, whilst poor women are subject to the dangers of illegal abortions (Oxaal with Baden, 1996). Social restrictions on women's mobility may prevent women from seeking health care outside the home.

11.3.4 Health budget allocation and health services delivery

Some health care requirements are sex-specific, relating to the differences in male and female physiology, a fact most obvious in the sphere of health needs associated to women as mothers. Health budget allocation therefore has gender implications, in terms of the balance of resources which go to areas of specific concern to female health e.g. emergency obstetric care. Changes to reorient the health sector along lines of greater equity of access may have mixed effects in terms of *gender* equity. For example the move to primary health care may improve access to some services for women (e.g. ante-natal care) but may not meet other of women's specific health needs such as emergency obstetric care to prevent maternal mortality.

The increased emphasis on a selected range of PHC interventions on basic health services provision, with child health as a major focus, has not given sufficient consideration to the implications for women's time use of practices such as growth monitoring and ORT (Leslie et al, 1986). This may be especially significant for poor women with severe time constraints. Women's and children's health may be targeted together in MCH budgets, but this may disguise the fact that a greater proportion of expenditure is allocated to the child-based rather than maternal interventions, or that family planning is prioritised over integrated reproductive health services.

Changes in financing mechanisms for health care, such as the introduction of user fees or insurance affect men and women differently. Some studies have shown the relationship between price and health care use to be inelastic, but a failure to disaggregate users may mask the effect of fees on the demand of vulnerable groups. Also studies which only include health care users as the sample are likely to be biased against lower income groups (who are less likely to be users). Some facility-based studies have recorded a drop in utilisation rates following the introduction of user fees, but more information is needed on which groups may account for this drop (see page 6). The effect of fees on demand may also vary according to the type of service, e.g. demand for non-curative services like antenatal care or immunisation may be more elastic, suggesting potentially negative impacts on maternal and child health. A few sources report falls in utilisation of obstetric services following the introduction of changes (Stewart 1991; Oxaal with Baden, 1996) and the 'lumpiness' of fees associated with childbirth may pose particular problems for cost recovery from poor households.

Little data is available on the gender dimension of the burden of cost of new financing mechanisms. It is possible that poor women may shoulder greater burden of cost through payment of fees for other members of their household, whilst receiving less care for themselves. There is a need for more empirical investigation on this issue and for greater consideration to the implications of new financing mechanisms from a gender perspective (Standing, 1997).

Pluralistic healthcare systems

Studies suggest that poor women are likely to utilise a range of health care options other than modern medical practicioners. There are pluralistic medical settings in many developing countries where a range of choices are available including government, mission and community services, modern and traditional private practitioners as well as pharmacists and commercial drug outlets (Tipping, 1995). Household based care, using home remedies of 'over-the-counter' drugs is often the first resort in illness. This may be particularly the case in poor households (Coop *et al*, 1992 and Berman *et al*, 1987, cited in Tipping 1995). A study by Becker *et al* (1993) in Metro Cebu, the Philippines, found that poorer women preferred private providers over public facilities where lower fees were charged and free drug samples were given (cited in Tipping 1995). In Benin, traditional

practitioners were popular due to their lower cost and more flexible payment arrangements. Studies in Mali and Indonesia report greater use of traditional medicine by lower income households (Coppo *et al*, 1992, Berman *et al*, 1987 cited in Tipping).

Studies on the household production of health suggest the importance of looking at a variety of forms of health care including 'traditional' healthcare, self-care, and care at home etc. Gender analysis may show different patterns in terms of which kinds of healthcare are used by which groups. Women, and perhaps especially poor women, may be more inclined to use traditional health practitioners for certain health needs, e.g. traditional birth attendants (TBAs). This may be due to cost factors but also related to lack of cultural sensitivity and respect in mainstream health service provision (see below). Efforts to support and regulate the services of non-formal health providers, such as traditional healers may be important to improve health care for poor women. However, training of TBAs has been found to be non cost effective due to the small and infrequent amount of deliveries each TBA makes (V. Fillipi, personal communication). Another danger is that the integration of private with public health programmes will further limit services available to poor and to women by making alternative services less accessible (Feldman 1983 cited in Tipping, 1995).

Quality of care

Quality of care in health service delivery, and perceptions of quality of care, are key factors in the choice and use of health services, especially in poor households where resources are tightly limited. Until recently approaches to assessing quality have concentrated on the technical quality of service delivery. There is increasing recognition however of the need to emphasise the process of care-giving and the interpersonal quality of patient-provider interaction (Tipping, 1995). A gender perspective also draws attention to a number of other quality of care indicators such as cultural sensitivity, and respect for users. For example insensitive hospital dress requirements, and abusive (poor attitudes and interpersonal skills) treatment by midwives deter women from seeking hospital care in childbirth. 'Social distance' between health care staff and poor women can lead to poor communications, indicating lower quality of care. Poor staff attitudes are related to low morale and can be improved with training and incentives.

Community participation has been identified as having the potential to improve the quality and provision of health care services. However, as with all participatory activities, special attention is needed to the gendered nature of participation. Men's needs and perspectives may dominate, while those of women or the poor get left out, because they are less free to participate, or have less 'voice'. Encouraging men's participation in health programmes may be important to women's health. Educating men and the wider community about signs of an emergency in labour, for example, is important so they know when to seek care.

Gender divisions of labour in the production of health care

Leslie et al (1986; 307) estimate that 75 per cent of health care takes place at household or community level, and is predominantly supplied by women. Women form a high proportion of informal and community-based health providers (e.g. community health workers, traditional birth attendants) as well as lower-level professional or ancillary staff in formal health services. Current processes of health sector reform have implications for staffing structures, incentives, skills and rewards and different levels of the health system, as well as at household level, which may act to reinforce gender divisions and biases in the provision of health care.

11.4. IMPLICATIONS FOR POLICY OF A GENDER EQUALITY PERSPECTIVE

A range of implications for policy and programmes arise from a gender perspective on health and poverty:

• **Attention to women's non-reproductive health needs:** A gender and poverty perspective highlights the need to include reproductive health as part of a broader conception of women's health needs. Poverty lays women vulnerable to a range of health problems, some but not all associated with reproductive health. The heavy burdens and hazardous conditions which may be associated with poor women's work increase vulnerability to a range of health problems, as does poor nutrition.

• **Non-health sector strategies:** A gender perspective on health and poverty highlights that the constraints to poor women's access to health services are not only the result of poverty, but also of gender inequality. Non-health sector strategies are needed to address socio-economic and legal issues (e.g. legality of abortion, rights of girl child) which affect gender inequality.

• **Multi-disciplinary inputs:** There is a need for multi-disciplinary inputs in the design and implementation of health care projects in order to understand gender-specific cultural, political social and economic circumstances (DGIS, 1989).

• **Primary health care interventions** should assess the costs and benefits of interventions to women, as well as children, with particular attention to time constraints.

• **Community participation initiatives** must ensure that the perspectives of poor women are included. For example, an innovative initiative in China drew policy-makers attention to women's perspective on health needs through the technique of photo-novella (see Box 1). In the context of the decentralisation, local health committees need to develop greater community involvement and accountability, including to women.

• **Information for household care**: As women are important providers of care at household level, it is important that they receive appropriate information on managing the most common fevers, recognising signs of severity and seeking prompt treatment (WHO 1995) particularly in situations of poverty where medical help is less likely to be sought. Studies of health care seeking behaviour in poor households also highlight the importance of educating men as well as women about health issues. This may be especially significant in poor households in improving the information on which decisions to seek care are based.

• **Focus on quality of care:** Studies show that perceived quality of care is a particularly important factor in decisions to seek care especially when charges are introduced. There is a need to incorporate patient management, care giving and interpersonal patient-provider relationships into quality of care assessments and improvements. Both professional and users assessments should be used to give comprehensive picture of quality and perceptions of quality (e.g. Tipping, 1994: 23). There is also a need for qualitative assessment methods which encourage women users in particular to describe their experience of health services (Tipping 1995).

• **Services convenient for women:** The availability of services must take into consideration time constraints which particularly affect poor women. Home visits and out of hours service provision should be available. Variations in the pressures on women's time suggest a need for the preparation of community time budgets in order to decide when and how services should be offered.

Box 1: Participatory methods for identifying women's health needs: women's photo novella in rural China

The Ford Foundation-supported Yunnan Women's Health and Development Program has used the innovative methodology of a photo-novella in order to:

- empower rural women to record and reflect their lives, especially their health needs, from their own point of view;
- increase their collective knowledge about women's health status;
- inform policymakers and the broader society about health and community issues.

Photography can be used to promote the specific concerns of groups whose voices are seldom heard in the policy arena. Exhibits of the photographs in public spaces helped to garner the attention of policymakers and the media and a key advantage turns on the power of the visual image. Women of differing ages, marital status, income, ethnicity and educational background were selected by the Chinese Women's Federation and given intensive training in the photo-novella process.

The photo novella experiment influenced policy on day care, midwifery, and girls' education. Women's photographs and discussions highlighted the dangers and health risks experienced by children left unsupervised in the field, while mothers engaged in heavy farm labour. As a result, a programme initiative to provide day care for toddlers emerged. Photographs also acted as a catalyst for discussion among women and policymakers about the lack of birthing assistance for women, the widespread use of instruments such as unsterilized scissors and the use of 'sickle and tile' to cut umbilical cords and the associated risks. A picture of a woman lying in bed with her three-day old baby after a home delivery was explained in terms of the inability of the family to afford the midwifery fee. This enabled the village women to challenge publicly the common assumption that ignorance rather than poverty prevented mothers from taking advantage of midwifery services. The discussion shed light on the provincial and county MCH bureaux' responsibility to provide midwifery training, services and know-how. The photograph and discussion served to define the situation from rural women's point of view and to identify gaps in services.

source: Wang, Burris and Ping, 1996

11.5. NEW DIRECTIONS: AREAS FOR FURTHER RESEARCH/POLICY DEVELOPMENT

The analysis here highlights a number of possible areas where further research could inform new directions in integrating gender, poverty and health concerns:

Gender disaggregated data: Currently in health systems writing there is limited disaggregation of data by gender, thus it is not possible to say whether improved access for the poor or for disadvantaged regions translates into equal improvement for women and men. There is a real need for more gender disaggregated data (Standing, 1997).

The household production of health (HHPH) approach provides considerable potential for greater integration of gender analysis in studies of health/well-being and poverty, and specifically on: gender differences in time and expenditure allocation in health care; and on processes of decision-making and bargaining within the household in relation to decisions to seek care.

Research into the impact of changes in health financing specifically on poor women: Although a considerable amount of research exists on the impact of user fees, much of this work may exclude poor women. Changes in health service provision may improve equity of access generally, but this may hide the impact on poor women. Research is also needed on feasible financing mechanisms for gender-specific health services such as obstetric care.

The implications of current health sector reforms for gender divisions in skills training, professional status and incentives for health sector workers (formal and non-formal). This requires further investigation in relation to its potential impact on the quality of services to women, changes in the incomes and status of health workers and the extent of household level health care.

Lessons could be drawn from studies of utilisation and perceptions of non-formal health services (from the perspective of both providers and users, particularly poor communities) to suggest both improvements in formal care provision and appropriate mechanisms for supporting and regulating non-formal providers.

Gender, environmentally sustainable development and poverty

By Rachel Masika with Susan Joekes

ACRONYMS

CPR	Common property resources
ESD	Environmentally sustainable development
FAO	Food and Agriculture Organisation
IIED	International Institute for Environment and Development
IOM	International Organisation for Migration
PEC	Primary environmental care
UNEP	United Nations Environment Programme
WCED	World Commission on Environment and Development
WED	Women, environment and development approach
WID	Women in development approach

12.1. ENVIRONMENTALLY SUSTAINABLE DEVELOPMENT AND POVERTY

12.1.1 Environmentally sustainable development: conceptual shifts

There are numerous definitions of sustainable development, and much debate about what constitutes environmentally sustainable development. In the broadest sense **sustainability** refers to the capacity of socio-ecological systems to persist unimpaired into the future (Raskin *et al*, 1996). 'Environmental sustainability' refers to the maintenance of the ecosystem and the natural resource base. Environmental degradation signifies failure in this regard. It takes three forms: depletion of resources; pollution, or overuse of the waste-absorbing capacity of the environment; and reduction in biodiversity, a loss of some types of resources. 'Social sustainability' is the term used to refer to the social conditions necessary to support environmental sustainability (Hardoy *et al*, 1992). This stresses the fact that natural resources are used within a social context and that it is the rules and values associated with this context that determine the distribution of resources within the present generation and the next.

