

# **Handbook for Mainstreaming – A Gender Perspective in the Rural Transportation Sector**

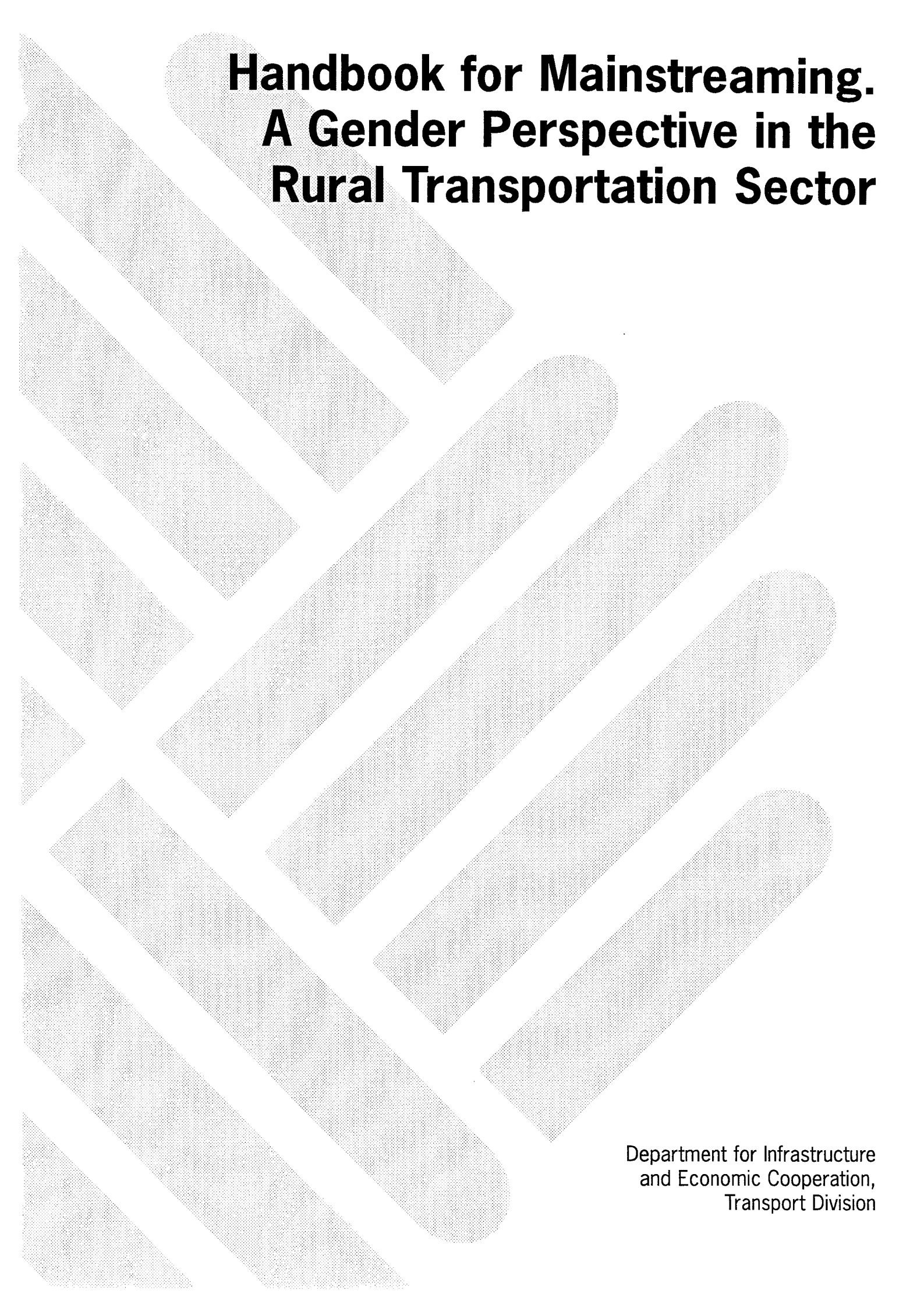


**Sida**

SWEDISH INTERNATIONAL DEVELOPMENT  
COOPERATION AGENCY

Department for Infrastructure  
and Economic Cooperation  
Transport Division



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# **Handbook for Mainstreaming. A Gender Perspective in the Rural Transportation Sector**

Department for Infrastructure  
and Economic Cooperation,  
Transport Division

This handbook has been developed for Sida by a team of consultants – Johanna Schalkwyk, Helen Thomas and Beth Woroniuk – in close consultation with the Transport Division and the Gender Equality Unit at Sida.

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SWEDISH INTERNATIONAL DEVELOPMENT COOPERATION AGENCY

S-105 25 Stockholm, Sweden

Phone: (+46) 8 698 50 00 Fax: (+46) 8 20 88 64

## Preface

In May 1996 the Swedish parliament established equality between women and men as an overall goal for Swedish development cooperation. The Action Programme for Gender Equality being developed by Sida focuses on a mainstreaming strategy which requires that a gender perspective is included in policy development, policy dialogue and development interventions.

Sida will support the development of new strategies and approaches to improve the focus on gender equality in relation to rural transport management and the environment in development co-operation policies and programmes.

Within the framework of infrastructure development there is a need to develop clearer understanding of the linkages between gender equality and rural transport management. Understanding why and how gender is important and relevant to transport issues is crucial for mainstreaming a gender perspective into development cooperation policies and programmes in this area. Development cooperation planners, administrators and consultants need assistance to identify and understand these linkages in order to carry out adequate sector analyses and to include a gender perspective in policy development and policy dialogue as well as in the planning and development of different types of support.

This handbook has been developed by Sida's Department for Infrastructure and Economic Cooperation in close collaboration with the Gender Equality Unit to further the development of awareness, commitment and capacity for working with a gender perspective in rural transport management. Support was received from a team of gender specialists, Helen Thomas, Johanna Schalkwyk and Beth Woroniuk, who were responsible for producing the handbook in consultation with Sida personnel and consultants.

The handbook is composed of three parts:

- i) An analysis of the linkages between gender equality and rural transport management which should guide sector analysis and policy development and help set concrete measurable goals.
- ii) "Talking points" to guide policy dialogue on gender in relation to rural transport management taking the starting point in both social justice and effectiveness rationales.
- iii) Guidance for mainstreaming gender in different parts of the planning cycle: sector analysis, project formulation/appraisals, annual reviews and evaluations. This part of the handbook has not been developed as a conventional checklist. It is comprised of a series of questions which should be asked at different phases of the planning cycle as well as comments on why these questions are relevant and possible actions to be taken. It aims to develop awareness of the questions that need to be asked rather than to attempt to give answers.

It is not possible to develop generic guidelines which are completely adapted to all national and institutional contexts. While this handbook was developed specifically to stimulate further deve-

lopment within Sida, it is hoped that they will also prove useful to other actors, for example to national partners and NGOs.

A handwritten signature in black ink, reading "Anders Hagwall". The signature is fluid and cursive, with the first name "Anders" and last name "Hagwall" clearly distinguishable.

Anders Hagwall  
Head of Infrastructure Division  
Department for Infrastructure and Economic Cooperation

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- 3.2** project formulation/appraisal
- 3.3** annual review
- 3.4** evaluation

## How to use this Handbook

**What Is This Handbook?** This handbook is a reference tool to assist staff to mainstream a gender equality perspective in the rural transportation sector. They build on Sida's work to date and incorporate insights from development programming around the world, academic research, and international agreements (such as the Beijing Platform for Action).

It is meant to stimulate thinking and to provoke discussion. **Not all questions are relevant at all times.**

**Why Has It Been Prepared?** The handbook has been prepared in response to requests from staff for further assistance in applying a gender equality perspective in specific sectors and at different stages of the programme cycle.

**Who Should Use It?** The handbook can be used by Sida staff at headquarters and country offices. Some of Sida's partners (government ministries, implementing agencies and contractors) may also find it useful, particularly as a means of better understanding Sida's approach to gender equality.

**When Is It Useful?** The different components of the handbook should be useful at different times. The **Overview: Gender Equality and Rural Transportation** provides an introduction to key issues in the sector from a gender equality perspective. This should help to introduce key insights and arguments.

