

Gender and Project Management

**A contribution to the
quality management of GTZ**



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Summary

The **gender approach** focuses on the structural causes of gender-specific discrimination, and aims to achieve gender equality. This is seen firstly as a development-policy goal in its own right, and secondly as a precondition for sustainable development.

The gender approach is a **quality feature** of the work of the GTZ and dictates the following guidelines for the practical work of the company:

- The political and societal initiatives in the partner country are the starting points for TC work towards the achievement of gender equality.
- The interventions encompass all levels: micro, meso and macro.
- Gender is taken into account as a cross-sectoral task at every stage of the project cycle.
- Work starts at the level of practical and strategic gender interests.

The BMZ Gender Concept (1997) is binding for all projects.

The current direction of development cooperation - greater impact on socio-political frame conditions and a concentration on key sectors in the form of programmes - shifts the focus away from individual projects to the **country level**. The country-strategic instruments that can be used here to structure a country's portfolio include the **BMZ country concept**, the **pertinent strategy documents** and the **country briefing paper**. If these documents are to help implement the gender approach they must provide us with information on the situation and needs of both men and women.

At the level of individual members of staff, their **own attitude** to the gender issue and their **consultancy competence** play a crucial part in the realisation of the gender approach. It is recommended that **strategic**

alliances be entered into with protagonists within the project team and with other players in the country.

Networking and working groups can thus generate cross-project synergy effects.

During **project preparations** the project executing organisation is identified, as is a suitable cooperation structure, and the project strategy is developed. The foundations for impact monitoring are worked out here. When developing gender-differentiated indicators, care must be taken to ensure a balance between qualitative and quantitative information.

The orientation of the frequently seconded teams of appraisers and corresponding terms of reference play an important part. In order to ensure quality from the outset, gender know-how is essential here in terms of the specialist qualification of the team.

A **target group analysis** creates a good information base for the development of the project strategy and for the subsequent **monitoring** of the project impacts on men and women.

Within the iterative **planning process** GTZ staff members and consultants assume the role of lobbyist for disadvantaged groups by ensuring that the latter have an opportunity to influence the design of the project, and that their interests are taken into account.

Key questions can help firmly anchor the gender approach in the project strategy, which represents the core of the **offer submitted by the GTZ to the BMZ**. The gender perspective should be clearly recognisable throughout the offer. The **F categories**, which were introduced in 1990 and show the degree of involvement of women in the project and the impacts of the project on women, are to be replaced in

2000 by the **G markers** (“G” stands for gender equality). This new classification system describes to what extent a project aims to achieve equality between men and women.

Within the scope of consultancy and support for **organisational development in counterpart organisations** during **project implementation**, opportunities are offered for bringing services more into line with the needs of women and men, encouraging the appointment of women and human resour-

ces development activities geared to women, and working in general on attitudes to the gender issue.

Gender workshops allow the project team to look systematically at the issue and the way it is realised in day-to-day work, to examine their own attitudes and develop ways of improving the situation. **Parallel consultancy** for the project team has proved its worth as a way of supporting an ongoing process of learning and reflection – also focusing on the gender dimension.

Abbreviations

BMZ	Bundesministerium für Wirtschaftliche Zusammenarbeit und Entwicklung
DAC	Development Assistance Committee
FC	Financial cooperation
GTZ	Deutsche Gesellschaft für Technische Zusammenarbeit
HALFA	Senior management committee
NGO	Non-governmental organisation
OECD	Organization for Economic Cooperation and Development
PPR	Project progress review
PRA	Participatory Rural Appraisal
TC	Technical cooperation

1. Introduction

- Would you like to know what the BMZ and the GTZ expect of you, the Principal Advisers, as regards gender?
- Do you, as GTZ Office Director, feel the need to remind yourself of the instruments that can be used to operationalise the gender approach?
- Are you a consultant/appraiser, who participates in project progress reviews, and thus called on to evaluate the realisation of the gender approach?

Then read on, because these guidelines are designed to answer your questions, and to inform you about other sources of information on the topic, where issues cannot be dealt with here in more detail.

This publication is the re-worked version of the 1995 “Gender Differentiation throughout the Project Cycle”.

Since 1995 there have been many changes in the work of the GTZ; this is reflected in these guidelines. The changes can be summed up as follows:

- Because of the need to boost efficiency, the focus of TC, which is becoming more strategic and more political, is shifting increasingly to the country level and to programmes rather than projects.

- The GTZ’s understanding of project management places increasing emphasis on impact monitoring.