More recently, there has been more emphasis on the notion of '**resilience**[33]'. Ecologists have reached a better understanding both of the processes involved in the ecosystem's capacity to recover from shocks and stresses (such as drought) and of people's capacities to facilitate the recovery of the ecosystem and to diversify their livelihood activities from natural resource-based to money or market-based activities.

12.1.2 Dimensions and goals of environmentally sustainable development

The most commonly accepted understanding of environmentally sustainable development (ESD) is encapsulated by the Bruntland definition; 'meeting the needs of present generations without compromising the ability of future generations to meet their own needs' (WCED, 1987). It is recognised that meeting essential needs requires economic growth and equity facilitated by 'political systems that secure effective citizen participation in decision-making' (*ibid*). ESD has several dimensions (see Box 1) implying different types of needs: economic, social, political and ecological.

However despite the multi-dimensional nature of ESD there is a common goal: development that enhances rather than depletes environmental capital or assets. Hardoy *et al* (1992) point out that environmental capital can be divided into three broad types:

- The 'natural sink' capacity of local and global systems to absorb or break down organic wastes and absorb gases without adverse effects on climate or the stratospheric ozone layer.

- The finite stock of non-renewable resources e.g. fossil fuels and other minerals. Biological diversity, one key part of environmental capital, might also be considered a non-renewable resource.

[33]Resilience is an ecological concept which in recent years has been used by socio-economists. Resilience is the time it takes to recover from shocks and stresses. It refers to the point at which the system can recover from stresses (personal communication with Lloyd Anderson).

- Renewable resources such as. crops and trees which are renewable only within finite limits set by the ecosystem within which they grow. Fresh water resources are also finite; in the case of aquifers, human use often exceeds their natural rate of recharge and as such is unsustainable.

Box 1: Dimensions of environmentally sustainable development

Economic dimensions: economic needs such as adequate livelihood and productive assets, and systems how these interact with the environment.
Social and cultural dimensions: social and cultural needs and systems e.g. health, education, shelter, equity, cultural institutions and norms, and their relationship with the environment.
Political dimensions: political needs (ability to participate in decision-making processes) and systems and how they influence the environment.
Ecological dimensions: The maintenance of ecosystems and the natural resource base.

Sources: Raskin *et al* (1996); UNCHS (1996); WCED (1987); Hardoy *et al* (1992).

12.1.3 Poverty and environmental sustainability

The linkages between poverty and environmental issues are affected how poverty is defined, by the type of environmental problem in question, and by which groups among the poor are affected.

Research and policy has tended to focus on the relationship between poverty and environmental degradation in terms of pointing out that the poor are both victims and agents of environmental degradation: victims in that they are more likely to live in ecologically vulnerable areas, agents in that they may have no option but deplete environmental resources thus contributing to environmental degradation (Sida, 1996; Leach and Mearns, 1991; UNEP 1995). However, it is also acknowledged that the poor often have practices that conserve the environment. Great physical and spatial variability in natural resource endowments also seem to complicate the picture (Redclift and Skea, 1997).

In general terms, the underlying causes of both poverty and environmental degradation are structured by uneven processes of development operating via technologies, incentives, institutions and regulations which favour some social groups and some geographical areas over others (Leach and Mearns, 1991).

The broadening of general poverty debates to include other measurements and dimensions of poverty (in addition to income/consumption based flows) such as entitlements and vulnerability is evident in the literature looking at poverty-environment interactions. A recent development is the understanding that linkages between poverty and environmental change are determined by environmental entitlements as well as changes in resource availability.

At the micro-level (individual, household, village), environmental entitlements are determined by a range of factors including natural resource tenure arrangements, labour mobilisation arrangements, social relations (including gender), capital endowments and technology. At the

macro-level (sub-national, national, global), wider processes operate via decisions on technologies, incentives, institutions and regulations (land rights) to favour some social groups and some geographical areas. These processes include demographic changes, environmental processes, macroeconomic policies, markets and prices, donor and development agency approaches to poverty and environment, agricultural research, governance and political conflict (Leach and Mearns, 1991; Leach, Mearns and Scoones, 1997).

Vulnerability is an another environmentally relevant dimension of poverty that is discussed in the current literature. It is a measure of the robustness/resilience and variability in income or livelihood sources in the face of shocks and stresses, and thus people's capacity to cope with and respond to them.

12.2 HOW MAINSTREAM DEBATES ADDRESS GENDER EQUALITY

12.2.1 Gender and environmentally sustainable development

Much of the mainstream literature on ESD has ignored gender relations. Where attention has been paid to women, thinking has been mainly influenced by the women in development approach (WID)[34] (Joekes *et al*, 1996). Broadly, women, environment and development (WED) thinking stresses the 'managerial' aspects of economic development. This seeks to minimise negative effects of the process of economic development by targeting women as recipients of environmental development assistance, simultaneously considering the effects of development on the environment, an approach propagated by many development agencies.

A more philosophical stream of WED sees women's position as essentially closer than men's to nature because their work has always entailed a close relationship with nature. Women are depicted as naturally privileged managers of environmental resources. An economistic line of WED emphasises women's work: the sexual division of labour that has led to women's particular role in managing natural resources. (Bradiotti and Wieringa, 1994)

Feminist critiques have pointed out that WED conceptualisations are flawed because of three main reasons.

- First, environmentally friendly management practices by women can be explained in terms of rational short-term interests. For instance, women may only collect dry wood for fuel because it is lighter and easier to carry, and certain tree species may be protected by custom or religious sanction rather than by women's motivation to conserve resources (Jackson, 1993).

- Second, relations of women to the environment cannot be understood outside the context of gender relations in resource management and use. Women's relation to natural resources reflects social-structural forces, within the framework of gender relations which systematically differentiate men and women in processes of production and reproduction. These forces relegate/confine women to environmentally-based activities by limiting their access to other types of livelihood activity (*ibid*).

- Third, like WID approach, the WED perspective completely focuses on women at the exclusion of men, and pays little attention to differences among women (Joekes *et al*, 1996).

In recent years, there has been an increasing focus on linkages between gender and the environment in development research, policy and practice. Gender-environmental relations are seen as integral to the social and economic organization which mediates people's relationships with their particular environment. Gender is also viewed as a key dimension of social difference affecting people's experiences, concerns and capabilities in natural resource management. These analyses recognise that gender relations have a powerful influence on

[34] Women, environment and development (WED) is the name given to WID as discussed in the environmental context.

how environments are used and managed over time and the affects of this on patterns of ecological change (Leach *et al*, 1995).

12.3 WHY A GENDER PERSPECTIVE IS IMPORTANT

Environmentally sustainable development requires that livelihood activities be ecologically sound, socio-culturally acceptable, economically viable and equitable in terms of access to resources, benefits and decision-making processes. In this respect a gender perspective is essential for achieving the goals of environmentally sustainable development because of three overlapping factors which if ignored can result in further depletion of environmental capital:

- experiences of poverty and environmental change are gender-differentiated;
- environmental security is mediated by gender relations;
- women and men have both conflicting and complementary interests and roles in environmental management.

Environmental interventions need to take into account the relationships between environmental sustainability and gender equality. Other factors such as age, class and ethnicity which also influence gendered experiences of poverty and environmental change are equally important.

12.3.1 Gender, poverty and environmental change

There are significant differences between women's and men's experiences of poverty and environmental change because of gender inequalities in ability to have command over environmental resource entitlements (e.g. land, trees), labour and income. This inequalities leave women with limited flexibility to respond to environmental changes in ways which maintain environmental resources.

Command over labour and environmental change

An illustration of this inequality is the gendered nature of labour and how it may result in negative environment change. Women's heavier total workload constrains the allocation of their labour time, for example, forcing them more often than men to make trade-offs between environment conserving activities, socio-economic activities and health. For example, a woman who may have to combine food production with work on a husband's cash crops may have little time to invest in regenerating and sustaining the natural resource base. In parts of Nepal, women travel long distances to find fuelwood due to deforestation. This reduces their inputs into agricultural production and environmental conservation (Leach and Mearns, 1991). These examples point to women's effective incapacity to make certain choices.

Livelihood strategies and environmental change

Generally, women's livelihood strategies are more limited than men's. Participation in distant labour markets is an extremely flexible strategy for minimising risks such as unpredictable variations in rainfall that result in natural crises. Men are more able than women to resort to migration, as a longer-term strategy to reduce exposure to risk, whilst women may be thrust into greater dependency on the natural resource base. The widely held view that male out-migration makes women more vulnerable is questionable because in some instances male

migration gives women greater decision-making powers, and opens up new livelihood possibilities (Redclift and Skea, 1997).

Other livelihood strategies such as accumulating savings for harder times are not gender neutral. Gender disparities in access to income, combined with intra-household expenditure divisions and lesser rights in natural resource use, restrict women's ability to accumulate savings which could be a springboard to other rural non-farm activities. Consistent with this is the observation that in general, the poorer the household the greater the dependence on the natural resource base and on customary rights of access to common resources e.g. firewood for cooking, fodder for feeding livestock, wood for the construction of houses. Such access is particularly important to women. This access is also gender-differentiated. In parts of sub-Saharan Africa, men's rights to trees and their products tend to be stronger than women's rights since men have full disposal rights while women have use rights only for gathering fuel (Joekes *et al*, 1996).

Women's greater dependency on common property resources (CPR) has been documented for India. Agarwal (1994) shows that rural women depend more than men on employment in agriculture (women's share of labour force participation is 85 percent, and male labour force participation in agriculture is declining) and on the natural resource base and common property resources. This high dependence on CPR in India has policy implications for women, particularly as the productivity of India's CPR is falling drastically, and the acreage decreasing (as a consequence of high population density, land privatisation, codification and titling etc.)(Jodha, 1995;1991). Access to CPR is being curtailed by changes in land tenure fuelled by privatisation and land grabbing (Sida, 1996). In addition, commercial pressures in many places are leading community institutions to re-interpret customary rights and obligations from collective use to individualised rights (Woodhouse, 1997), a process which often disadvantages women.

Macro-economic policies, poverty and environmental change

Links between macro-economic policies, gender relations, poverty and the environment are not clear. Wee and Heyzer (1995) attempt to show through case studies from different Asian countries, how national and international economic policies that contribute to environmental degradation also fuel the feminisation of poverty. In these contexts, they suggest that women's resource loss and their increasing poverty has to be understood at three levels:

- in terms of persisting gender inequities derived from the historical past, which have traditionally subordinated women;

- in terms of the reinforcement of existing inequities to serve the context of the present, such that women are excluded and disenfranchised from increasingly scarce resources;

- in terms of new processes that have resulted in women's loss of livelihood resources (Wee and Heyzer,1995).

However, the links between women's loss of livelihood resources and material impoverishment under environmental change are not clear. In Morocco, very resource-poor communities without recourse to external high wage migration opportunities in Morocco, women are impoverished by environmental change in terms of increased energy demands and workloads,

but there is no data on other measures of poverty (El Mdaghri, 1995). A study of some communities in Limbang district, Malaysia highlighted variable community responses to declining resource availabilities. in the face of deforestation and changes in government policy (Heyzer, 1995). In terms of material indicators women were better off than before. The lack of diversity in livelihood activities may have increased women's vulnerability, but not their actual standard of living. By contrast, in Kenya, anthropometric data shows that men's body weight fluctuates more inter-seasonally than women's (Oniango, 1995).

Whether women's position in terms of relatively less access to resources, labour and decision making powers to invest in managing natural resources translates into greater poverty depends on whether they can lay claim to other forms of support from households, kin etc. when disaster strikes. This inevitably depends on the nature of gender relations in any given location.