The other four sections (**sector analysis, project formulation/appraisal, annual review and evaluation**) can be used at the corresponding stages of the programming cycle. The general overview complements each of these sections.

**How Might It Be Used?** This handbook is designed to be a working document. Ideally, staff will consult it as they move through the programming cycle.

This handbook does not provide a set recipe to be followed at all times. It is designed to raise issues and promote active learning and thinking on the relevance of a gender perspective and the goal of gender equality to different types of programming.

Staff may find it useful to review specific sections from time to time, rather than working through the entire handbook in one sitting.

Staff may also find it useful to add specific examples of best practices, case studies or terms of reference, so that the handbook becomes increasingly useful.

# Overview: Gender Equality and Rural Transportation

This overview is intended as a starting point for consideration of gender issues in relation to rural transportation. It does not aim to be comprehensive but to suggest ways in which gender-based differences and inequalities are relevant to issues and interventions in the sector. Some examples are provided to stimulate ongoing reflection and further exploration of programming options.

## 1. What is meant by a gender perspective in rural transportation?

If the rural transport sector is seen as consisting of roads, bridges, and vehicles, it is generally difficult to bring gender equality issues into focus. If, instead, the emphasis is placed on the purposes of rural transport interventions – to facilitate the mobility of persons and goods, and to facilitate access to resources and facilities – the relevance of a gender perspective is much clearer.

### *Mobility and access...*

The latter approach immediately focuses attention on the transportation requirements and problems of inhabitants of rural areas. What types of journeys do people make? Why do they make them? How do they make them? What types of goods do they move? What are the costs of journeys undertaken (in time, effort, money, opportunities foregone)? What are the costs of limitations on mobility (in losses of income, or in lack of access to health and education facilities)? What types of opportunities would a particular transport intervention provide?

### *... have gender dimensions*

For each of these questions, the responses may differ by gender. This is because the activities, resources and opportunities of individuals are significantly influenced by gender – that is, by the socio-economic and cultural aspects of being male or female. Different types of activities and tasks are generally allocated to women and men within the family, in household production, and in production for the market. Women and men are unequal in their access to socially-valued goods and resources: women generally have less access than men to, for example, education, training, land, credit, secure employment and leisure, as well as to political processes in which decisions about the distribution of such resources are made.

In short, the gender-based inequalities that exist in society also influence mobility, transportation requirements and resources, and the impact of transport interventions. Full solutions to the problems associated with gender inequality clearly do not lie within the transport sector – or within any other single sector. However, gender differences and inequalities

*A gender perspective  
is concerned with  
addressing both...*

*... difference*

*... and inequality*

must be taken into account in assessing rural transportation requirements and priorities if transport interventions are to be effective in serving the needs of women as well as men and to lend weight to the long-term inter-sectoral effort to achieve gender equality.

A gender perspective on rural transportation has two major aspects:

- > identifying differences in the socio-economic position and resources of women and men, and ensuring that transport interventions provide opportunities and benefits that meet the needs of women as well as those of men;
- > identifying opportunities to reduce gender inequalities and to move to more equal gender relationships.

## **2. What are gender aspects of transportation, mobility and access?**

### **2.1 Gender and rural transportation burdens –**

”The new approach to rural transport analysis calls for a redefinition of rural transport, to be considered in its totality and to encompass: ‘the movement of rural people and their goods to meet their domestic, economic and social needs, by any means, along paths, tracks and roads.’”

J. Dawson and I. Barwell, *Roads Are Not Enough*, Intermediate Technology Publications, 1993.

The definition of rural transport outlined above suggests that some basic questions need to be asked when planning transport interventions: what types of journeys do rural people make, and for what purposes? These might include, for example:

*Purposes of rural  
travel and transport  
are many and  
varied...*

journeys to collect water and fuelwood  
journeys to fields for crop planting, weeding, and harvesting  
journeys to market crops  
journeys to process crops (e.g. to grinding mills)  
journeys to market to purchase goods  
journeys to health centres  
journeys to school  
journeys to reach employment  
journeys to visit families and socialise...

*...and can often be characterised by gender*

The relevance of gender becomes apparent when further questions are asked about *who* makes these journeys and *how*. Given that women and men generally have different types of tasks and responsibilities (both inside and outside the home), journeys for different types of tasks and responsibilities can often be characterised as journeys by women or men. In most regions, for example, journeys to collect water and fuelwood are predominantly made by women (and children). In many regions, taking children to health centres is a task associated with women's responsibility for child care. Journeys associated with farming and marketing tasks may also have specific gender characteristics particular to a locality. Women and men may grow different crops on different fields, for example, or may have different tasks in the cycle of any one crop. Women and men may also differ in the crops they bring to market and in the distance travelled to access markets.

While many of these journeys may be relatively short and local, they need to be undertaken frequently and absorb significant amounts of time and energy – human energy. The significance of this effort and the extent to which it is borne by women, at least in Africa, is illustrated by the data presented in the box on the next page. This transport activity not only has direct costs in time and energy but opportunity costs – it absorbs time and energy that could otherwise be devoted to other activities for individual and family well-being.

*Issues include...*

Thus gender is relevant to an assessment of transportation patterns and requirements and the selection of transport interventions in several ways.

*... who does how much?*

> **In considering the overall transport burden** of rural communities and how it is distributed – the demands and constraints related to transport requirements may be unevenly distributed between women and men within communities. Assessing travel requirements and resources at the community or household level may mask the extent to which the burden is unevenly distributed between women and men within households. Assessing the distribution of the transport burden between women and men may be an important consideration in determining which types of intervention will have the greatest returns for productivity and family welfare.

*... who will benefit?*

> **In considering choices between different types of transport interventions** – the selection of particular transport interventions involves trade-offs between different transport requirements. An improved road network can provide new or better links with markets and services, particularly for those with the means to operate or use vehicles on those roads. Improved paths and bridges for pedestrians, and modest transport improvements such as

carts, may meet other more local needs. A number of reports have observed that the latter category is a neglected area of transport investment that is particularly important for women because of the type of household and productive activities for which they are generally responsible.

... who influences decisions?

- > **In considering the views of local communities** about priorities in transport improvements – differences between women and men in transport tasks and the overall transport burden mean that consultations with local communities should include specific efforts to ensure that the views of women as well as men are obtained.

### **Women's transport burden – data from Africa**

"In both Makete and Ghana women shoulder a disproportionately large share of the transport burden. In Makete women are responsible for about 75 per cent of transport undertaken in terms of time taken and about 85 per cent in terms of tonne-kilometre transport effort. A similar picture emerges in Ghana where the typical woman devotes almost three times as many hours per annum to transport, and four times as much carrying effort, as the typical man.

In both countries women, assisted by their children, take predominant responsibility for the collection of water and firewood and for trips to the grinding mill. Women contribute more labour to every transport task for which data were collected i Makete, devoting about 60 per cent of the transport time for crop production, nearly 70 per cent of the transport time for crop marketing, and 60 per cent of the transport time for harvesting. In Ghana, the intra-household share of the transport burden is slightly more equal, with men sharing approximately equally the transport tasks associated with crop establishment and internal crop marketing. Women are primarily responsible for all other transport tasks, including an approximate 90 per cent share of the transport burden associated with external crop marketing which is a major consumer of time and energy.

These data describe a major transport burden to be borne by women in the African study areas... The typical able-bodied woman in the Makete study area spends about 1,650 hours per annum, that is over 30 hours every week or over four hours per day, solely on transport. In Ghana, the typical female spends around 1,000 hours per annum or nearly 20 hours weekly on transport. These figures constitute the equivalent of 80 per cent and 50 per cent respectively of the time a typical worker would expect to devote to a typical full-time job and must be undertaken in addition to the many other domestic duties for which women take principal responsibility. The typical adult male i Makete and Ghana devotes respectively about 10 hours and seven hours each week to transport.

The full magnitude of the transport burden undertaken by women becomes yet more apparent when one takes into account the seasonal nature of the transport burden associated with agriculture. During the harvesting and marketing seasons, women's transport workloads are considerably greater than the average described above."

J. Dawson and I. Barwell, *Roads Are Not Enough*, Intermediate Technology Publications, 1993

## 2.2 Gender and means of transport –

The predominant image of rural transportation in many countries is that of a woman walking with a load on her head (often with a baby on her back, and often leading other children who are also carrying small burdens). Much rural transport – by both women and men – is on foot, whether it entails an individual getting from one place to another or the movement of goods.