We have attempted to indicate more concrete starting points for the operationalisation of the GTZ gender approach than hitherto.

We would like to say a big thank you to all those who have contributed to this booklet in the form of case studies and critical feedback. In particular, we are grateful to staff members overseas for their assistance, because products from Head Office can only be of any use if they incorporate the inputs of in-country staff. We are well aware of the effort involved in making written contributions to the knowledge management of the GTZ alongside the day-to-day workload of a project.

We hope that our work will help you in yours, and look forward to receiving your feedback.

Stefanie Schaefer, September 1999

2. The Gender approach in TC: a quality feature of our work

2.1 Why is gender equality an issue in TC?

There are two fundamental reasons for working to achieve equality of women and men in development cooperation. The first is political and ethical in nature – discrimination on the grounds of sex is considered an infringement of universal human rights, like any other sort of discrimination, say on grounds of ethnic or religious affiliation, and is thus seen as something which should be overcome. The second reason is economic: the discrimination against women entails costs for society which act as a brake on social and economic development¹. The following example from Central Africa illustrates this:

On the death of her husband, Mira Ngaleu saw everything that she had built up over the years together with her husband in agriculture and small-scale trading taken away from her by the members of her husband's family. This "confiscation" was possible because women have no property entitlements should their husband die. Moreover, the older of her five children were forced to move to her husband's family. They too count as the property of the male line. Quite apart from the enormous emotional loss, Mrs Ngaleu thus lost important help in the household and at the market. Now she is left solely responsible for herself and her small children, with no financial reserves or social safety net to fall back on.

This example shows that gender-specific discrimination – in this case the lack of property rights – can produce or worsen poverty. As a result it is impossible to achieve a lasting reduction of poverty or social and economic progress without putting an end to this discrimination. This is

Gender-specific discrimination is worsening poverty

why the BMZ and the GTZ see the taking into account of gender (see Box 1 for a definition of gender) as a quality feature, and as a criterion for professional work (see BMZ Gender

Concept, 1997)

Box 1: What is "gender"?

The term "gender" refers to the male and female roles shaped by a society, learned individually and re-negotiated by each new generation. Male/female roles are determined primarily by the social, cultural and economic organisation of a society, and by the prevailing religious, moral and legal perceptions. Female and male roles and scope for action are not static, but are subject to constant change. They can vary enormously from one society to another, and even within any one society there can be significant differences depending on social class, family status, and ethnic or religious background. These roles are not neutral, but characterised by different possibilities for making choices, and different rights and decision-making powers; generally to the disadvantage of women. In contrast to the socially-shaped role, or gender, the biological sex is determined at birth and is unalterable.

It is frequently argued that in spite of the existing disadvantaging of women, any gender-specific differentiation in TC would be artificial and superfluous, since as a general rule all members of a household benefit equally from external support (such as consultancy, credit or macro-political reforms) thanks to the trickle-down effect. This hypothesis rarely stands up to closer examination in practice, however. The reasons are to be found in the very different rights of individual family members, depending on age and sex, with regard to access to family property and decision-making. Thus, in many societies the budgets of husband and wife are completely separate. They may even extend loans to one another or pay one another for work performed (cf. SEN, 1987, and KAS-MANN and KÖRNER, 1992).

In spite of this knowledge, there is a recurrent funda-

"Women's rights are human rights and are more important than anti-women practices and historically or religiously legitimated inequality." Decision of the Fourth World Conference on Women, 1995

¹ cf. GTZ/StS 04, Division 401, PALMER, I. (1994): *Social and Gender Issues in Macro-Economic Policy Advice*. Eschborn, sowie WORLD BANK (1998): *Gender, Growth and Poverty Reduction in Sub-Saharan Africa*.

mental objection that making gender an issue and influencing gender-specific imbalances within the scope of TC is an unacceptable interference in the internal affairs of partner countries, a western attack on socio-cultural values and norms. Four main arguments (at least) can be advanced to counter this:

1. Development cooperation is always an interference in other societies and cultures which is directed by values and is never neutral. The Federal Republic of Germany acknowledges the importance of development cooperation with an increasingly political dimension, which influences above all the framework conditions in a society (democratisation, good governance, etc.).
2. At the Fourth World Conference on Women in Beijing (1995) most countries in the world undertook to actively work for gender equality, and national plans of action have now been developed, and some realised.
3. All partner countries today have local initiatives and NGOs which work for women's rights at national and regional level.
4. At a time of globalisation, we are seeing world-wide social and economic change, often at break-neck speed. This also affects the relations between men and women.