Impact of environmentally induced population displacements

The environmental impact of mass migrations, and environmental change as a cause for migration are increasingly receiving attention (IOM, 1996) while concern with the impact of migrants on the natural environment of host regions is relatively new. The environmental impact of mass migrations may be different for men and women. Pressure on firewood may be felt initially by women in terms of increased journey times. In the camps at Dadad, in Kenya there was some concern that travelling long distances to fetch firewood made women more vulnerable to banditry and violence.

Time spent cooking may increase for women in cases of environmental changes such as deforestation. Women may have to resort to using green wood rather than dry wood. (Richard Black, personal communication).

12.3.2 Gender relations and environmental security

'Environmental security' (access to clean water, clean air and non-degraded land) (Redclift and Skea, 1997) is influenced by gender relations. Men and women in rural areas are primary resource users, but access to resources is socially constructed, so that men and women derive different benefits and uses from natural resources, and in times of environmental shocks and crises may have fewer assets to fall back on, and limited diversification strategies.

Entitlements analysis of environmental security

Entitlements analysis provides a framework to show how access to and control over resources is socially differentiated by focusing on **'endowments'** (the rights and resources that people have e.g. land, labour, skills etc.), **'environmental entitlement'** (the utilities derived from environmental goods and services over which people have legitimate effective command such as direct uses in the form of commodities, such as food, water, or fuel; or to environmental service functions, such as pollution sinks or properties of the hydrological cycle) and **'capabilities'** which are what people can do or be with their entitlements e.g. command over fuel resources derived from rights over trees (Leach *et al*, 1997). The example

of south Ghana illustrates the gender differences in access and use of Marantaceae plants, commonly collected for wrapping food, kola nuts and other products (See Box 2).

Box 2: Entitlement analysis

Endowments - rights over the leaves	- on government reserved land, collection rights are acquired through a permit system - off-reserve, collection rights are acquired through membership or negotiation with the landholding family or household
Entitlements - effective command over income from leaves (labour and marketing)	-women may have to negotiate labour time to collect leaves -access to marketing is through village-based or visiting traders
Capabilities - to satisfy needs	- whether a woman can keep control of the income, and how it used depends on intra-household bargaining arrangements

Market-based alternatives for environmental security

Because of their nature of responsibilities and direct dependence on land-based resources, women are the hardest hit by environmental degradation (UNEP, 1995), particularly in rural areas where women's livelihoods tend to be more resource-based rather than money-based (Wee and Heyzer, 1991). Poor women may become trapped into short time horizons with respect to resources over which they have little control because they lack assurances of future access to resources and because they lack other economic opportunities. To the extent that they are excluded from participation in the market economy, they also rely directly on non-market natural resources for their immediate survival (UNEP, 1995).

Money- or market-based activities are important fall-back options when environmental security is threatened by variations in rainfall, desertification, soil and land degradation, flooding etc. In general, men have more diversification strategies than women to limit environmental risks and vulnerability such as migration. Women have less access to productive assets, and in cases where they do hold assets. These tend to be consumption-based assets with low disposal value (Kabeer, 1991).

Health and environmental security

An immediate environmental problem is ill-health caused by biological and chemical agents in water, food and the soil. Whilst both men and women, and indeed children may be subject to parasitic infestations, women and children may be more likely to suffer from respiratory diseases caused or exacerbated by smoke and fumes from biomass and fossil fuels used for cooking due to their greater levels of exposure (Hardoy *et al*, 1992).

12.3.3 Gendered interests and incentives in environmental management

Women tend to have a greater involvement in environmentally sustainable activities and environmental management than men, but may incur certain costs or lack the required resources and decision-making powers to command control over resources.

Gender differentials in environmental resource management

Men's and women's interests in and incentives for environmental resource management differ in many situations, partly because of their socially constructed roles, and partly because of their lesser property rights and gendered interests. Women's socially constructed roles typically involve them in the management and use of environmental resources. A study of poor communities in three Latin American countries (see Box 3) indicated that women make significantly larger contributions to managing or ameliorating the negative effects on family welfare of natural resource decline and environmental pollution, particularly among the poor (Paolisso and Gammage, 1996).

The study found that women's time and task allocations change in response to environmental degradation. Environmental tasks appear to impose additional burdens on women, in part because their existing productive and reproductive activities are not easily transferred to other household members. This inability to substitute for female labour arises from high demographic dependency ratios, existing demands on household labour and socio-cultural practices that determine the gender division of labour. Women's environmental tasks represent an important part of the household's first line of defence against environmental degradation. Despite the time they spend mitigating the costs of environmental degradation, women and their families are still at risk of environmental health problems because public infrastructure and services are scarce, because women face difficult poverty and demographic constraints, and because information about environmental health risks and dangers is not widely available (*ibid*).

Box 3: Women's responses to environmental degradation

In La Argelia, a peri-urban area of Ecuador, women undertake the majority of environmental management tasks; caring for family members who are ill with water or media-borne diseases; purification of drinking water and the management of domestic waste. The research also found that poverty and migration status greatly influenced environmental management practices in this area. The poorer households were disproportionately those who had recently migrated from rural or other peri-urban areas, and were more likely to engage in environmental practices due to increased exposure to environmental risk.

In Cerro Navia, a peri-urban area of Santiago in Chile, 88 percent of women interviewed reported that they regularly wet and dampen roads, sidewalks, and paths to reduce the spread of dust. Women engaged in risk minimising e.g. bagging all household waste, keeping animals and vermin from garbage, securing garbage until it is collected. Only 30 percent of women reported receiving help from other household members. Using regression analysis, it was determined that time dedicated to environmental tasks by women increased if that woman was a household head.

In rural Honduras, environmental degradation, measured in terms of the soil quality available to households for corn production, affects men and women differently. The study found that women's responses to environmental degradation are much more conditioned by their reproductive and domestic responsibilities. The demographic composition of the family had a strong effect on a woman's time spent growing corn.

Source: Paolisso and Gammage (1996)

Tenure rights, ownership and environmental management

Other research shows that women's natural resource tenure rights and control over decisions rarely match their extensive environment-related work responsibilities. In Zaire, for example, men usually allocate securely-tenured household land to permanent tree crops such as coffee. Women's food crops are marginalised onto annually-rented steeply-sloped land with erosive soils, where they have little incentive to invest in soil conservation structures (Leach and Mearns, 1991).

Power over decision-making and environmental management

The many different ways in which water is used and managed often have distinct implications for men and women users. In Comoe, Burkina Faso, women were in charge of rice production on the lowlands and men worked on higher value crops on the rainfed uplands. Development staff nevertheless deferred to the men for inputs on the design and management of new rice irrigation works, despite the fact that the men had limited knowledge of irrigated rice and that their interest was limited to land value (van Wijk *et al*, 1996).

12.4 POLICY IMPLICATIONS RESEARCH DIRECTIONS FOR GENDER-AWARE ENVIRONMENTALLY SUSTAINABLE DEVELOPMENT

12.4.1 Policy Implications

Diversifying livelihood strategies

There is a need to widen the range of livelihood choices available to poor men and women, taking into consideration gendered differences in rights over land and resources. This implies a need for non-environment focused interventions such as market-based initiatives to enhance environmentally sustainable development (Leach and Mearns, 1991; Joekes *et al*, 1996). Other poverty reduction focused measures are also a prerequisite for environmentally sustainable development. Investments are required in both natural and human capital (UNEP, 1995).

Natural resources management

Alternative approaches are required which focus that focus on more on resource users rather than resources, recognising that women are key agents of change (Steady, 1993). Effective natural resources management requires a genuinely participatory approach that emphasizes the different activities of household members to ensure that different uses and impacts of natural resources are recognised and accounted for in natural resource management (van Wijk *et al*, 1996). Where charges e.g. for water are involved, policies need to take account of the fact that women have lesser command over cash than men and that where men control household expenditure, they may not give proper weight to women's interests or priorities. Policy needs to recognise that men and women's interests in and incentives for environmental resource management differ in many situations. Furthermore, environmental management initiatives should give some consideration to women's time constraints and workload. Projects that rely heavily on women's inputs should pay for women's time and labour.

Valuing women's work

There is a need for greater attention to women's contributions to enhancing environmental capital. 'Both women and the environment are "shadow subsidies" that enable profits to be made, because both are taken as free goods'. There is undervaluation of both environmental resources and of women's labour in managing and conserving these. Methods of valuing women's work as well as environmental goods need to be incorporated into approaches to environmentally sustainable development.

Institutional aspects of environmental change

The institutional aspects of environmental change require some policy attention. There is widespread consensus within international development circles that environmentally sustainable development should be based on local-level solutions derived from community initiatives. But expectations often fall short because community approaches tend to ignore power and social difference. In terms of bargaining power, interests and needs, community-based organisations can, like other institutions, reproduce relations of unequal power and authority (Leach *et al* 1997). Policies aimed at environmental solutions through

decentralisation, particularly the devolution of responsibility for natural resources to local communities need to consider social difference and gender relations.

Property rights

In the wider context, attention to women's lesser property rights is required and the danger of further institutionalising gender disadvantage with moves towards individual ownership, unless counteracting measures are taken. Strengthening women's legal rights needs to be complemented by measures to improve women's bargaining power at local level

Macro-micro policy linkages

There is a need for approaches that address both macro and micro problems. A recent approach to operationalising sustainable development within the development context has been Primary Environmental Care (PEC), promoted by NGOs. However, PEC deals only with environmental problems at local project or regional levels in the South. It does not address such poverty-inducing macro-economic processes as structural adjustment policies and austerity measures, which impose added stress on local environments in so far as they necessitate people's increased reliance on local resources for their survival needs (Braidotti and Wieringa, 1994).

12.4.2 New Directions

There is a need for more detailed research to establish the links between gender relations and environmental management, drawing on institutional and environmental analysis (Joekes *et al*, 1996). This will include examination of the trade offs faced by poor women between sustainable management of environmental resources, economic benefits and well-being.

Use of pricing instruments in the management of environmental resources has gender-differentiated effects, as on *a-priori* gender analysis would suggest (Joekes *et al*, 1996).

The gender biases in community organisations and other forms of governance at the local level are a theme that warrants specific research (*ibid*).

Gender, infrastructure and poverty

By Rachel Masika with Sally Baden

ACRONYMS

DGIS	Netherlands Development Co-operation Agency
ECFA	Engineering Consulting Firms Association
EDI	Economic Development Institute (World Bank)
FDI	Foreign direct investment
FHH	Female headed households
FRP	Feeder Roads Programme (Mozambique)
ILO	International Labour Office (Geneva)
IMT	Intermediate means of transport
IRC	International Research Centre on Water and Sanitation (the Hague)
ITDG	Intermediate Technology Development Group
IWTC	International Women's Tribune Centre (New York)
JDI	Japan Development Institute
NGO	Non-government organisation
NMT	Non-motorised transport
Sida	Swedish International Co-operation Agency
SIP	Sectoral Investment Programme
SSA	Sub-Saharan Africa
UNCHS	United Nations Centre for Human Settlements
VLTTS	Village level travel and transport surveys
WCC	Women's Construction Collective (Jamaica)

13.1 MAINSTREAM DEBATES ON POVERTY AND INFRASTRUCTURE

13.1.1 Infrastructure: definition and approaches

Infrastructure has been defined in terms of the physical facilities (roads, airports, utility supply systems, communication systems, water and waste disposal systems etc.), and the services (water, sanitation, transport, energy) flowing from those facilities (Sida, 1996). Fox (1994) defines public infrastructure as 'those services derived from the set of public works traditionally supported by the public sector to enhance private sector production and to allow for household consumption'. The importance of infrastructure as an instrument of economic development and, potentially, poverty reduction, is reflected in the high level of investment which national governments and international donor agencies put into infrastructure development.[35]

Infrastructure provision has traditionally been the preserve of engineers with planners focusing on meeting technical goals related to operational efficiency, rather than goals related to economic development or poverty reduction. Technical experts employing similar methodologies have implicitly assumed that conditions in developed and developing countries, or between one place and the next, are similar. Infrastructure 'has been marginal to socio-economic development debates' (Cottam, 1997: 68) and there has been little attention, until recently, to the impact of infrastructure provision on different social or income groups.