### *Use of transport improvements is influenced by...*

There are also non-motorised means of transport including bicycles, donkeys, and carts pulled by persons or animals, and of course motorised vehicles including motorbikes, minibuses, trucks, etc. As with many other resources and assets, ownership and use of these improved means of transport are not equally distributed within communities and between women and men. Some of the issues to be considered in rural transport analysis and planning are outlined below.

#### *... access to vehicles*

- > **Ownership or use of vehicles for women's transport tasks and for income generation** – Ownership of all types of vehicles is less common among women than men, largely due to the cost of vehicles and the generally lower purchasing power of women. Other factors can also affect the use of vehicles owned by a household. For example, in some areas, bicycle use is not considered suitable for women. Or a bicycle or cart owned by a household may be rented out to recover the investment made in it, but this activity makes the vehicle unavailable for routine domestic tasks of women. Where such disparities are identified in transport planning, interventions could include credit components to enable women to invest in vehicles.

#### *... fares*

- > **Affordability of transport services** – The fares that are charged by public or commercial services for individuals making journeys or for goods transport may have a significant impact on who uses them and for what purposes. Here again, the generally lower purchasing power of women may mean that women are less able than men to benefit from these services unless transport policies promote fare structures that enable widespread public usage.

#### *... routes and schedules*

- > **Appropriateness of transport services** – The schedules and routes of public or commercial bus services can influence the extent to which these services meet different transport requirements. Given the responsibilities allocated to women, and socio-cultural attitudes, considerations in the development of an equitable transport policy might include: reliability of transport services (recognising women's workloads and the pressure on their time, but also

safety considerations); routes that allow different purposes to be combined, such as health centres as well as markets; the possibility of return journeys within daylight hours...

### ***2.3 Gender and the socio-economic impacts of transport interventions –***

Transport interventions affect communities in various direct and indirect ways. Moving goods to market may be easier, faster and cheaper. The flow of goods into communities may also increase, with both benefits in readier access and possible costs in displacing local production. Production patterns may change as market opportunities for new crops emerge. Land values may change to reflect accessibility to new roads and markets and this may affect the allocation of land for cash crops and food crops. Services such as health clinics and schools may be easier to reach, and other services such as agricultural extension may become easier to provide.

***Transport interventions can result in broad social changes, including...***

The ways in which the costs and benefits of such changes are distributed will be affected by the social structures and economic production patterns within a community. Some of the issues that might be considered in assessing the potential impacts on the relative position of women and men are suggested below.

***... jobs lost and gained***

> **Income and employment opportunities** – Road and transport improvements may result in various types of changes in income and employment opportunities. Locally-made products may no longer have a market as manufactured goods become available – factory-made soap is cheaper than locally made soap, and plastic containers are more durable than woven baskets and clay pots. Bicycles, carts and other vehicles may be a new source of income when operated or rented for transport purposes. Achieving an equitable result in the distribution of costs and benefits will require assessing whose avenues of employment and income are likely to be lost and ensuring that those displaced have access to new opportunities created.

***... different cropping patterns***

> **Production patterns and land allocation** – Transport improvements may affect the incentives and returns on different types of crops, and result in changes in cropping patterns, technologies and labour demand. An important issue here is women's continued access to land for their own food and cash crops (and to land that located in areas where the benefits of transport improvements can be realised).

## 2.4 Gender and employment in the transport sector –

### *Issues in the distribution of employment include...*

The transport sector provides various different types of employment. These include, for example: work in construction and maintenance of transport infrastructure (such as roads and pathways); employment in the provision of public or commercial transport services (such as driving and maintaining buses and trucks); and work in the public sector institutions that plan for the transport sector and manage transport services.

There are a number of gender-related factors that influence access to these jobs and income opportunities. For example:

#### *... equal access*

- > **Information networks that bypass women** – Information about job opportunities may be disseminated through networks that largely consist of men. For example, a village chairman may be asked to relay the message about work that will become available to build and maintain a local stretch of road. Or information about an upcoming vacancy in a public sector organisation in which the employees are predominantly men may only be available through the friends and relatives of existing employees. In both cases, women may be less likely to hear about these opportunities and therefore to put themselves forward. On the other hand, strategies that emphasise publication of job opportunities (through the media, for example) or outreach to women (through contacting a village women's committee for work at the village level, or women's professional associations for high-skill positions) can result in a larger pool of women candidates.

#### *... equal access*

- > **Perceptions of appropriate work for women** – There are many instances of employer reluctance to hire women for what are considered to be "non-traditional" activities for women. Similar views about appropriate "men's" and "women's" work may be held by professionals and civil servants and by both women and men in a community. However, women's need for income and willingness to do manual work has been made evident in construction sites in many areas of the world. Many countries have made commitments to reducing the influence of these stereotypes and to expanding opportunities for women. When assessing claims about the cultural appropriateness of certain types of work for women, it is also important to remember that such arguments may be most strongly advanced when opportunities for steady work with steady pay are scarce.

#### *... equal pay*

- > **Differential pay rates for women and men** – There is a long history in both Northern and Southern countries of paying diffe-

rent rates to women and men for the same type of job or work. In many countries, equal rights clauses in the constitution, commitments to international conventions, or specific legislation on equal pay, demonstrate a commitment changing these practices. However, change will also require a commitment by employers and supervision of pay practices.

**... active recruitment**

- > **Inequalities in access to schooling** – Lower levels of education among women than men may mean that there are fewer women candidates for supervisory and management positions. This will need to be addressed in the long-term through education policies; in the short-term, strategies for opening more of these jobs to women can be more fully explored. This could include, for example, more active recruitment to identify those women that have the relevant qualifications (while women's lower average education means that there are fewer with the requisite qualifications, not that there are none). Another approach is to review formal or paper qualifications to determine whether they are actually required for job performance (some jobs clearly need to be done by qualified engineers; for other jobs, good judgement and people management skills may be more important than a particular level of education achieved).

**...from a meeting of women with the village chairman**

"... a woman demands to know why they are not allowed to do other kinds of work: why can't they drive buses, for instance?"

The chairman says the women are not built physically for driving buses: they can't climb up to the top of the buses to lift down luggage.

A woman: 'Suddenly we hear about our weaknesses. No one mentions our weaknesses when we are planting the crops and growing the crops and hoeing the crops and harvesting the crops and cooking the food and bringing up the children and building the houses och putting roofs on the houses...'

From Doris Lessing, *African Laughter: Four Visits to Zimbabwe*, 1992

## 2.5 Gender and transport planning –

The above sections all suggest the need to consider the ability to analyse and address gender issues is an important aspect of national and local capacity for transportation planning and management. Elements of capacity in this area at the national level include:

- > data-gathering and management systems that can generate information about travel and transport requirements and resources that are disaggregated by gender (presented separately for women and

***Data, skills and linkages on gender are aspects of capacity for transport planning and management***

- men) and that include the full range of transport needs for subsistence and economic purposes;
- > planners and managers with skills in formulating and analysing questions about the socio-economic and gender aspects of transport requirements and the implications of transport interventions;
- > processes for local consultations or public participation in planning that ensure that the views of women as well as men are heard;
- > links with women's studies centres concerned with rural development and transportation, and with gender equality advocates both inside and outside government;
- > a set of guidelines or a gender-equality policy that can assist staff in taking action and monitoring progress in addressing gender-equality issues as a routine part of their work.

Decentralisation of planning and management has become an increasingly important theme in many sectors, including transportation. The aspects of capacity for the incorporation of gender issues into transport planning and management are also relevant at regional and district levels, suitably modified for the responsibilities assigned to those levels of administration.

### **3. Mainstreaming gender equality in rural transportation programming**

As noted above, there are two overlapping dimensions to a strategy of mainstreaming gender equality into programming in the rural transportation sector: the identification of means to address differences in transportation needs and priorities that arise from *differences* in the activities and responsibilities of women and men, and the identification of opportunities to address *inequalities* in access to the resources and opportunities that are provided directly and indirectly through the transport sector.