Another frequently voiced critical question aimed at the issue of gender is why, after years of work and active realisation of promotion strategies, it is still necessary to say something special on this topic, to publish booklets, conduct training, etc. The best response is the following internal GTZ figures:

Box 2: Women's participation in the design and benefits of projects

	1997	1995
Percentage of projects which see women as part of the target group	94%	78%
Implementation of a gender-specific target group analysis	24%	11%
Positive impact of the project on women		
High or very high	56%	38%
Assessment of the impact of the project on men		
High or very high	60%	46%

Source: GTZ/Unit 04 (1999): Report on the fifth cross-sectoral analysis of impact observation of TC projects, either ongoing or concluded over the period 1993–1997

2.2 What does the BMZ expect of the GTZ and its staff in terms of the gender issue?

The BMZ sees the reduction of gender-specific disadvantages as a **goal in its own right** and as a **precondition for sustainable development**. Thus the BMZ demands that we, as implementing organisation, look systematically at the issue and put it into practice effectively within the scope of the projects we support.

The BMZ Gender Concept (1997) emphasises the fact that “the goal of gender equality can best be achieved if development-policy projects do not concentrate solely on improving the situation of women, but on changing the relations between men and women.” In this, the BMZ adopts a similar line to the **gender approach**, which has shaped the international debate on the topic “women and development” since the early nineties².

The gender approach places the **structural causes** of gender-specific discrimination at

² cf. MOSER, C. (1993): *Gender Planning and Development: Theory, Practice and Training*. Routledge Publications. London.

the centre of analysis and action. The focus is thus on the social processes and institutions which cause and maintain inequality between men and women – to the disadvantage of women. It was recognised that the previous approach “women in development” or “WID” was too piece-meal and tended to tackle the symptoms rather than the roots of the problem. Today the focus is on helping women to influence the political decision-making processes and on their obtaining equal access to central resources such as education, land and capital, and equal rights to use these.

The following guidelines for practical technical cooperation can be deduced:

- **From the piece-meal to the systematic:** significant impacts can only be achieved if the topic is seen not in the form of individual women’s projects or components, but when it takes the form of a cross-sectoral topic which is taken into account in the design of every project. The specific ways that men and women see a problem, and their divergent interests must be taken into account at every stage of the project cycle – identification, design, implementation and evaluation.
- **Interventions at micro, meso and macro level:** the goal of equality cannot be attained by supporting grassroots initiatives only. Reforms of societal framework conditions, for instance in legal, social and economic policy, are needed in order to overcome the structural causes of gender-specific discrimination. The same is true of poverty reduction, another development-policy goal. Government advisory projects and policy dialogues are appropriate instruments here. The meso level, which is understood as the regional and institutional level of intervention, provides the necessary link between grassroots work and policy interventions in terms of a systemic approach (see also Chapter 3).

- **Practical and strategic gender interests:** a parallel approach at different levels makes it possible to tackle both practical needs of men and women and strategic gender interests, which aim to achieve a balance of power between men and women (see Box 5 for more details).
- **Men as an important target group:** the gender approach puts the focus on the relations between women and men, and stresses the interdependence of gender roles. Our attention is not focused solely on women but also on men. At the level of grassroots projects, for instance, one crucial factor in family planning is to make men more aware, so that women feel able to make use of family planning services offered and thus decide how many children they wish to have, and how they wish to space their pregnancies. A more equal division of the workload between men and women, too, demands changes on both sides. Within the scope of consultancy work at institutional level, it is important to win over men in decision-making positions, convince them of the advantages of a gender-aware policy, and to give them appropriate support as necessary.
- **Participation:** in practical development cooperation, the gender approach is inextricably linked to participatory procedures which put the problems and interests of women and men, girls and boys - from poor groups in particular - at the centre of every project. This cannot be reconciled with the transfer of western emancipation models in a top-down approach.

2.3 The new gender equality classification system

Since 1997 the Development Assistance Committee (DAC) of the Organisation for Economic Cooperation and Development (OECD) has been working on a binding classification system for the development cooperation of member states. The BMZ has undertaken to introduce the new supraseditorial classification system³ on a

compulsory basis in 2000. This will make it possible to monitor the degree to which member states translate the development-policy goals of the OECD into practice. For German development cooperation this means, inter alia, that the **F categories**⁴ used hitherto will be replaced by the so-called **G markers**. The letter “**G**” stands for **gender equality**, which has been a strategic development objective of the OECD/DAC since 1995.