Inefficient provision and maintenance of infrastructure and basic services in developing countries, exacerbated by debt and economic restructuring, have led to the introduction of new forms of ownership, management and financing in infrastructure provision, which is no longer seen as the exclusive preserve of the public sector (Levy, 1991). The introduction of market principles into infrastructure provision has led to renewed interest in the demand for infrastructure services, in contrast to the earlier focus on supply. Current policy debates focus on three inter-linked aspects of infrastructure provision:

- access and appropriateness;
- financing and cost recovery mechanisms;
- community participation, ownership and management.

In the context of economic liberalisation and macro-economic development, infrastructure provides an enabling environment for the productivity of households and firms. Infrastructure provision also has important implications for equity and poverty (Levy, 1991; Singh *et al*, 1996; Fox, 1994; Sida 1996).

[35]Investment in infrastructure was found to represent around 20 per cent of total investment in a sample of low- and middle income countries, and to account for 40 -60 per cent of public investment (UNCHS, 1996). Individuals, private firms and NGOs have also made substantial investments.

13.1.2 Infrastructure and poverty linkages

There has been much debate about whether current infrastructure service provision benefits the poor. Some evidence suggests that certain types of infrastructure service provision, e.g. roads and transport, have a potential contribution to agricultural output, and that infrastructure improvements (in electricity supply, transport and telecommunications) in small towns contribute significantly to industrial growth and employment.[36] At a community or individual level benefits can accrue to the poor if labour-intensive methods of construction are used rather than capital-intensive methods (Sida, 1996).

Box 1: Infrastructure and poverty linkages

- Public infrastructure of acceptable quality stimulates economic growth and is a pre-requisite for economic and social development. The quality of infrastructure and service provision is important in attracting foreign direct investment (FDI), with the potential to generate new employment opportunities (*ibid.*). Research generally finds that infrastructure capital has a positive effect on economic growth and output in developing countries (Kessides, 1993b; Fox, 1994).

- Access to a range of basic infrastructure services (e.g. clean water, sanitation) is often regarded as an indicator of well-being (Sida, 1996).

- Infrastructure services can reduce poverty through health improvements, for example, by improving water and sanitation, which decreases incidence of illness, and associated lack of productivity.

- The way in which infrastructure is financed influences the distribution of income in society (Sida, 1996). Price subsidies to public utilities and parastatals usually benefit the well-off and industry more than the poor (*ibid*). Infrastructure provision such as better transportation and water services can be very effective in raising incomes of some people (depending on region, income group)(Fox, 1994).

- Construction of infrastructure facilities may lead to employment opportunities for the poor, or, alternatively, to a loss of jobs. Labour-based methods in the construction and maintenance of infrastructure provide employment and incomes for poor people (Howe and Richards, 1984), but in some cases, workers may lose their jobs, e.g. where a new source of electricity leads to the introduction of labour-saving technology (Fox, 1994).

Box 1 illustrates the potential contributions of infrastructure services to poverty reduction. While there is considerable evidence that infrastructure development is correlated with economic growth, there is less evidence to support a positive impact on poverty. In general, non-poor households rather than poor households seem to benefit more from public infrastructure investments (Howe and Richards, 1984; World Bank, 1994; UNCHS, 1996). In Bangladesh, for example, non-poor groups receive over 80 percent of public expenditure on infrastructure (Sida, 1996: 81, citing Kessides, 1993a). Moreover, infrastructure development can have negative impacts on specific social groups, due to displacement, environmental pollution and health risks and loss of livelihood, for example.

[36] An important ingredient in China's success with rural enterprise has been a minimum package of transport, telecommunications and power provision at the village level (World Bank, 1994).

Generally, the urban poor are increasingly situated at the periphery of cities where access to city facilities and job opportunities is restricted.

Accessibility of infrastructure services

Analyses of poverty and infrastructure services show how in many developing countries, the poor's access to infrastructure is limited, and cite numerous examples of self-provided infrastructure e.g. assembling materials to build shelter, purchasing water from vendors, as a response to the lack of access to publicly provided infrastructure.

Devas (1991) suggests that a host of factors explain why existing infrastructure interventions fail to serve the poor:

- the inadequacy of provision in relation to the huge scale of need;
- the relatively high standards adopted, which means either that the poor cannot afford what is offered, or else that a substantial subsidy is required which the government cannot afford;
- any subsidy element is likely to accrue either to higher-income groups, or to the public officials who administer infrastructure services;
- failure to address the fundamental obstacles which the poor face in gaining access to land and basic infrastructure;
- inappropriate forms of infrastructure and services, together with inadequate resources for operation and maintenance, which means that services do not effectively reach those who need them, or fall into disrepair and disuse;
- the adoption of policies which discriminate against the poor or impede them from improving their situation, such as regulatory standards which are unaffordable by the poor, and harassment of informal sector providers.

Subsidised provision of infrastructure is often proposed as a means of redistributing resources from higher income households to the poor. Yet its effectiveness depends on whether subsidies actually reach the poor (World Bank, 1994). Arguments for the removal of subsidies has drawn on research illustrating the ways in which the poor are currently paying up to 100 times more for services than those connected to the formal system (e.g. the poor use kerosene instead of electricity for lighting, buy water from private vendors rather than public standpipes) (Cottam, 1997). However, infrastructure subsidies can be designed to improve their effectiveness in reaching the poor. For example, for water, increasing block tariffs can be used: charging a low rate for the first part of consumption then higher rates for additional blocks of water. Subsidising **access** to public infrastructure services is often more useful for the poor than price subsidies (World Bank, 1994; Sida, 1996).

The recent popularity of cost recovery[37] approaches to financing infrastructure is supported by feasibility studies that have shown that people are willing to pay for certain services, and the fact that many poor people do pay more for services. However, problems of the sustainability of community financing, affordability and access are not adequately considered (Yeung, 1991). Furthermore, the poor's lack of access to credit limits the people from initiating and contributing to micro-level strategies, such as upgrading their dwellings or paying for connections (EDI, 1991).

[37]Cost recovery refers not only to the financial measures for initial outlays but also to long-run maintenance and operating procedures.

Institutional development and participation

Recent debates on infrastructure provision and poverty alleviation place institutional reform of service provision high on the agenda. It is acknowledged that new forms of technology require new institutions to implement them. There has also been more attention to the need to incorporate 'civil society' participation in the design and implementation of infrastructure and service provision. This reflects the 'new orthodoxy' of the creating an enabling environment, capacity building and the 'need to let ordinary people take charge' (Cottam, 1997).

The World Bank sets out four main institutional options;

- public ownership and operation by enterprise or department;
- public ownership with operation contracted to the private sector;
- private ownership and operation often with regulation;
- community and user provision.

(Kessides, 1993a).

Possibilities for pro-poor intervention are generally focused on community based provision, with simple, low-cost technology often proposed as a solution. However, poverty and equity concerns are also relevant to the regulation and management of parastatal and private utilities, as well as to local level solutions. Private sector operators are driven by efficiency and profit, rather than equity concerns but regulation is needed to ensure the maintenance of facilities and safety standards, or that pricing and payment mechanisms do not discriminate unfairly against particular groups, for example. Public sector enterprises face similar pressures, although in theory they could be made more directly accountable to poverty and equity concerns (Sida, 1996).

Cottam (1997) argues that technological 'blueprints' for infrastructure provision (often linked to external finance and international tendering procedures) are now being supplemented by organisational blueprints which ignore local realities. She suggests the need for understanding of infrastructure provision from a socio-cultural and historical perspective, as well as a flexible approach to new institutions and to appropriate 'anti-poverty' interventions, drawing on a multiplicity of local forms of organisation, initiatives and resistance.

13.2 GENDER ISSUES IN MAINSTREAM DEBATES ON POVERTY AND INFRASTRUCTURE

Infrastructure planning and policy has been treated largely as a technical exercise, with, until recently, little attention to gender issues, or to wider social and environmental factors. However, the negative impact of some kinds of infrastructure development in terms of social, economic and environmental factors has led to greater attention to gender issues. Poverty issues are increasingly addressed, through greater attention to delivering low-cost infrastructure services for low-income groups with more emphasis on appropriate technologies. Closely linked to this is increasing emphasis on participatory goals in programme planning and implementation. It is now commonplace to refer to the need for (poor) women's participation in local-level infrastructure development projects, as one aspect of the wider requirement for community participation.[38]

Growing attention to gender issues in mainstream infrastructure provision is based on the identification of gender-differentiated preferences, roles and responsibilities and therefore, differentiated needs for services. Focusing more infrastructural investment on services used by and appropriate to women, will, it is hoped, reduce demands on women's time and/or improve their own or other household members' health and welfare, with significant poverty implications. Much of the literature categorises women as a separate, 'hard done by' category that warrants special attention in infrastructure provision.

The extent to which gender issues are taken on board varies depending on the nature of the service, the extent to which it is perceived to be closely associated with pre-existing gender roles or norms and to have positive social or environmental externalities. For example, water and sanitation services are often seen as 'female' activities and to have considerable potential health benefits. Thus, much work has been done to develop gender-sensitive policy and practice in this sector (see Baden, 1993, for a summary). In the energy sector, the benefits of improved energy facilities are often perceived in terms of time freed from collecting firewood (again, a 'women's' task) and, potentially, reallocated to other productive activities, as well as in terms of reductions in environmental degradation.

By contrast, interest in gender aspects of transportation is relatively new in development debates, and is concentrated on rural Africa, where it is seen as important in improving agricultural productivity and supply response, because of the predominance of women as rural producers and in agricultural marketing (Levy, 1991; World Bank 1994; Bryceson and Howe, 1993; Calvo, 1994a, 1994b; Barwell, 1996). Other sectors, such as telecommunications, have not yet been tackled from a gender (or poverty) perspective in developing countries.

[38] The issues raised by this emphasis on women's participation are addressed in the next section.

13.3. WHY A GENDER PERSPECTIVE IS IMPORTANT

13.3.1 Gendered roles, needs and preferences

Gender-based divisions of labour, as well as cultural norms and perceptions of security, are reflected in patterns of activity, behaviours and preferences, so that poor men and women may have very different priorities in terms of infrastructure development. Similarly, infrastructure development may have different significance for and impacts on men and women. For infrastructure facilities and services to be effective, users must be differentiated on the basis of gender and other social factors.

For instance, men and women may have different preferences regarding sanitation facilities, and they often have varying roles in household hygiene management. Women are generally more concerned with privacy and safety, and so well-enclosed latrines in or near the house may be a higher priority for them than for men (IRC, 1994). In a project in El Salvador women would not use the toilets designed by male engineers because a gap left at the bottom of the door exposed their feet and offended notions of privacy (IWTC 1982 cited by Moser, 1987).

There are considerable differences between the travel patterns of men and women, (although current travel patterns may not reflect actual needs) (Turner and Fouracre, 1993; Levy, 1991). Evidence from village level travel and transport surveys (VLTTS) and case studies in Africa showed that the major part of the household transport burden falls on women, who contribute to 65 per cent of the total transport effort related to agriculture, although their involvement in the latter is seasonal (Barwell, 1996). An urban study in Brazil (Schmink, 1982 cited by Turner and Fouracre, 1993) showed that women's trips to work accounted for one-third of all work-related trips, while women were responsible for at least half the non-work trips. Other studies suggest that women are more likely than men to combine several purposes into one trip (trip chaining). A study of a resettlement scheme in Delhi showed that the ability of women to get to work from new locations was disproportionately affected compared to that of men, suggesting that women's travel patterns had not been considered.

13.3.2 Gender differences in access to and control of infrastructure facilities and services

Current patterns of activity, however, are not always desirable and gender divisions may be reinforced by inappropriate infrastructure provision. Research suggests that there is differentiated access to, use of and control over infrastructure facilities and services by men and women, linked to inequalities in intra-household relations, property rights and cultural restrictions (Doran, 1990). Bryceson and Howe (1993) point out that infrastructure development tends to assume that infrastructure improvement and introduction are key to alleviating transport problems. Yet in reality some attention needs to be paid to households' internal management of infrastructure and issues of control and access.