Different initiatives and areas of programming offer different opportunities for action, as is suggested by the questions raised below. Some of the questions raised may be more relevant in a particular circumstance than others, depending on the specifics of the project and on the local situation. The incorporation of gender perspectives into transportation programming is a long-term endeavour and it is clear that not all issues can be taken up at once. Rather, the challenge is to identify specific and feasible steps that can be taken within a particular project and to build on these gradually.

*Relevant actions  
depend on the type of  
initiative*

- > **In projects that seek to address local and community level transportation burdens:** Is planning based on an analysis of travel and transport patterns that allows the identification of the transport needs of both women and men? Are transport improvements such as improved paths and bridges for pedestrians, and non-motorised vehicles, being considered as candidates for investment?
- > **In projects that extend or improve roads in rural communities:** Does the project include (or is it coordinated with) supporting interventions that enable rural inhabitants to capture the benefits of road improvements, such as credit programmes to facilitate investment in vehicles? And are these programmes structured to ensure that women as well as men have access to them?
- > **In projects that will recruit and employ workers** (such as for construction and maintenance): Will the recruitment process include measures to ensure that women are informed of the opportunities available, recruited for them, and paid at rates equal to those of men? Are facilities provided for women workers (e.g., appropriate and safe toilets and rest areas)? Are there measures to ensure that women as well as men are recruited for technical, supervisory and higher-paid work (and any associated training) as well as labouring work?
- > **In projects that seek to establish or strengthen decentralised or local capacity** for planning, construction and maintenance: Can local agencies be assisted in developing their capacity to address the socio-economic and gender aspects of road planning and road works, including their capacity to gather and analyse appropriate information and to consult with women as well as men in the communities concerned?
- > **In projects that seek to strengthen skills and human resources for policy and planning at the national level:** Does the specification of needed skills and capacities include socio-economic and gender analysis (for a better understanding of transport requirements as well as the impacts of transport interventions)? Does the project include strategies for increasing the data base and training to develop skills in socio-economic and gender analysis?
- > **In projects that support training institutions and provide technical and administrative training:** Does the project include measures to promote an equitable representation of women in both technical and administrative/managerial training?

#### 4. What might a rural transport strategy with a gender perspective seek to achieve?

In summary, the incorporation of gender perspectives into rural transportation strategies requires attention to individual and community problems and requirements with respect to mobility of persons and goods and to the distribution of costs and benefits of current transport provision as well as transport interventions.

Some of the themes that might be pursued in a rural transportation strategy that incorporates a gender perspective include:

*Possible themes of a transportation strategy with a gender perspective*

- > better **gender-disaggregated data and research** to provide a more accurate assessment for planning purposes of rural transport problems, needs and priorities;
- > a **reduction in the disproportionate transport burden of women;**
- > more **equitable participation by women as users of vehicles and as transport providers** (carts, bicycles, motorbikes and other vehicles for individual use and for commercial purposes);
- > an **equitable distribution of employment opportunities** that arise in relation to building and maintaining roads and other transport infrastructure;
- > an **equitable distribution of the costs and benefits associated with transport interventions** and road improvements;
- > an **expanded role for women in decision-making about transportation policies, priorities and investments** at national level and within communities.

# The Rationale for taking a Gender Perspective in the Rural Transportation Sector: Some Talking Points

## From an efficiency/effectiveness perspective

### *A gender analysis increases the effectiveness of project and programme planning.*

Communities affected by transport interventions are not homogenous. Gender is a factor that significantly influences the activities, resources and opportunities of individuals. A gender analysis will assist in understanding the distribution of transport tasks, resources, needs and priorities in the localities concerned with the project. A project based on a full set of information has a better chance of meeting its objectives than one based on an incomplete set of facts.

### *Attention to women's specific situation and needs may be important to realising broader development benefits from transport interventions.*

If one concern of a transport strategy might be the establishment of infrastructure to support increased agricultural productivity, its effectiveness in achieving this objective will depend on whether it correctly identifies the transport constraints to increased productivity. For example, it is suggested by some studies from Africa that a major part of rural transport is undertaken locally, on foot and by women, and those women are also an important force in agricultural production. Unless interventions address the time and effort that is invested into these transport tasks – possibly through off-road improvements rather than road networks for motorised vehicles – the labour invested in local transport may itself remain a constraint to increased productivity. These are issues that can be explored in planning through a gender-aware analysis of transport activities, requirements and priorities.

## From an equitable development perspective

### *Equitable development is concerned with reducing inequalities between different socio-economic groups.*

There is considerable documentation on the disparities that exist between women and men in income, resources, well-being, decision-making power, etc. These disparities are also reflected in differences between women and men in transportation workloads, access and use of transport improvements, and access to employment and income associated with the transport sector. The application of a gender perspective allows the problems associated with these disparities to be identified and addressed.

### *Equitable development implies that development resources and benefits are equitably distributed between women and men.*

Given Sida's goal of supporting equitable development, consideration should be given to the distribution of the benefits that flow from resources allocated to development initiatives. Past experience has shown that women and men do not necessarily benefit equitably from development programmes. A consideration of the different starting points of women and men (activities, responsibilities and resources) in light of the goal of equitable development is required to develop approaches that ensure that women receive a fair share of development resources.

On the other hand, lack of attention to gender differences and inequalities can have the inadvertent effect of exacerbating existing inequalities. For example, existing gender gaps in workloads, income and resources may be increased if the direct or long-term impact of a transport intervention disproportionately favours men.

## Key Citations

**Convention on the Elimination of All Forms of Discrimination Against Women** (United Nations Convention, with over 116 States Parties)

**Article 5:** States Parties shall take all appropriate measures... to modify the social and cultural patterns of conduct of men and women with a view to achieving the elimination of prejudices and customary and other practices which are based on the inferiority or the superiority of either of the sexes or on stereotyped roles for men and women;

**Article 11:** States Parties shall take all appropriate measures to eliminate discrimination against women in the field of employment in order to ensure, on a basis of equality of men and women, the same rights...

**Platform for Action, Fourth World Conference on Women, Beijing, September 1995**

**Strategic objective H. 2:**

Integrate gender perspectives in legislation, public policies, programmes and projects.

**Actions to be taken by governments (para. 204):**

- Seek to ensure that before policy decisions are taken, an analysis of their impact on women and men, respectively, is carried out;
- Give all ministries the mandate to review policies and programmes from a gender perspective and in the light of the Platform for Action; locate the responsibility for that mandate at the highest possible level...

# An Explanation of the Handbook Structure

This column contains questions for Sida staff to ask themselves (WHAT?)

This column explains why these questions are relevant and important (SO WHAT?)

This column provides advice on what to do with the answers to the questions in the first column (NOW WHAT?)

| Sector Analysis                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Initial questions for Sida staff:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Why ask these questions?                                                                                                                                                                                                                                                                                                                                                                                                                                                              | What steps can you take? |
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| <p><b>Analyse the problems, needs and priorities of the population in relation to rural roads and transportation:</b></p> <p>Do the analyses of rural transport problems and needs (done by Sida, or national institutions or jointly), look at rural transport resources, needs and priorities by social groups and by gender?</p> <p>Consider, for example, what has:</p> <ul style="list-style-type: none"> <li>the major road and transport policies and constraints have been analyzed by gender, including differences in purposes for rural and transport, ownership and use of vehicles,</li> <li>consultation with rural communities about transport needs and priorities have allowed the identification of differences in interests between various social groups, and particularly between women and men,</li> <li>the socio-economic changes that may accompany transport infrastructure have been assessed for their potential impact on the relative position of women and men and for women's well-being</li> </ul> | <p>The identification of gender-based differences in resources, needs and priorities is a necessary first step in analyzing whether current and planned programmes and interventions in the sector fit the policies government and by Sida:</p> <ul style="list-style-type: none"> <li>take account of gender differences in resources, needs and priorities,</li> <li>address the transport problems and constraints experienced by women,</li> <li>see likely to extend benefits equitably to women and men,</li> <li>see likely to have positive outcomes for women as well as men.</li> </ul> | <p>Expand networks and information base on gender issues in transportation:</p> <ul style="list-style-type: none"> <li>undertake specific studies</li> <li>consult with women's organizations</li> </ul> <p>In all studies, consultations and analyses:</p> <ul style="list-style-type: none"> <li>include gender issues in TORs</li> <li>include local expertise on gender issues on study teams</li> <li>include gender equality advocates in all consultation processes</li> </ul> |                          |

Gender Equality and Rural Transportation Sector  
Sector Analysis

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This indicates the moment or stage in the programming cycle to ask these questions:

- sector analysis
- project formulation/appraisal
- annual review/monitoring
- evaluation

# Sector Analysis

| Initial questions for Sida staff:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Why ask these questions?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | What steps can you take?                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
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| <p><b>Analysis of problems, needs and priorities of the population in relation to rural roads and transportation:</b></p> <p>Do the analyses of rural transport problems and needs (done by Sida or national institutions or jointly) look at rural transport resources, needs and priorities by social groups and by gender?</p> <p>Consider, for example, whether:</p> <ul style="list-style-type: none"> <li>• the major travel and transport patterns and constraints have been analyzed by gender, including differences in purposes for travel and transport, ownership and use of vehicles;</li> <li>• consultations with rural communities about transport needs and priorities have allowed the identification of differences in interests between various social groups, and particularly between women and men;</li> <li>• the socio-economic changes that may accompany transport investments have been assessed for their potential impacts on the relative position of women and men and for women's well-being</li> </ul> | <p>The identification of gender-based differences in resources, needs and priorities is a necessary first step in analyzing whether current and planned programmes and investments in the sector (by the partner government and by Sida):</p> <ul style="list-style-type: none"> <li>• take account of gender differences in resources, needs and priorities;</li> <li>• address the transport problems and constraints experienced by women;</li> <li>• are likely to extend benefits equitably to women and men;</li> <li>• are likely to have positive outcomes for women as well as men.</li> </ul> | <p>Expand networks and information base on gender issues in transportation:</p> <ul style="list-style-type: none"> <li>• undertake specific studies</li> <li>• consult with women's organisations.</li> </ul> <p>In all studies, consultations and analyses:</p> <ul style="list-style-type: none"> <li>• include gender issues in TORs</li> <li>• include local experts on gender issues on study teams</li> <li>• include gender equality advocates in all consultation processes.</li> </ul> |

| <p><b>Initial questions for Sida staff:</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p><b>Why ask these questions?</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b>What steps can you take?</b></p>                                                                                                                                                                                                                                                                                                                                                                         |
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| <p><b>Analysis of existing national policies and programmes in the rural roads and transportation sector:</b></p> <p>Are national programmes and investments in rural roads and transportation likely to extend benefits and opportunities equitably to women and men? Do the criteria used for prioritizing investments take account of gender differences in resources, needs and priorities with respect to transportation?</p> <p>What national commitments have been made to women's rights and gender equality (constitutional guarantees, international conventions such as CEDAW, national policy statements on women's position or gender equality)? Are there national institutions and organisations that could support the development of gender-aware approaches in rural roads and transportation sector?</p> | <p>This step in the analysis is concerned with assessing the extent to which the needs and priorities of women are being addressed by current national policies and programmes in the sector, and to identify starting points and allies in raising these issues.</p> <p>Dialogue on gender equality issues can be assisted by reference to national commitments to improving the position of women. In many of Sida's partner countries, the national constitution and the adoption of international conventions provides a basis and a justification for pursuing women's rights and gender equality issues.</p> <p>Many countries have also established national policies on the position of women or gender equality that state general principles as well as sectoral objectives. Many have also established government ministry or office of women's affairs that acts as an advocate for gender equality and gender responsiveness in the programmes of sectoral ministries. National and local women's organisations and women's studies centres are other resources that could support the development of gender-aware policies and programmes.</p> | <p>Compare results of sector analysis with commitments in the <i>Beijing Platform for Action</i> and/or national policies on gender equality.</p> <p>Consult with:</p> <ul style="list-style-type: none"> <li>• government ministry or office for women's affairs</li> <li>• women's organisations, women's studies centres</li> </ul> <p>Encourage sectoral partners to consult with these organisations.</p> |

| <p><b><i>Initial questions for Sida staff:</i></b></p> <p><b>Analysis of the ministries and institutions associated with planning and programmes in the rural roads and transportation sector:</b></p> <p>Do the national and local institutions responsible for transport planning and programmes have the capacity to identify and address gender issues in the sector?</p> <p>Consider, for example:</p> <ul style="list-style-type: none"> <li>• Do they have access to information on travel and transport patterns and constraints by gender?</li> <li>• Do planners and managers have the skills to formulate and analyse questions on the socio-economic and gender aspects of rural roads and transport provision?</li> <li>• Have any gender equality advocates within these institutions been identified?</li> <li>• Have they developed processes for public participation in planning for rural roads and transport that seek the views of both women and men?</li> <li>• Do they have any links with women's organisations and women's studies centres concerned with gender issues in rural development and transportation?</li> </ul> | <p><b><i>Why ask these questions?</i></b></p> <p>If these national and local institutions lack the capacity to identify and address gender issues in planning or implementing policies and programmes, donor action within projects will remain isolated initiatives with limited long-term impact.</p> <p>Analyses of how organisations adopt new perspectives, including gender perspectives, have identified the importance of policy advocates. These are people within the organisation (i.e., the Ministry of Transport, district and local transport authorities) who are willing and able to promote a gender perspective, who have the knowledge and skills to demonstrate its relevance to the organisational mandate and goals, and can identify opportunities and allies to push the issue forward. The identification of individuals who are taking on this role, or potentially could do so, is a means by which to support processes already under way and to assist Sida staff in developing their analysis and strategies in the sector. Sida could assist these individuals through providing moral support, training, access to national or regional networks, etc.</p> <p>Provide support for:</p> | <p><b><i>What steps can you take?</i></b></p> <ul style="list-style-type: none"> <li>• Strategies to address gaps in data and information;</li> <li>• components on socio-economic and gender issues in training programmes for planning and management in the transport sector;</li> <li>• processes for public participation that ensure that the views of both women and men are expressed;</li> <li>• current or potential advocates of a gender perspective within partner organisations;</li> <li>• research by national institutions or women's organisations on gender issues in transportation.</li> </ul> |
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| <p><b>Initial questions for Sida staff:</b></p>                                                                                                                                                                                                                                                                                                 | <p><b>Why ask these questions?</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <p><b>What steps can you take?</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| <p><b>Analysis of employment and training in the sector:</b></p> <p>Are the employment and training strategies being pursued by national partners such as the Ministry of Transport and local transportation authorities promoting gender equality in employment in sectoral institutions? And by contractors and private sector employers?</p> | <p>Equitable employment and career development opportunities for women are an important gender issue in most sectors, including transmigration. Development cooperation programmes provide a number of opportunities to support equitable employment opportunities.</p> <p>Note that CEDAW and the Beijing Platform for Action, which have been adopted by most Sida partner countries, include commitments to equality between women and men in public and private sector employment.</p> | <p>Assist partners to:</p> <ul style="list-style-type: none"> <li>• analyze the gender balance in employment in the sector and identify barriers to equal participation by women;</li> <li>• formulate objectives concerning the representation of women in technical and management fields and set targets for recruitment, training and advancement;</li> </ul> <p>Draw on Swedish experience:</p> <ul style="list-style-type: none"> <li>• exchanges with Swedish institutions;</li> <li>• short-term technical assistance or seminars with managers</li> </ul> <p>In Sida-financed training:</p> <ul style="list-style-type: none"> <li>• include measures to ensure equitable participation by women.</li> </ul> |

| <i><b>Initial questions for Sida staff:</b></i>                                                                                                                                                                                                                                                                                                                 | <i><b>Why ask these questions?</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <i><b>What steps can you take?</b></i>                                                                                         |
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| <p><b>Analysis of opportunities:</b></p> <p>Generally with respect to rural transportation, where are the possibilities for change or for development cooperation to have a positive impact on women's position and gender equality?</p> <p>What are the constituencies that support gender equality, and what programme elements can be built around them?</p> | <p>In considering the situation overall, it is important to have a sense of where possibilities for change and impact exist, given the situation in the country, the priorities of partner organisations, and the areas of Sida expertise.</p> <p>Neither Sida nor its sectoral partners will be able to immediately and simultaneously address all the gender issues in the sector, particularly if they are only beginning to take up these issues. Rather than being overambitious and accordingly unfocused it is better to begin with a clear focus and specific objectives that can be revisited and revised in the light of changing circumstances and opportunities.</p> <p>Changes must have a domestic resonance and "demand". An important part of policy dialogue is the identification of those gender issues on which Sida can work fruitfully with its national partners, and the joint determination of feasible medium-term objectives.</p> | <p>Consult with women's organisations and other gender equality advocates about priorities, opportunities and constraints.</p> |
| <p><b>Initiatives of other donors:</b></p> <p>Are there other donor initiatives in this area that Sida could complement and build on?</p>                                                                                                                                                                                                                       | <p>Consultation with other donors is another means of gaining further information as well as for identifying possible areas of complementary or collaborative action to maximize collective impact.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <p>Share information with other donors.</p>                                                                                    |