Women are suppliers of transport in terms of porterage; and as owners of both motorised and non-motorised transport. However, they are under-represented in the operation of transport technology, not as active as men as commercial drivers, nor in the operation of hand pulled trucks (Amponsah, *et al*, 1996). In Africa, load bearing is primarily the responsibility of women, as well as girl children (Agarwal *et al*, 1994). Women perform the function of transporting goods without the assistance of technology; men typically do so with the aid of technology (*ibid.*). Surveys on the impact of

intermediate means of transport (IMT)[39] in sub Saharan Africa (SSA) show that, in general, there is a reluctance by men to allow IMT to be used for 'women's work' (Barwell, 1996).

Access to infrastructure is often determined or influenced by gender -based constraints such as cultural restrictions which can constrain women's use of roads, or mobility as in the case of Nepal where women are restricted from travelling long distances by cultural norms. Cultural norms may also restrict women from using public transport, riding bicycles, or obtaining instruction licences for vehicles. Petty traders in urban Ghana (among whom the majority are low income women) face harassment or obstacles to their use of bicycles as a means of transport, even though this might save time and income (Amponsah *et al*, 1996):

> Women cyclists talked of the abuse they experienced from motorists. They told of being deliberately pushed off the road by vehicles, of being shouted and hooted at and of being jeered at and ridiculed for daring to bicycle on a public road (*ibid:* 4).

It has been observed that many women will avoid any attempt to board a heavily loaded bus, preferring to wait for another. Sexual harassment, height of entry steps, or the absence of a rail present particular problems to some women e.g. sari wearers.

In some areas where cost recovery schemes have been introduced, rates of recovery have been low, partly because affordability studies based on men's incomes have often ignored the possibility that women pay for a substantial portion of water costs. The introduction of cost recovery has led to certain households, particularly female headed households (FHH), being excluded from access because fees are set too high (Green with Baden, 1994). In male headed households, women might be willing to pay for infrastructure services, but because of patriarchal decision making processes or biases in intra-household resource allocation, may be unable to commit resources to such an investment (*ibid.*).

Women's relatively weak property and tenure rights over housing and land mean that they face barriers in securing access to land for building; that the benefits of infrastructure improvements which increase the value of property may not accrue directly to them; or that loans for infrastructure improvements are harder for women to secure in their own right.

[39] IMT are those means of transport which are intermediate between the traditional mode of walking and modern convention vehicles, i.e.wheelbarrows, animal drawn carts, bicycles.

13.3.3 Time use, productivity and social or environmental externalities

The heavy demands on women's time and energy of domestic transport requirements (e.g. for fuel and water collection, childcare) or maintenance tasks which result from lack of investment in appropriate infrastructure provision, have consequences for personal and household welfare. Domestic transport (for which women are largely responsible - see Table 1) accounted for 31-63 percent of total time spent on travel and 38-90 percent of energy, in four studies in Africa. Women are also involved in other transport activities, e.g. in headloading agricultural produce. In total, women account for 65 percent of all transport activities in the rural household, measured in time, increasing to 66-84 percent when measured in effort (Calvo, 1994a: 7-9).

In poor households, the 'trade off' between income earning activities and domestic activity for women may mean increased health risks, or using children's labour (often girls') to substitute for mothers. This was found in urban Ghana where girls' schooling was jeopardised by mothers' using them to transport goods for trading, so as to avoid long delays which might disrupt their sales (Turner and Kwakye, 1996).

Table 1: Division of transport responsibilities in a typical household (percentage)

	Ghana			*Zambia*		
	F	*M*	*O*[40]	*F*	*M*	*O*
Domestic transport						
Time	70	6	24	96	1	3
Effort	71	6	23	96	1	3
Total transport						
Time	63	24	13	66		
Effort	66	19	15	72		

Source: adapted from Calvo, 1994a: 10.

Conversely, appropriate infrastructure provision may release women from time-consuming tasks, which can then be invested in economic or socially beneficial activities. There is considerable evidence of time savings from improved infrastructure provision. However, Kaminga (1991 cited by Green with Baden, 1994) points out that there may be a tendency to overestimate the benefits to women of improved water supplies and to underestimate their costs. The assumption that time is saved does not always hold. In particular, where community management of water is conceived as women's responsibility, time spent collecting water may be replaced by time spent collecting school fees or attending meetings.

As yet, few empirical studies exist to demonstrate the gains in terms **of alternative uses of women's time, or social externalities** from investments in infrastructural improvements, e.g. water and sanitation (see e.g. Calvo, 1994a: 48-9; Barwell, 1996: 29-30). These benefits may require additional support in order to be realised, e.g. credit or access to markets for income generating activities, or health education: 'simply providing new [water] facilities does not necessarily lead to changes in usage or practices which lead to improved health' (Baden, 1993:1). In some instances, women may, understandably, choose more leisure time, rather than additional work.

[40] The category 'O' meaning other, stands for any mixed combinations of men and women, including children.

13.3.4 Biases in infrastructure planning, management and employment

A gender analysis of infrastructure services is important to understand how assumptions about gender run through each stage of infrastructure planning and to appreciate how this may result in the creation of infrastructure facilities and provision of services that fail to meet the needs of women in poor communities. Biases in infrastructure planning and development in part related to the lack of involvement of women in planning processes, either in technical or managerial roles, or through consultation processes.

The bias towards mobility rather than accessibility evidenced in the data collection and performance evaluation methods used throughout transport planning, tends to favour certain forms of transport provision. Planning for mobility enhances gender biases in that it tends to focus attention on improving the conditions of those who are likely to be more mobile already i.e. vehicle owners, who are more likely to be male.

Until recently, infrastructure provision, in general, has been dominated by top-down planning focusing on technical goals. This has in some cases resulted in infrastructure provision totally inappropriate to the needs of the poor - needs which are based on a range of factors at the individual, household and community levels. Beall (1997), drawing on research into waste management in South Asia, suggests that the micro-politics of the household and residential waste management need to be recognised in policy formulation and planning. This will both make management more effective and create a stronger anti-poverty focus in urban services management.

Examples of design faults and inappropriate technical choices ignoring gendered needs have been highlighted by feminist critiques. Moser (1987) points out that 'women's work can be adversely affected by the introduction of services totally inappropriate to their needs, as a result of lack of prior consultation'. For example, water pumps introduced to provide clean water have broken down because handles were designed for use by men, and women and children (the principal water bearers in the community) broke them through their inability to operate them. Similarly, ignoring the importance women place on safety, security and privacy may result in inappropriate infrastructure provision.

Labour-intensive forms of infrastructure construction have been linked to employment creation (and thus poverty reduction), but often do not offer the same opportunities and benefits to women and men (UNCHS, 1990; Turner and Fouracre, 1993; Levy 1991). The available statistics confirm that women in Latin America and SSA play a small part in the formal construction industry while their counterparts in Asian countries play a considerably larger role[41] (ILO, 1996). However, women's labour contribution to the formal construction sector may be channelled through the family or community, and is concentrated in the informal sector, so that official data tend to under-estimate their involvement.

Explanations for gender biases in construction range from patriarchal culture/attitudes, exclusion from training[42], the nature of construction work, the work environment etc. (Shah, 1993; Menendez, 1991). The development of formal construction trade training, initially through apprenticeship and later through modern vocational training programmes has usually reinforced the

[41] For instance, in South Asia women labourers are employed in road construction and maintenance. In one of Bangladesh's main road maintenance programmes, women comprised the bulk of the workforce (World Bank, 1994).
[42] In Jamaica, for instance, over 1,000 women were trained in building skills between 1976 and 1980 when the educational system was based on co-educational facilities. When the policy was changed in 1981 to centralized single-sex residential training, women were effectively excluded from training in the building trade.

exclusion of women from the direct income benefits that construction work generates (UNCHS, 1990).

Women's involvement in the construction industry is further constrained by sexual segmentation in the labour force. Wells (1990) points out that women are more likely to be employed in clerical categories, occupying low positions, while men are concentrated in production-related tasks, and in technical and managerial positions. In India, women in the construction industry are employed mainly as unskilled workers and restricted to manual work. Slotted into the category of 'helpers', their work mostly involves carrying headloads of construction materials (earth, mortar, bricks, cement etc.). The more skilled and highly rewarded work is carried out by men (*ibid.*). There is little opportunity for the advancement of women from helpers to other levels. In Bangladesh, women from different socio-economic groups sometimes occupy positions as engineers and architects, but they are few. However, this pattern is not uniform: Wells (*ibid.*) finds that Thailand, Bangladesh, Sri Lanka, Indonesia and Korea have more than 50 percent female employees in production-related jobs.

In general women's average wages in construction are lower than men's, partly due to sex-segregation. A number of surveys of employment conditions within the industry also suggest that women manual workers are paid less in **similar** positions to men (Sabha, 1987; Sinha *et al*, 1975; Fernando, 1985 cited by Wells, 1990; Shah, 1992).

With the increasing recognition of significant gender differences in requirements of shelter and access, more attention is being paid to women's participation in public sector building. Another area of potential employment or income generation for women is in the manufacture of building materials. Similarly, female participation in public works is now recognised as an important means to reduce poverty.

Increased involvement of women in construction does not always bring financial benefits and in some cases places more burdens on women. A road maintenance programme in Lesotho paid women for their maintenance work only in food, perceiving them in their reproductive role. Programmes which rely on unpaid community participation often expect women to provide voluntary labour. In self-help housing projects, or public works schemes, women are often relegated to 'secondary chores' such as carrying water, wetting bricks, mixing mortar, or tidying verges (Wells, 1990).

13.3.5 Community participation

Community participation tends to assume a homogeneity of community interests, but communities have socially differentiated interests determined by gender, class, age, ethnicity etc. Community participation does not necessary translate into women's participation. There are several inter-related factors that can lead to gender-based disincentives to participate in project activities. Dhanapala (1995) study of the gender-differentiated impact of village-level micro-hydro technology in Sri Lanka found that institutional problems and conflicts, leadership styles and attitudes to women, the economic role and activities of women, and lack of household support in subsistence activities were some of the factors hindering women's participation in infrastructure projects.

Where community participation is seen as a formal process (e.g. involving water committees or NGO facilitation) this can lead to the exclusion of women, who may have dominated less formal, pre-existing networks, as Cottam found in low income areas of Lusaka (1997: 74).

13.4 IMPLICATIONS FOR POLICY AND PRACTICE

13.4.1 Towards gender sensitive infrastructure services

The demand orientation of new approaches to infrastructure policy implies that infrastructure services provision will be more responsive to consumers or users. While this may have more scope for redressing gender imbalances, there is the danger of introducing new forms of gender bias. The delivery of infrastructure services requires gender-sensitive policies and strategies at macro- and micro-levels. Infrastructure planning requires sectoral and cross-sectoral linkages that take gender issues into consideration. Gender considerations need to be placed at the core of key infrastructure policy debates which revolve around: ownership; financing; decentralisation; equity versus efficiency goals; formal versus informal provision and choice of technology.

Sectoral investment programmes (SIPs) related to infrastructure development (e.g. in transport, for example in Tanzania) are now being promoted (particularly by the World Bank) to improve donor co-ordination, local ownership, and provide more comprehensive coverage (World Bank, 1995). This implies a shift away from direct involvement in projects, to broader policy concerns, including regulation, management systems, human resources development. It is important that gender issues are taken into account in the ways that sectors are defined (e.g. the inclusion of transport for domestic purposes and consideration of travel needs in women's activity patterns); that systematic mechanisms for monitoring gender and other social impacts of infrastructure provision are developed; and that training and employment opportunities for women are promoted, not just in manual and low grade jobs, but also in technical and management grades.

Box 2: World Bank support to non-motorised transport (NMT) in urban Ghana.

Increases in the costs of public transport following privatisation and poor levels of infrastructure development in low income areas are factors behind the Ghana Urban Transport project in Accra. The project has two main components, designed to alleviate the burden of personal and commercial transport costs to the poor, through:

- improved access to depressed areas in Accra;
- construction of appropriate infrastructure to facilitate NMT, particularly bicycles.

However, obstacles have been identified to the benefits of these activities for women because of negative attitudes (highlighted above) towards women's use of bicycles. In the long-term, the project is attempting to counter these attitudes and strengthen the capacity of the Department of Urban Transport to address gender barriers to women's use of NMT.

Source: Amponsah *et al*. (1997: 5-6)

The consequences of infrastructure delivery need to be fully considered since men's and women's interests and needs differ. Plans for introduction of new technology for water conservation, road construction etc. should be informed by findings of the increasing literature on technological change and gender. Predicting the impact of infrastructure on women and men requires a close understanding of the details of their activities, opportunities and constraints, as Box 2 on the Urban Transport Project in Accra illustrates (World Bank, 1994).

For example, new road networks may create opportunities for women to exploit new markets, or may lead to an influx of cheaper products without creating alternative economic alternatives, dislocating their trade. Collecting gender-disaggregated data to assess the likely impact of new

infrastructure may avoid reproducing gender biases. Consulting both men and women and promoting their participation in new infrastructure development is vital to ensuring that new facilities and services are appropriate to their different needs (ECFA/JDI, 1993).

Bilateral and multilateral programmes aimed at housing and basic services are paying more attention to the needs and priorities of women. Sida, Norad and ODA[43] are cited as examples of bilateral donors focusing on the needs of women in infrastructure provision (UNCHS, 1996; ECFA/JDI, 1993). Lessons can be learned from the experience of attempts to promote gender sensitive approaches in sectors such as water and sanitation. Van Wijk (1993) (cited by IRC, 1994) argues that effective strategies are gender-specific in that they recognise existing and new roles for men and women. Actual divisions are much less sharp and more fluid in times of change. She distinguishes nine areas where a gender approach can be fruitful (see Box 3).

Box 3: Gender-sensitive strategies for water and sanitation provision

* Contacting women in needs assessment, because sanitation is more urgent for them.
* Consulting men and women on the choice of acceptable and affordable technologies
* Giving both genders a say in the design and location of facilities
* Involving men and women in construction and financing, because the expertise of men and women in these areas differ and conditions differ for married women and female household heads
* Dividing work in construction and maintenance of sanitation facilities equitably between men and women, boys and girls
* Ensuring that women can also get technical training, as the acceptability of their presence in private compounds and their commitment to the work makes them excellent sanitation workers e.g. in Lesotho, India and Pakistan
* Involving men and women in health education, as sanitation projects will not succeed without their support and behavioural change
* Ensuring that men and women can participate in sanitation improvements
* Measuring change in sanitary behaviour of men and women

13.4.2 Managing infrastructure, employment and training needs

The emphasis on institutions, community participation, improved management and financing structures may have potential for more recognition of women's needs and interests. For example, the focus of new policy on decentralisation and participation in water resources management 'implies increased sensitivity to local conditions and priorities thus the possibility for greater user involvement and influence over the planning and design of new services, with potential benefits. However, this depends on the extent to which a gender analysis is applied' (Green with Baden, 1994).

The decentralisation of the management of infrastructure services requires educating and training staff at all levels and ensuring that women participate equally in education and training programmes. Representation of women among decision-makers and policy makers of public and private sector construction sectors may eliminate barriers to women's entrance to other levels of the sector. Anecdotal evidence suggests that there is general consensus that the appointment of women project managers will contribute to improvements in both project performance and the situation of women

[43] Now the Department for International Development (DFID).

workers who are employed in the construction industry (Shah, 1993). In the field, agencies such as Sida and DGIS are attempting to introduce gender-sensitive policies and employment practices in parastatal newly privatised utilities, such as electricity and water companies, for example, in Mozambique. This includes emphasis on the representation of women among technical and managerial staff, and on training opportunities for women employees, as well as gender training for personnel at all levels (Ann Pedersen, Mieke Oldenburgh, personal communication).

The type of training or the way it is carried out may affect women's ability to take on paid employment. In Grenada, a lower entry qualification disadvantaged women when it came to seeking employment (see Box 4). Even in cases where women have access to appropriate training they may fail to find employment opportunities because of stereotypical attitudes. Further support in securing employment may be required as in the case of Jamaica (see Box 4).

Box 4: Building-related training and employment for women

In 1987, in Grenada, unemployed women were encouraged to attend a non-traditional employment preparedness training programme where women were introduced to different kinds of non-traditional work for women, including the building trade. This gave them time to explore within a supportive environment, some of the issues related to women's entry in non-traditional areas.

However, a further initiative had mixed consequences. Women who did not have the academic qualifications to be eligible for building-related courses were encouraged to attend special women's only training course. This gave them the opportunity to catch up with men, but put them at a disadvantage because it was widely known that entry-level standards were lower.

In Jamaica, the Women's Construction Collective (WCC) in 1983 was set up to help women find employment at the trade level in the building industry. Low-income women were trained by the Collective in basic building skills and carpentry. The tools necessary to start work were provided through a revolving-loan fund. Contractors initially employed the women as labourers, but, because they were highly trained and had their own tools, most were soon promoted to being trade helpers.

Source: UNCHS, 1990.

Experience suggests that training is not enough. It must be accompanied with plans to provide employment, or provide women help to secure employment, as well as other measures to ensure that women are provided with the facilities that they need in order to enable them to work in the industry (Wells, 1990). Women need to be paid whilst training, and during the construction of their homes. Special assistance with childcare, family pressures, and support in dealing with attitudes of male workers is also required. Andersson (1991) proposes management and entrepreneurship training to encourage self-employment.

13.4.3 Financing infrastructure services

The costs to women of new infrastructure services may be alleviated somewhat if appropriate supports (e.g. credit) are made available. Increasing the incomes of the poor (women) through income generating activities may also enhance their ability to demand and pay for infrastructure services.

However, gender biases in access to finance (see Box 5) and in property rights are structural barriers to women's ability to pay for the infrastructure services they need. These barriers may be

exacerbated with the development of private land markets. Housing schemes and community based infrastructure projects need to consider ways to promote women's rights over household and community assets, by registering properties in women's names, or encouraging women's groups to register titles to land for infrastructure development, for example.

Box 5: Financing home improvements

In Lusaka, Zambia, it was found that because of their low incomes women benefited more from squatter upgrading projects than from sites and services projects. Women were more willing to spend on housing than men, but fewer women qualified for loans because the criteria were based on average incomes and women tended to fall in the lowest income category. Women were found to be more responsive in paying arrears for housing loans and plot charges. However, it was difficult for women to travel the long distances required to make the payments, and the business hours conflicted with other demands on their time at work and in the household. Women showed better repayment rates than men on several low-income credit programmes.

In Zimbabwe, sites and services projects have benefited more women than in Zambia, but the proportion of female heads of households qualifying is still low. While sites and services schemes with public sector credit provision enabled more women with informal sector income to qualify, the gain has been eroded because of the transition to private sector (building society) credit, where more rigorous proof of income is required

Source: Menendez, 1991

13.4.4 Enhancing women's participation in infrastructure development

A gender approach emphasises the need for both women and men to participate in decisions and functions at different levels. Additional measures for increasing women's involvement in providing infrastructure may be necessary. However, special attention to women may strongly opposed by men.

In a rural water project in Zambia, men were jealous of women's preferential access to training courses. They in turn tried to prevent the participation of women. In Laikipia, a semi-arid region in Kenya, 24 women's groups built more than 600 rainwater tanks in four years. Before the project started the women's groups were studied. A participatory assessment showed that women could not travel for group training, and that men would take over any mixed project associated with influence and income. The project subsequently limited its intervention to promotion and on-site training to women's groups (Fernando, 1996). Box 6, on the Feeder Roads Programme in Mozambique, suggests that a series of measures are needed to promote female participation in road construction, starting with the recruitment process.

Box 6: Increasing women's participation in road building in Mozambique

The Feeder Roads Programme (FRP) in Mozambique set a target for the participation of women in road construction and maintenance of 25 percent but consistently failed to achieve this. A review was commissioned to examine barriers to female participation and suggest measures to counter these. Among the barriers identified were:

- recruitment processes controlled by men
- lack of women in supervisory positions
- information about employment opportunities not channelled through media accessible to women
- work involved staying on camps with few facilities, no health care, far from markets to buy or sell food

Measures suggested to improve female participation included:

- improved outreach and consultation with women's groups in recruitment process
- hiring more women in supervisory positions
- provision of health and childcare facilities near worksites

As a result of the study, a gender advisor has been recruited to the Roads and Bridges Directorate of the Ministry of public works, who will have responsibility for monitoring the study's recommendations as well as for examining ways in which the Directorate can institutionalise its capacity to support gender-sensitive programmes.

Source: Baden, 1997, citing *Forum Mulher*, 1996

13.5. NEW DIRECTIONS FOR RESEARCH AND POLICY DEVELOPMENT

Greater attention is needed to the social and organisational aspects of infrastructure provision, particularly to intra-household processes and decision making which lead to gender divisions in use and control of infrastructure facilities and services.

More recognition is needed of the diverse organisational forms, often highly informal, involved in infrastructure services provision and management in poor communities and the ways in which gender, and other social divisions (e.g. caste, class) are represented in these.

Gender analysis could be brought to bear on those sub-sectors which have thus far received little attention in infrastructure development, e.g. telecommunications, with particular attention to questions of access, activity patterns and time use and potential income generating effects in low income households.

Comparative study of gendered cultural norms relating to infrastructure/ technology use might shed light on ways to counter the negative effects of these on women's access.

A review of explicit and implicit criteria applied in prioritising and evaluating infrastructure development interventions, would assist in identifying areas of gender bias and/or where additional/alternative criteria or systems could be introduced.

Mechanisms for ensuring the accountability of private sector operators to low income (and particularly women) users of infrastructure need to be explored.

Gender, economic reform and poverty

by Sally Baden

ACRONYMS

CEEWA	Council for the Economic Empowerment of Women in Africa
CIDA	Canadian International Development Agency
EC	European Commission
EGS	Employment Guarantee Scheme (Maharashtra)
ESAF	Enhanced Structural Adjustment Facility
ESF	Emergency Social Fund (Bolivia)
FHH	Female headed household
IBRD	World Bank
IFIs	International financial institutions
IFPRI	International Food Policy Research Institute
IMF	International Monetary Fund
NBFI	Non-bank financial institution
NGO	Non-government organisation
PAIT	Programme of Temporary Income Support
PAMSCAD	Programme to Mitigate the Social Costs of Adjustment (Ghana)
PEM	Minimum Employment Programme (Chile)
PER	Public Expenditure Review
PFP	Policy Framework Paper (World Bank)
POJH	Occupational Programme for Heads of Households (Chile)
PUSH	Programme for Urban Self-Help (Zambia)
SAGA	Structural Adjustment and Gender in Africa
SAP	Structural Adjustment Programme
SPA	Special Programme of Assistance for Africa
SRF	Social Recovery Fund (Zambia)
UNICEF	United Nations Children's Fund

14.1. ECONOMIC REFORM AND POVERTY

14.1.1 Economic reform programmes and poverty trends

In many developing countries, economic reform has been closely associated with structural adjustment packages, promoted by the International Financial Institutions, (IFIs - i.e. the IMF and World Bank) in conjunction with lending programmes. In Sub-Saharan Africa and Latin America, particularly, SAPs have dominated economic policy making in the 1980s and early 1990s. Some East Asian countries (Philippines, Indonesia, Malaysia) have also undergone processes of adjustment and, more recently, South Asian countries (India, Pakistan, Bangladesh). The experience of structural adjustment is highly varied, although broadly, in Asia, it has been associated with continuing growth, while in Latin America and particularly Africa, it has been associated with negative growth and increasing poverty. There are a number of exceptions to these overall trends.

Early discussions of structural adjustment were principally concerned with short term stabilisation and macro-economic aggregates and beyond this with removing distortions and increasing economic efficiency. It was only in 1987, with the publication of UNICEF's **Adjustment with a Human Face** (Cornia *et al*, 1987), that the debate on poverty and adjustment gained some prominence. Since then, a considerable theoretical, empirical and policy-oriented literature has developed on this topic (Demery and Squire, 1996; Killick, 1995; Stewart, 1995).