## Project Formulation/appraisal

| Initial questions for Sida staff:                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Why ask these questions?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | What steps can you take?                                                                                                                                                                |
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| <p><b>Consultation:</b></p> <p>Is there a process for consultation with organisations and communities concerned with the objectives and activities of the project? Is the process structured to ensure that the views of women as well as men will be identified?</p> <p>Consider, for example:</p> <ul style="list-style-type: none"> <li>• Were both women and men consulted?</li> <li>• Which women/ which men?</li> <li>• How were they consulted – through meetings? interviews? survey?</li> </ul> | <p>Consultation and participation are themes emphasised by Sida in all aspects of development cooperation. In considering these processes from a gender perspective, it is important to ask <i>who has been consulted</i> and <i>whose needs</i> have been identified as important, and whether the methodology of consultations influenced women's participation and the findings. For example, if consultations are mainly with village and district authorities, or through general village meetings, it may be mostly the views of men that are heard.</p> <p>Ensuring that the views of women as well as men are heard is important as women may have different needs, concerns and priorities than men that are related to the specific social and economic context of their lives. In addition to consultations with local communities or organisations directly targeted by a project, Sida can consult with experts and activists from women's advocacy groups and women's studies centres. These can assist in identifying who to consult, how to consult, what to consult about and how to interpret the findings of the consultations. A gender analysis, as suggested below, is another input to this process.</p> | <p>Specify a specific requirement to consult with women and women's organisations in contracts and TORs.</p> <p>Assist sectoral partners to develop inclusive consultation methods.</p> |

| <b>Initial questions for Sida staff:</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>Why ask these questions?</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>What steps can you take?</b>                                                                                                                                                                                                                                                                                                                                                                         |
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| <p><b>Gender analysis:</b></p> <p>Does the initial analysis for project planning include gender perspectives? That is,</p> <ul style="list-style-type: none"> <li>• Is project planning based on an understanding of gender differences in travel and transport activities, resources and priorities?</li> <li>• Does the analysis of the potential benefits and costs of the intervention consider both direct and indirect impacts and their distribution between women and men?</li> <li>• Do institutional assessments consider institutional capacity in assessing women's transport requirements?</li> </ul> | <p>A gender analysis is an important basis for specifying objectives and strategies, which otherwise may be based on (implicit or explicit) assumptions that may not turn out to be valid.</p> <p>Although the analysis and design of programmes and projects may be prepared by national partner organisations rather than Sida, Sida can provide assistance and support to partners in undertaking such an analysis and also review the issues in its own appraisal process. Willingness to do this can be suggested at an early stage of dialogue on programme and project possibilities and can be justified by national commitments to gender equality such as the <i>Beijing Platform for Action</i>.</p> | <p>Project formulation by partners:</p> <ul style="list-style-type: none"> <li>• identify and/or finance the requisite expertise.</li> </ul> <p>Project appraisal by Sida:</p> <ul style="list-style-type: none"> <li>• appraisal team: include a member with expertise on gender issues in the transport sector</li> <li>• contract TORs: include responsibility to consider gender factors</li> </ul> |

| <p><i>Initial questions for Sida staff:</i></p>                                                                                                                                                                                                                                                                                                                                                                    | <p><i>Why ask these questions?</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p><i>What steps can you take?</i></p>                                                                                                           |
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| <p><b>Project objectives:</b></p> <p>Do the <b>project objectives</b> specify what the project seeks to achieve in relation to gender equality and women's participation? Have the gender equality concerns been considered in relation to the main issues the project was established to address? Have targets and indicators been established to clarify these objectives and to allow them to be monitored?</p> | <p>Gender-based differences in the situation of women and men mean that a "gender-neutral" or "gender-blind" project may fail to extend benefits to women or to address gender disparities in the sector. This is best avoided by ensuring that the project objectives make specific reference to gender equality.</p> <p>Care should be taken to ensure that the gender equality objective specified is related to the main concern of the project or the impact it seeks to achieve. All too often, gender integration has been pursued by adding a component that is not directly related to the main objective of the project, or by identifying an objective related to a marginal area of investment. Instead, attention should be focused on the main ways in which the project will affect individuals and communities in the project area and the main means by which the project will distribute resources and opportunities.</p> <p>Consultations with women's equality experts and advocates can assist with the identification of objectives, targets and indicators relevant to a particular project.</p> | <p>Identify gender equality objectives that contribute to overall project goals.</p> <p>Consult with women's equality experts and advocates.</p> |

| <i><b>Initial questions for Sida staff:</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <i><b>Why ask these questions?</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <i><b>What steps can you take?</b></i>                                                                                                                                                                                                                       |
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| <p><b>Implementation strategy:</b></p> <p><b>How will objectives for gender equality and women's participation be pursued in the project?</b></p> <ul style="list-style-type: none"> <li>• Have specific strategies been identified to pursue these project objectives?</li> <li>• Have the obstacles that may keep women from benefiting or participating been identified and appropriate strategies developed?</li> <li>• Have the budgetary implications of the gender equality elements of the project been anticipated?</li> <li>• Does the project management strategy and budget provide for the necessary expertise on gender issues, equality and women's rights?</li> </ul> | <p>Often, gender equality provisions are left to be "self-implementing" and the resources required to carry them out are often not dedicated. In other cases, the project design provides for some exploration of possible strategies on gender equality issues as part of project implementation rather than design, without providing a contingency fund or flexibility to finance the strategies identified. In both cases, good intentions are frustrated.</p> <p>The need for technical expertise is often underestimated. Specific skills and expertise are required for high-quality project design and implementation.</p> <p>Realism in estimating the resources required to achieve gender equality components is vital to retain respect from partner and contracted organisations.</p> | <p>Review project plans and contracts:</p> <ul style="list-style-type: none"> <li>• is there a strategy to implement gender equality objectives?</li> <li>• is the necessary expertise provided for?</li> <li>• are budgetary resources provided?</li> </ul> |

| <p><b><i>Initial questions for Sida staff:</i></b></p> <p><b>Expectations of the implementing agency:</b></p> <p>Does the implementing institution or agency have a commitment to gender equality and to achieving positive outcomes for women through the project?</p> <p>Indications of such a commitment might include:</p> <ul style="list-style-type: none"> <li>• serious engagement by senior officials in discussions on gender equality issues;</li> <li>• willingness to dedicate its own resources to action in this area (financial resources and staff time, including willingness to send senior staff on training);</li> <li>• a current set of guidelines on gender equality that are used by staff;</li> <li>• awareness of government commitments made in the <i>Beijing Platform for Action</i>;</li> <li>• ongoing links to women's equality advocates and researchers.</li> </ul> <p>Are the responsibilities and expectations concerning gender equality clearly spelled out in any agreements and contracts?</p> | <p><b><i>Why ask these questions?</i></b></p> <p>The implementing institution's understanding of and commitment to achieving project objectives on gender equality, and its ability to be flexible and innovative in pursuing these objectives, will be an important factor in the project's success in this area.</p> <p>Discussions on these issues can assist Sida to identify areas in which it can work constructively with national partners on gender equality issues in the sector. Such discussions will also assist Sida in identifying ways in which it can support national partners to develop their own capacity on gender equality issues.</p> <p>Accountability on gender equality issues is facilitated when responsibilities are clearly specified in each agreement and contract.</p> | <p><b><i>What steps can you take?</i></b></p> <p>Discuss gender equality objectives with national partners and contractors.</p> <p>State responsibilities of each party in agreements and contracts.</p> |
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| <i><b>Initial questions for Sida staff:</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <i><b>Why ask these questions?</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <i><b>What steps can you take?</b></i>                              |
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| <p><b>Reporting and monitoring:</b></p> <p>Does the reporting and monitoring system for the project provide for gender-disaggregated data collection on participation in various aspects of the project and on the indicators selected to monitor change and impact?</p> <p>Will both women and men be involved in identifying indicators to monitor change and impact, and will both be involved in providing feedback? For example, will monitoring processes seek the views of both women and men on concerns such as mobility, affordability of services, new opportunities created, and more generally social impacts?</p> | <p>The collection of gender-disaggregated data is essential for monitoring changes brought about by the project and for identifying both achievements and issues of concern. Such data might be collected, for example:</p> <ul style="list-style-type: none"> <li>• on participation in project activities (e.g, in consultations, employment in construction/ maintenance, supervisory employment, training)</li> <li>• on indicators for monitoring change and impacts (e.g, travel and transport purposes and activities, ownership of vehicles, use of transport services; assets and resources, including access to land and labour; sources and level of income).</li> </ul> <p>Gaining feedback from both women and men on project changes and impacts is important for the same reasons that consultations with both women and men are important in project planning: gender differences in activities and resources may result in differences in impacts.</p> | <p>Identify variables for gender-disaggregated data collection.</p> |