The IFIs have, by and large, tended to disassociate poverty in adjusting countries with adjustment policies, arguing that either pre-adjustment economic crises or government policies (linked to vested interests and lack of political will) are mainly responsible for increases in poverty or the failure to address poverty. Adjustment policies, it is argued, would improve the situation of the poor in the longer term, through labour-intensive growth and providing new opportunities and increased incomes for the poor, especially in rural areas. To the extent that adjustment had a negative social impact, it perceived to be temporary, and concentrated in urban areas.

In recent years, however, it has become evident that the poverty in countries undergoing economic reform is not temporary in nature. Moreover, there is considerable evidence that adjustment policies themselves have contributed to increasing poverty. Growth has not occurred as fast or as much as predicted in adjusting economies, and, where it has occurred, it has not, in general, been 'pro-poor,' i.e. has tended to benefit higher income groups more. Not only has adjustment often been associated with worsening income distribution, but the majority of adjusting countries have also seen increases in levels of absolute poverty. Trends in social indicators have been more mixed, with infant and child mortality rates often continuing to fall, but in some places, educational enrolment has fallen and maternal mortality rates have worsened (Stewart, 1995).

Killick (1995) finds evidence on poverty is mixed: in some countries there has been a fall (e.g. Indonesia, Malaysia), in others results are mixed (e.g. Chile, where income distributive effects of reform are regressive but targeted programmes have been effective in reducing absolute poverty) and in others, adjustment is associated with increases in poverty (e.g. Malawi). Those countries that have done relatively well, under adjustment, are the East Asian and middle income heavily indebted countries, which are now recovering. The urban working poor are especially vulnerable under adjustment, through prices rises, increased indirect taxation, job losses, and reduced real wages. However, the poor, especially in rural areas, can benefit from adjustment and any impact, positive or negative, is more likely to affect the poor than the very poor, who are weakly integrated. Benefits to

the poor depend on such factors as land distribution and on the proportion of cash crops being produced by small holders.

14.1.2 Changes in policy to address poverty concerns

Since the late 1980s, the IFIs have acknowledged the need to reconsider adjustment policies in the light of poverty reduction concerns. The core of the World Bank's approach to poverty reduction - set out in the **World Development Report** of 1990 - is the promotion of labour intensive growth, investment in basic services (health, education) and the provision of safety nets (or targeted schemes to assist the vulnerable). These objectives are reflected in changes in approaches to adjustment in the early 1990s, with increased emphasis on expenditure switching, rather than deflation; greater flexibility about the timing and phasing of subsidy removals and price reform (e.g. allowing food or fuel subsidies to remain in place after devaluation); reallocation of social investment towards basic services used by the poor (e.g. primary education and health care systems); and the development of compensatory programmes, mainly employment schemes or social funds, in conjunction with reform programmes, rather than as an afterthought. Other measures include a requirement that policy framework papers (PFPs) and country assessments contain an analysis of poverty issues, as well as an increase in research and data gathering on poverty issues, at country level (i.e. through poverty assessments), sectorally and through cross country analyses.

Eighteen of 32 programmes in 1992, and six of 17 adjustment programmes in 1993 included specific measures to protect the poor (World Bank, 1993, cited in Haddad *et al*, 1995). Specifically, an increase in the number of programmes with conditionalities relating to social spending, from under five percent in 1984-6 to 30 percent in 1990-2, is reported (based on the Bank's own data - others claim the increase is a more modest, from three to six percent) (Killick, 1995: 320-321).

The extent to which these changes have made an impact is unclear. The limited evidence is not encouraging but perhaps there has been insufficient time for changes in policy emphasis to make a significant impact. In the 1980s, adjusting countries' spending on the social sector and priority to pro-poor services worsened compared to non-adjusting countries, in part because of stronger pressure to meet debt service obligations of the former (Stewart, 1995). Social programmes introduced in conjunction with adjustment programmes have reached only a small percentage of the potential target group, and were more often used as political tools - see Box 1 for more details). While some progress is reporting in including poverty (and gender) concerns in adjustment documents, there is 'no evidence that poverty and gender sensitivity is applied to the formulation of macro-economic stabilisation policies' (Foster and Lee, 1996: 7). Even where poverty assessments have been done, these are not carried through into recommendations to change economic policy (*ibid.*).

Box 1: Limited impact of social safety nets on poverty

The impact of safety nets on poverty has been slight and patchy, in most cases, due to the widespread nature of structural poverty and the limitations of a project approach in addressing this. (Vivien, 1995). Political objectives have tended to dominate, by favouring schemes with high visibility rather than poverty reducing impact, or attempting to 'buy off' vocal opposition groups. Demand led schemes have tended to benefit better off groups who are already organised, who often have limited outreach to the poor.

'Social Funds introduced in the context of adjustment reached only a small fraction of the poor,' (Stewart and van Geest, 1995: 126). In Ghana, 0.3 percent of the total population were reached and only five percent of retrenched workers; in Egypt, 0.5 percent of the total population benefited; in Honduras, 13 percent, and in Mexico, a more impressive 27 percent. (*Ibid*; Graham, 1994) In Zimbabwe, only 26 percent of the urban poor who were targeted with food subsidies were reached.

Economic reform policies clearly still need considerable rethinking if poverty is to be reduced and more action is required, in the form, e.g. of greater emphasis on poverty in policy dialogue and the closer integration of poverty strategies with adjustment programmes. Economic policies are needed which limit the costs of adjustment. Some measures such as user charges for health and education have clearly had damaging effects on low income groups and therefore need to be reviewed (Killick, 1995; Stewart, 1995). There is a need for reform to social security systems to address poverty issues, rather than a reliance on often ineffective safety nets (Graham, 1994).

14.2. GENDER IN MAINSTREAM DEBATES ON ECONOMIC REFORM AND POVERTY

In the literature on poverty and adjustment (reviewed above) there is still a tendency to ignore gender (and other) aspects of vulnerability and to treat the poor as a homogenous and passive category (e.g. Stewart, 1995). The World Bank's own poverty assessments have, until recently, paid very little attention to gender issues (Hamner *et al,* 1996).

Where 'the poor' are further disaggregated, it tends to be by rural-urban residence, or by degree of poverty (e.g. destitute or extreme poor versus absolute poor), or sector of activity, so that gender aspects of poverty are rarely visible. There are also distinctions made between the 'new' and 'old' poor (the former being those who have been impoverished under adjustment). Where reference is made to gender issues, it is usually by singling out female-headed households as a vulnerable group, requiring targeted assistance.

Initially, concern with gender issues in relation to economic liberalisation and adjustment, emerged as a sub-set of the debates on poverty referred to in 2.1. Poor women were seen to carry the major burden of adjustment through increased demands on their reproductive labour, as well as falling social services provision, an argument first advanced in UNICEF's **Invisible Adjustment**, (1988) mainly in the context of urban Latin America.

The Commonwealth Secretariat's two volume study **Engendering Adjustment** (1989; 1991) argued that women bear the major burden of adjustment, in their four 'roles' as producers, mothers, home managers and community organisers. A 'pincer' effect, added to the pressure for women to earn market incomes, at the same time as increasing their reproductive burden, through decreasing social services provision and community infrastructure and by increasing household labour requirements, e.g. the need to prepare cheaper foods.

These studies, while they set out an initial agenda for looking at the impact of adjustment on women, were not persuasive, because they lacked the backing of rigorous empirical studies and tended not to address the impact of adjustment on men, or gender relations. There is still considerable disagreement as to whether it is adjustment policies which have negatively affected women, or the pre-existing conditions (Moghadam, 1997; Haddad *et al,* 1995). More recent arguments for consideration of gender in structural adjustment have focused on efficiency questions (Elson, 1991; 1993; Palmer, 1991), and it is these perspectives that have proved influential in mainstream policy debates because they have drawn attention to the possibility that unequal gender relations may underlie some of the poor performance of adjusting economies (see e.g. Blackden, 1993).

A few more rigorous quantitative empirical studies which have attempted to look at the gender differential impact of adjustment on poverty using household survey data (see Box 2). However, these have tended to focus on comparisons of male- and female headed households, in part because of data limitations. While these provide a certain amount of insight, including some counterintuitive findings, they do not provide a comprehensive view of gender and poverty questions related to adjustment, since the majority of women live in male headed households.

Box 2: Female headship, poverty and adjustment in Dominican Republic and Ghana

Data presented Haddad *et al* (1995) shows that the proportion of female headed households who were poor decreased in the period 1986-92, in the Dominican Republic while that of male headed households grew. Similarly, the percentage of female headed households among the poor in rural Ghana is thought to have declined after adjustment. These improvements related to, respectively, the rapid expansion of export manufacturing after 1988 in Dominican Republic and the access of women to land and labour for independent farming in Ghana. However, crude comparisons of male and female headed households may overlook: differentiation within these categories (e.g. between female heads), the longer working hours of female heads of household and the sensitivity of measures of poverty to gender differences.

A series of measures have been taken by the World Bank and donor agencies in the last two to three years, in part stimulated by external pressure from NGOs as well as researchers, to give a higher profile to the gender differentiated impacts of economic policy reform and to modify policies on this basis. These include setting up a consultative group, with international representation, to monitor progress on gender issues and propose reforms to the Bank; the piloting of 'gender-aware' adjustment missions in Mali, Mozambique and Burkina Faso (see section 5); and sponsoring research (notably the SAGA programme's three country study, and major study of gender and adjustment in Tanzanian agriculture commissioned by the EC).

However, despite the fact that 'macro-economics is notoriously gender blind (but often biased)... other growth related policies such as public expenditure allocation, tax policy, deregulation/price liberalization and even privatization are all highly amenable to gender analysis...' (Foster and Lee: 7), few adjustment documents integrate such an analysis.

14.3 WHY IS GENDER IMPORTANT TO ECONOMIC REFORM AND POVERTY LINKAGES?

14.3.1 Gender, economic reform and vulnerability to poverty

Gender is a key determinant of vulnerability (others are, e.g. age, class, ethnicity, region etc.) so that in a periods of economic transition, women are likely to be especially vulnerable to increased poverty or insecurity. While job losses may affect men and women, women may find it harder than men to regain employment or become self employed, due to relative lack of education and skills, life cycle issues (employers may favour younger women) and lack of independent access to capital. Poor women are more likely to have no other adult earners in the household and to have a higher dependency ratio and may be especially vulnerable to the removal of subsidies and increasing charges for services and rising prices, leaving them in deepening poverty.

Box 3: Stabilisation, adjustment and poverty in Peru

A study of the impact of adjustment on women in urban Lima, using household survey and employment data found that, because of women's disadvantaged position in the labour market, in terms of poverty incidence and in education, they are likely to be more adversely affected by stabilisation and adjustment policies.

Specifically, rates of female headship are rising, associated with greater poverty (47.5 percent of female headed households poor compared to 43.5 percent of male headed households), higher dependency ratios and lower earnings. The loss of formal sector employment is affecting women who are likely to lose jobs first, or through increased competition in the informal sector, as unemployed men move in, forcing women to work longer hours to compete.

Source: Tanski, 1994

14.3.2 Poverty reducing effects of economic reform are mediated by gender relations

Poverty reducing benefits of economic reform may not reach women. For example, benefits to poor rural farmers from increased prices of cash crops accrue directly to men, but may have limited positive, or negative impacts for women, whose labour is intensified to increase production, but who are not always recompensed for this additional effort, as demonstrated in contrasting studies of sugar commercialisation in the Philippines and Kenya (Kennedy and Bouer cited in Haddad *et al*, 1995). In addition, reduced direct control over incomes undermines women's bargaining power in the household and influence over economic decision-making, as found with the intensification of traditional cash crops (e.g. tobacco) in Uganda (Elson and Evers, 1997).

Where women do benefit directly from economic reform and liberalisation, e.g. in the expansion of female intensive export manufacturing, through gaining access to the labour market for the first time, and earning a higher income than would be available in alternative forms of employment), these gains are often in the context of discriminatory practices in labour markets and often harsh working conditions (see e.g. Moghadam, 1997). Also, these benefits often do not accrue to poor women (those most likely to be employed are younger, more educated women) and are not always durable.