| <p><b><i>Initial questions for Sida staff:</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><b><i>Why ask these questions?</i></b></p>                                                                                                                                                                                                                                                                                                                                                              | <p><b><i>What steps can you take?</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| <p><b>Revision and renewal of projects:</b></p> <p>Have the objectives and design of a programme or project being considered for renewal been assessed from a gender perspective? That is, are questions being asked in the review and renegotiation process about:</p> <ul style="list-style-type: none"> <li>• project efforts and achievements to date in addressing women's transport needs and gender equality concerns;</li> <li>• whether the project objectives and implementation strategy require modification to reflect gender equality concerns;</li> <li>• whether the partner or implementing agency has developed an awareness or commitment to gender equality concerns in the transport sector.</li> </ul> | <p>The questions in this section are most effectively raised at the initial design stage of a project, but can also guide thinking when a programme or project is in progress or will be continued in a new phase. While options may be more restricted where the main elements of project design and objectives are already in place, small changes at this stage could still have important impacts.</p> | <p>In evaluation TORs, identify the information required to address gender issues in the project.</p> <p>Identify internal allies on gender issues (in partner institutions and on project staff) for discussions on possible project modifications.</p> <p>Consult with the government office or ministry of women's affairs or women's advocacy organisations.</p> <p>Use documents such as the <i>Beijing Platform for Action</i> in dialogue with partners.</p> |

# Annual Review

| <p><i>Initial questions for Sida staff:</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p><i>Why ask these questions?</i></p>                                                                                                                                                                                                                                                                                                       | <p><i>What steps can you take?</i></p>                                                                                                                   |
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| <p><b>Preparations for the review;</b></p> <p>Have there been important changes relevant to gender equality issues and the socio-economic position of women since the last review?</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• new legislation, government policies, or commitments on equality that affect the rural development and transport sectors (for example, as a result of the Beijing Platform for Action)?</li> <li>• the formation of new women's networks and organisations;</li> <li>• changes in economic conditions or trends that affect resources, priorities and needs for transport.</li> </ul> <p>Or have there been other developments that provide new opportunities, such as:</p> <ul style="list-style-type: none"> <li>• a decision by the national government to undertake broad policy review in the transport sector, which would provide opportunities to raise new issues such as gender-responsiveness;</li> <li>• new information or knowledge arising from research or ongoing projects that suggest promising approaches or strategies.</li> </ul> | <p>These questions assist in assessing whether the original analysis is still valid and in identifying whether programme modifications should be made. Such modifications might address problems and issues identified in the course of programme implementation or be proposed to take advantage of new opportunities that have arisen.</p> | <p>Consult with women's organisations to identify problems and opportunities.</p> <p>Include emerging issues and problems in TORs for Annual Review,</p> |

| <p><b><i>Initial questions for Sida staff:</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                            | <p><b><i>Why ask these questions?</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p><b><i>What steps can you take?</i></b></p>                                                               |
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| <p><b>Analysis of projects:</b></p> <p>In the analysis of each project:</p> <ul style="list-style-type: none"> <li>• Have short-term targets relating to gender equality been reported on and met?</li> <li>• What has supported the achievement of these targets? Can lessons be drawn for other projects?</li> <li>• If they have not been met, why not? Can measures be taken to address obstacles encountered?</li> <li>• Are the original targets still relevant?</li> </ul> | <p>This is an essential step in monitoring project implementation. It is an opportunity to assess progress to date and decide whether or not changes in basic project design are required.</p> <p>Although the best moment to integrate a gender perspective is during programme or project design, adjustments can still be made in the course of implementation.</p> <p>The Annual Review process also provides the opportunity and mechanisms to achieve agreement with national partners on any changes to project strategies that may be required. However, satisfactory discussions resulting in agreements on new or revised strategies will be more likely to occur if the groundwork has been done in the quarterly meetings leading up to the Annual Review.</p> | <p>Enquire whether targets have been met.</p> <p>Discuss measures to be taken.</p> <p>Agree on targets.</p> |

| <p><b><i>Initial questions for Sida staff:</i></b></p>                                                                                                                                                                        | <p><b><i>Why ask these questions?</i></b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <p><b><i>What steps can you take?</i></b></p>                                                                                       |
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| <p><b>Approaches taken by partners:</b></p> <p>Do the implementing organisations and contractors (including Swedish organisations) have a clear understanding of the gender-related issues and objectives in the project?</p> | <p>This is the moment to ensure that all stakeholders are on the same path with respect to project objectives concerning gender equality and women's participation, and whether Sida needs to provide additional assistance to its partners to ensure objectives in this area will be met.</p> <p>Sida could, for example, provide gender training, or facilitate the establishment of linkages between the implementing institution and other actors (such as the national office for women's affairs, women's organisations or NGOs that have experience with rural development and transport issues, other projects or institutions that have been innovative in addressing gender issues or in reaching women).</p> | <p>Assess understanding of gender-related issues.</p> <p>Advise about possible activities.</p> <p>Agree on actions to be taken.</p> |

| <i><b>Initial questions for Sida staff:</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                    | <i><b>Why ask these questions?</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <i><b>What steps can you take?</b></i>                                                           |
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| <p><b>Agenda of the Annual Review:</b></p> <p>Are gender equality concerns in the transport sector on the agenda of the Annual Review? That is, will gender equality concerns be considered as an integral part of the discussions of several agenda items, and/or be an item on its own?</p> <p>Does Sida have clear goals for raising these issues in the Annual Review?</p> <p>Is a senior member of the Sida team briefed and ready to speak to the issue?</p> | <p>If gender equality issues are not explicitly included in the agenda they may be omitted from the discussion, or get less attention than required. It is important to have one agenda item (not at the end of the meeting) in which gender equality concerns are explicitly discussed and agreements reached concerning progress toward goals. But this should not mean that there is no discussion of gender issues in the context of other agenda items. Both types of discussion are important.</p> <p>Discussions will be more effective if Sida has clear reasons for raising particular gender equality issues, and is also clear on the desired "outputs" of the discussion.</p> <p>The priority that Sida accords to gender equality issues will be reflected in the seniority of the staff member assigned to address this issue in discussions.</p> | <p>Discuss agenda and TORs.</p> <p>Clarify outputs desired.</p> <p>Brief head of delegation.</p> |
| <p><b>Agreed minutes:</b></p> <p>Do the agreed minutes reflect the discussions during the Annual Review on gender issues?</p>                                                                                                                                                                                                                                                                                                                                      | <p>The minutes of the Annual Review are an important document. The draft should be reviewed to ensure that the gender issue is dealt with in the manner intended.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <p>Review draft minutes.</p> <p>Clarify any problems in discussions with partners.</p>           |