14.3.3 The supply response issue

A failure to consider the systemic barriers to increased production faced by women, in response to price incentives, may lead to over-optimistic assumptions about their impact (World Bank, 1996). A variety of interlocking, gender-related constraints, limit the extent to which women are willing, or able, to increase their output, or to market their increased output. These include time constraints, linked to the burden of reproductive labour, lack of command over productive resources (land, capital, labour) because of limited property rights, household power relations, and high market transactions costs as well as gender biases in marketing systems, and in the provision of associated marketing infrastructure (information, transport, storage, market facilities, credit) (Baden, 1997a, 1997b). The fact that women themselves often do not receive the benefits of their own increased production (see 4.2) is an additional constraint.

Time constraints are a major limiting factor for poor women, who cannot afford to hire in labour, and are occupied with meeting immediate survival needs. A recent study of farming households in Zambia showed that discrepancies in time use between men and women were particularly marked in subsistence level households[44]. In general, poor women are concentrated in low profit, petty trading segments of agricultural marketing, with high levels of competition and rates of wastage, often barely able to generate enough revenue to buy new stock and often buying on credit from suppliers on highly unfavourable terms. Higher up the marketing chain, the number of men increases.

14.3.4 Hidden costs, human development and intergenerational transfer of poverty

Often, the costs of economic transition are 'hidden' because they are absorbed by increases in poor women's unpaid labour, intensity of work, reduced nutrition or energy depletion. This has severe potential costs in terms of women's own health and well-being, and girls' education may suffer due to mothers' drawing heavily on girls' labour in informal sector activity, agricultural work, or in household work. For example, in Uganda, women and girls are employed in the production of non-traditional exports, such as vanilla, and seasonal peaks in demand for their labour were known to affect girls' school attendance (Elson and Evers, 1997). Hence a vicious cycle of poverty, whereby girls' future prospects are also limited, is set in train.

14.4.5 Gender biases in social programmes and social security systems

Safety nets tend to see women as targets for social assistance and men as targets for employment, based on a male breadwinner model. Their populist orientation and appeal to political support means that they often tend to reinforce 'family values'. Women benefit mainly from nutritional programmes. For example, in Bolivia, 99 percent of beneficiaries of the ESF were men. In Chile, the introduction of a new scheme (POJH) targeting (male) heads of household (women were 25-30 percent of beneficiaries), and which paid 40 percent of the minimum wage, led to the feminisation of a pre-existing programme (PEM), paying only one quarter of the minimum wage (Graham, 1994; Vivien, 1995).

Lack of gender policies, reliance on NGOs and other organisations to carry out projects, with no systematic monitoring, mean that social funds are ill equipped to address gender aspects of poverty. Moreover, participatory activities or community-based social provisioning in social programmes often rely on the unpaid labour of women.

[44] Data from Norad funded study of supply response in Zambia.

Some social programmes associated with economic reform packages have a poor record on women's participation because they have explicitly targeted the new poor, i.e. retrenched workers from privatised industries, more likely to be men; because of a male biased model of the breadwinner in either targeting or recruitment procedures; and/or because the design of programmes builds in barriers to female participation (e.g. project site a long way from the household, or markets, lack of child care facilities; heavy 'men's' work required, such as construction). Indirect beneficiaries of social programmes are often assumed to be household members of the main earner (by implication usually women and children), which fails to consider inequities in intra-household resource allocation. Some safety net programmes have been more successful in targeting poor women (see Box 4).

The benefits from social infrastructure provision through public works have a gender differential impact. Local community facilities (e.g. wells, schools, nurseries, sanitation provision etc.) are likely to be of much greater benefit to women, than, for example, roads, airport runways etc.).

Social safety nets by and large have not yet taken on gender issues (see above) and, more broadly, wider social security and welfare provisions have not taken account of changes in social relations (including gender relations) which are occurring as result of economic restructuring, as well as political and social conflict (Baud and Smyth, 1997; Moghadam, 1997). These include changes in patterns of household formation (such as later marriage, increased incidence of non-formal unions), dissolution (rising rates of abandonment, separation, divorce), and residence (living apart as a result of migration) as well as changes in intra-household expenditure patterns, due to unemployment, falling real wages, poverty and women's increased market earning capacity.

Box 4: Women's participation in safety net programmes

Some safety net programmes have been relatively successful in attracting women beneficiaries, e.g. PAIT in Peru, with 76 percent of beneficiaries women, and PUSH in Zambia, with 95 percent female beneficiaries. This is not without problems, however.

PAIT attracted many women because of the possibility of work near the home, but it also disrupted existing community kitchens or mother's clubs, because people dropped their responsibilities there. PAIT set up separate kitchens for workers rather than using existing facilities. (Graham, 1994: 101-3) 'Male female relations were affected by women having a salary for the first time; because the work was designed for men, women often suffered health problems (*ibid.*)'

The fact that PUSH required voluntary labour may be one explanation for the high level of involvement of women, as well as its focus on provision of sanitation facilities, which may be a higher priority for women than men.

14.4 IMPLICATIONS FOR POLICY AND PRACTICE

14.4.1 Incorporating gender concerns into design of economic reform

Gender aware economic policy making

A variety of tools are being developed to make economic policy and planning more gender sensitive. This includes, for example, macro-economic models which take account of women's unpaid labour and thus are able to factor this into attempts to predict the impact of policy reform (Cagatay *et al*, 1995). Public expenditure reviews (PERs) can incorporate a gender analysis. Underpinning these approaches is a need to refine methodologies, and improve the collection, analysis and use of gender disaggregated data for policy and planning.

Various initiatives have been taken to increase dialogue between finance ministries, other key sectoral ministries, and women's machineries, to promote the consideration of gender perspectives in economic policy formulation. The World Bank has piloted 'gender-aware' adjustment operations in three countries in Sub-Saharan Africa, attempting to ensure that gender-based constraints are taken into consideration when adjustment policies are being devised (see Box 5). Much work remains to be done in this area, so that these efforts are systematic

Box 5: Gender in the Special Programme of Assistance for Africa

The SAGA workshop in Ottawa, in November 1995, agreed a programme of work, of which key elements were:

- pilot 'gender-aware adjustment operations in three countries;
- fuller integration of priority structural issues in policy dialogue, namely, protection of core public expenditures, priority to girls' education and legal reform to tackle gender disparity.
- Under SPA 4, work continues on gender incidence analysis in public expenditure reviews, improved access to financial services for women; and increased participation (including of women) in the design, implementation and monitoring of economic reform in Africa.

World Bank, 1996

Increasing accountability of economic policy to (poor) women.

A second and equally important mechanism for incorporating gender concerns into the design of economic reform is to make the processes of economic policy more accountable to women and their organisations (e.g. through consulting with women's groups, economic literacy work, women's budget campaigns etc.). Examples of this approach include the work of CEEWA in Uganda, in lobbying for changes to economic legislation (the recent Financial Institutions Act 1993 and Bank of Uganda Statute 1993) enacted in the context of financial sector reform, to ensure that it does not institutionalise discrimination or biases against poor women who are the main beneficiaries of non-formal microenterprise finance (Kiggundu, forthcoming). The setting up of consultation mechanisms during the process of formulating economic policy is also important and, alongside this, raising gender issues during policy dialogue with governments.

14.4.2 Monitoring of gender-differentiated impacts

The gender disaggregated impacts of economic policies require monitoring to inform future policy development. One mechanism for this is gender sensitive incidence analysis of public expenditure (Demery, 1996). Women's budget exercises, notably that in South Africa which has gained

considerable support both within the Parliament and beyond, are also possible leverage mechanisms to raise awareness of the implications of public expenditure decisions, and trace through their impacts (Budlender, 1996). Other mechanisms are also required which institutionalise capacity for monitoring adjustment impacts, e.g. the collection of indicators via development programmes, social sector service provision or community based initiatives.

14.4.3 Reducing barriers to women's response to economic opportunities

A number of measures can be taken to reduce or remove the constraints to women's response to economic opportunities. Some of these relate to reducing the time burden on women, e.g. through improvements in the provision of social infrastructure, such as water supply, child care facilities etc. In order to improve direct returns to women's labour, there is a need to secure their property rights through legal reforms although these often have limited effectiveness at local level, unless women develop bargaining power to assert their claims.

Gender biases in financial and agricultural markets need to be tackled. In the financial sector, support to the development of non-bank financial institutions (NBFIs) which are successful in reducing transactions costs of lending to women, an emphasis on savings, as well as credit, to mobilise women's own resources, and the reform of banking institutions and legislation to remove discriminatory practices are all possible measures. The definition of financial instruments in legislation should be flexible to ensure that institutions lending to women are not negatively affected (Baden, 1997a).

Initiatives are needed to support women's trading include group loans for transport, storage etc. to women traders, measures to limit police harassment and excessive taxation of informal traders, and the provision of services which are located in areas where women trade (Baden, 1997b).

14.4.4 Social security and safety nets

There is now considerable experience of the gendered impact of safety nets and of measures which can be taken to ensure greater participation of women, such as decentralised location of work sites, near homes and markets, provision of child care and health facilities, use of women's networks to publicise schemes, improved recruitment practices, hiring of women in supervisory positions (BRIDGE, 1995). Programmes which specifically target female heads or women may have drawbacks in that they can institutionalise gender divisions of labour and discriminatory payment practices and, in some instances, create a political backlash.

There is a need for greater recognition of the increasing variety of household forms, and associated patterns of vulnerability, and a need to move away from the male breadwinner model underlying social security and welfare systems, as well as for legal and institutional changes which strengthen the rights of women in non-formal unions, or who are not living with, or supported by, male partners. At the same time, the coping strategies of poor women, as well as men, need to be better understood, and supported, as alternatives to top down provision of safety nets (Baud and Smyth, 1997).

14.5. DIRECTIONS FOR FURTHER RESEARCH

Useful conceptual frameworks are now in place which can assist understanding of the linkages between economic policy, gender and poverty concerns. There are also a number of initiatives which have attempted to influence policy in this area from a gender perspective. What is now needed is detailed context specific research, and comparative empirical research, which investigates how and whether policy changes take affect in implementation and links between macro level changes and micro level responses. Some areas are suggested below.

- Monitoring of extent to which incorporation of gender considerations at policy level in economic reform impacts on actual changes through budgetary allocations, investment, changing employment patterns and resource allocation to men/women

- Research on the linkages between economic policy and restructuring and changing household forms and relations, e.g. through changes in male/female participation rates, incomes and expenditure patterns and their effects on household relations.

- Research on how policies of trade and investment liberalisation impact on the gender intensity of the work force in different sectors, and on wage structures and working conditions. Parallel to this, research on the impact of labour legislation and labour standards provisions in redressing gender inequities in the labour force.

- Research on coping strategies in the face of insecurity caused by economic restructuring and policy changes, and the scope for improving social security provision.

- In agricultural and other product markets, analysis/ mapping of gender segmentation in marketing systems, to increase understanding of the different conditions faced by women and men in trading.

APPENDIX 1: Human rights guaranteed in main international treaties

- Right to self-determination
- Non-discrimination
- Prohibition of apartheid
- Right to effective remedy for violations
- Prohibition of retroactivity for criminal offences
- Prohibition of imprisonment for contractual obligations
- Right to procedural guarantees in criminal trials
- Right to life
- Right to physical and moral integrity
- Prohibition of torture and of cruel, inhuman or degrading treatment
- Prohibition of slavery, of forced labour and of trafficking in persons
- Right to recognition of legal personality
- Right to liberty and security
- Prohibition of arbitrary arrest, detention and exile
- Right to freedom of movement and residence
- Right to seek asylum
- Right to privacy
- Right to freedom of thought, conscience and religion
- Right to freedom of expression
- Right to freedom of peaceful assembly
- Right to freedom of association
- Right to marry and found a family
- Right to protection of motherhood and childhood
- Right to a nationality
- Right to work
- Right to food
- Right to social security
- Right to enjoy the highest standard of physical and mental health
- Right to education
- Right to participation in cultural life

source: Tomaševski, 1993

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