# Evaluation

| <i>Initial questions for Sida staff:</i>                                                                                                                                                                                                                                      | <i>Why ask these questions?</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <i>What steps can you take?</i>                                                                                                                 |
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| <p><b>Terms of reference:</b></p> <p>Do the TORs for the evaluation clearly specify the gender equality issues and questions to be addressed in the evaluation? Do they clearly identify what Sida and its partner want to learn about gender issues from the evaluation?</p> | <p>A conclusion from past experience is that evaluation TORs must include explicit and feasible directions for the analysis of gender issues in order to produce a report that is helpful for future planning purposes.</p> <p>The long-standing policy of integrating a gender perspective in all Sida projects provides a rationale for including related issues in evaluations, even if specific objectives on women's participation or gender equality are not included in project documents. Given that evaluations often provide the basis for an extension or further phase of cooperation, they provide a critical opportunity to identify what can be learned from past efforts and achievements and to build on this in accordance with Sida's gender equality policy.</p> | <p>Identify evaluation issues with national partner.</p> <p>Formulate clear and specific directions on gender equality issues for the TORs.</p> |

| <i>Initial questions for Sida staff:</i>                                                                                                                                                                                                                  | <i>Why ask these questions?</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <i>What steps can you take?</i>                                                       |
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| <p><b>Project design and implementation:</b></p> <p>Will the evaluation review the process of project design and implementation? Is it clearly specified that this review should consider the extent to which Sida's gender policy has been followed?</p> | <p>This is important to specify as evaluations are frequently limited to assessing objectives stated in the project documents rather than broader issues of Sida policy such as gender equality objectives (which are not explicitly stated or interpreted in the documentation of many projects). Thus the opportunity to learn from past experience about what works and what is necessary for successfully integrating a gender strategy are missed.</p> <p>Basic questions about the process of project design and implementation include:</p> <ul style="list-style-type: none"> <li>• <b>initial analysis:</b> Was project planning based on an understanding of gender differences in travel and transport activities, resources and priorities?</li> <li>• <b>baseline data:</b> Was project planning based on gender-disaggregated data?</li> <li>• <b>consultation and decision-making:</b> Did women participate to the same extent as men in decision-making in project planning and implementation?</li> <li>• <b>gender equality objectives and strategies:</b> Did the project plan specify objectives and strategies concerning gender equality and women's participation?</li> </ul> | <p>Formulate specific questions for TORs about project design and implementation.</p> |

| <p><i>Initial questions for Sida staff:</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><i>Why ask these questions?</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <p><i>What steps can you take?</i></p>                                        |
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| <p><b>Project resources and activities:</b></p> <p>Will the evaluation review resources and activities directed to target groups?</p> <p>Is it clearly specified that this analysis should identify the extent to which women as compared with men benefited from or participated in project inputs and activities?</p> <p>Is it clearly specified that the analysis should consider the appropriateness and implementation of initiatives to address gender equality objectives?</p> | <p>These concerns are omitted surprisingly often if the requirement is not specified in directions to the evaluation team.</p> <p>The types of questions to address to evaluators varies with the types of inputs and activities of a particular project. Thus for example,</p> <ul style="list-style-type: none"> <li>• <b>in a project that provided employment</b> (in road construction and maintenance): How many women were employed compared to men, and in what capacities?</li> <li>• <b>in a project that provided training</b> (for planning and management staff of the transport ministry): How many women relative to men received training supported by the project, and in what areas?</li> <li>• <b>in a project that aimed to strengthen skills in transport policy and planning</b> at the national level: Did the project include activities to enhance skills in socio-economic and gender analysis in the transport sector, or to improve the data base and training in this area?</li> </ul> | <p>Formulate specific questions for TORs on the use of project resources.</p> |

| <p><b>Initial questions for Sida staff:</b></p> <p><b>Project outcomes with respect to mobility and transport requirements:</b></p> <p>Will the evaluation consider project outcomes with respect to mobility and transport requirements? Do directions to the evaluators clearly specify that the analysis should consider outcomes by gender?</p> <p>Or will the evaluation consider project outcomes on institutional capacity in the transportation sector? Do directions to the evaluators specify that this should include capacity with respect to gender-aware planning and programme implementation?</p> | <p><b>Why ask these questions?</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p><b>What steps can you take?</b></p>                                         |
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|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p>These questions are important for developing a better understanding (for future projects and for project planning) of the way in which particular transport interventions can be used by women and men to meet their mobility and transport requirements. The questions to be asked depend on the scope and type of a particular intervention. Types of questions that might be relevant could include, for example:</p> <ul style="list-style-type: none"> <li>• How has the intervention affected the patterns and costs (physical and financial) of transport for women relative to men? Has the intervention met the mobility requirements of women as well as men?</li> <li>• Has there been a change in the number of vehicles (carts, bicycles, motorbikes, etc)? Do women and men differ in their ownership and use of such vehicles?</li> <li>• Have there been changes in the public transport services available to the community, and are there gender differences in the use of these services?</li> <li>• Has the project enhanced capacities for generating gender-disaggregated data? for developing research agendas that are responsive to gender issues?</li> </ul> | <p>Formulate specific questions for TORs on project outcomes for mobility.</p> |

| <p><b>Initial questions for Sida staff:</b></p>                                                                                                                                              | <p><b>Why ask these questions?</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <p><b>What steps can you take?</b></p>                                  |
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| <p><b>Socio-economic impacts:</b></p> <p>Will the evaluation consider the project's socio-economic impacts, such as impacts on the distribution of resources, opportunities and incomes?</p> | <p>Rural transportation initiatives can generate major social changes. Analysis of these changes are an important source of information for future projects and for policy planning.</p> <p>Again particular questions need to be formulated in light of the particular project. For example, the types of questions that might be asked in relation to a project that has brought new roads into rural communities might include:</p> <ul style="list-style-type: none"> <li>• Has the intervention affected patterns of land ownership, access to labour, incentives and returns on particular crops, workloads, and incomes and are these effects similar for women and men?</li> <li>• What new employment and income opportunities have arisen as the result of the intervention, and are both women and men participating in them? Has there been any displacement of employment and income-earning activities among women or men as a result of the intervention?</li> <li>• Are the communities benefiting from better government services as a result of transport interventions (health, education, agricultural extension), and who are those services reaching?</li> </ul> | <p>Formulate specific questions for TORs on socio-economic impacts.</p> |

| <i><b>Initial questions for Sida staff:</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <i><b>Why ask these questions?</b></i>                                                                                                                                                                                                                                                                                                                                                                                                                                     | <i><b>What steps can you take?</b></i>                                                                                            |
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| <p><b>Evaluation process/methodology:</b></p> <p>Does the evaluation process/methodology outlined provide for the types of information and data-gathering that would allow a gender analysis?</p> <p>Does the evaluation plan provide for consultations with women and men on their views about project results and impacts?</p> <p>Is it specifically required that the data collected (from project records, surveys, consultations with communities, etc.) be disaggregated by gender?</p> <p>Do the TORs provide that the evaluation team will include a member with the requisite skills assigned to undertake the gender analysis?</p> | <p>These processes for ensuring that the views of both women and men are obtained and that gender-disaggregated data is collected must be built into the planning of the evaluation if it is to be done in a cost-effective manner.</p> <p>Past experience indicates that an adequate gender analysis requires that the evaluation team must include a member with specific and demonstrated expertise on gender analysis who is in charge of that aspect of the work.</p> | <p>Review the evaluation TORs and the evaluation plan.</p>                                                                        |
| <p><b>Lessons learned:</b></p> <p>Does the evaluation call for the identification of specific "lessons learned" about gender equality issues in any of the areas above and recommendations for future projects?</p>                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>This may seem very obvious – given that the task is an evaluation – but it is often not done even where data has been gathered. Thus, to avoid losing an opportunity to learn from experience, the evaluation TORs should specify a requirement to discuss lessons learned with respect to gender equality issues through the project and the evaluation.</p>                                                                                                           | <p>Review TORs.</p> <p>Review the evaluation report.</p> <p>Disseminate "lessons learned" to staff, partners and consultants.</p> |





SWEDISH INTERNATIONAL DEVELOPMENT COOPERATION AGENCY  
S-105 25 Stockholm, Sweden  
Tel: +46 (0)8-698 50 00. Fax: +46 (0)8-20 88 64  
Homepage: <http://www.sida.se>