The introduction of the gender equality classification closes the gap between the conceptual approach and the practical application. While the BMZ’s 1997 gender equality concept is based on the gender approach, the F categories still reflect the “women in development (WID)” philosophy in which the focus was on women as a target group. The F categories record how women are involved in development cooperation projects and how they benefit, while the G marker describes the extent to which a project aims to achieve equality between men and women. The new classification system is thus a consistent translation into practice of the gender approach.

What does this mean in practice?

The direct and indirect, positive and negative impacts of planned or ongoing projects on gender equality must be described, and on this basis the G marker determined. There are three distinct categories:

G2

Gender equality is a “primary goal”⁵ of the project, and is expressed clearly in the project purpose and in the overall hierarchy of objectives. Gender equality is central to the project design and the project attempts to achieve direct impacts in this area. You can determine whether or not it is a “primary goal” by answering the following question, “Would the project have been implemented or planned without this development-policy goal?” If the answer to this question is negative, it is indeed a “primary goal”.

G1

Gender equality is an important “secondary goal” of the project but not crucial for implementation. Even if gender equality is not explicitly mentioned in the project purpose and overall goal (in line with ZOPP logic), the approach and the procedure should be clearly anchored in the project concept. The avoidance of any project-induced negative impacts is not in itself sufficient to justify G1 classification.

G0

The project is not geared to gender equality

A project is classified as G2 or G1 if it aims to improve the gender equality situation.

Target groups can be women only, men only or women and men. Gender-specific disadvantages can be tackled by tailoring development cooperation measures accordingly or by undertaking explicit positive measures. On this basis projects geared especially to women as a target group (which would formerly have been classed “FS”) are generally classified as G2.

Each project is classified individually, i.e. there is not automatic classification by project type. For this reason we have decided not to give examples of typical projects. If it is not possible to examine the project in

³ In line with the development-policy goals of the OECD the classification system is based on *Gender Equality, Environmental Sustainability, Participatory Development and Good Governance and Direct Assistance to poor people*. The BMZ has decided that the DAC classification system is to be introduced in all fields with the exception of direct assistance to poor people.

⁴ FP = Positive impacts for women (participation of women in the benefits and design of the project ensured)
FR = Risks for women (inadequate information about the situation of women or potentially negative impacts on the situation of women)
FU = No specific impacts on women (impossible to directly quantify gender-specific impacts)

⁵ The terms “primary goal” and “secondary goal” are taken from DAC terminology. They have no equivalent in ZOPP.

terms of gender equality because the necessary information is either unavailable or incomplete, then initially no classification is to be made.

The category “action needed” as a risk management instrument

The gender equality marker allows us to monitor the extent to which the strategic development objective of gender equality is reflected in the German development cooperation portfolio. At project-steering level the “F” categories offered the advantage of documenting both positive and negative shifts in the course of the project. The category “FR” emerged as a learning category⁶ and was used as an instrument of risk management. In order to retain this aspect, in addition to assigning the marker, the

“action needed” in terms of impacts on gender equality is to be derived in future for all projects.

- Action needed “no” means that women and men participate in the planning and in the benefits of the project (equivalent to the former “FP” category), or that no gender-specific impacts are expected (former “FU”).
- Action needed “yes” means that in the course of the project additional information must be gathered or compensatory measures planned in order to ensure the participation of both men and women (former “FR”). If necessary, a project can be re-classified in the course of the project.

Box 3 presents the key information on the new gender equality classification system and the “action needed” category at a glance.

⁶ see also GTZ, AFFEMANN, N., OSTERHAUS, J. (1995): *Von FR (Frauen-Risiko) zu FP (Frauenpositiv) oder: FR als Lernkategorie*, Eschborn

Box 3: “Gender Equality” Markers and “Action Needed” Category**Gender Equality Markers**

Marker	Definition	Criteria	Action Needed	
G2	Gender equality is a primary goal of the project	Objective of gender equality addressed in project documentation	no	yes
G1	Gender equality is an important secondary goal of the project	Gender-specific analysis performed Results of the gender analysis incorporated in planning and project concept, for example: - documentation of concrete measures - budget items earmarked for implementing gender strategy - gender-specific indicators - gender-specific consultancy strategies	no	yes
G0	Project is not geared to gender equality		no	yes

Action Needed

Action needed “no”		Action needed “yes”
a) Positive impacts assured	b) Neutral in terms of gender equality	Positive impacts are not (yet) assured
<p>Sufficient information available and hence expectation of positive impacts as regards gender equality, i.e. women and men are involved in the design and the benefits of the project on an equal basis</p> <p>and</p> <p>there is no discernible need for corrective, supplementary or compensatory activities.</p>	<p>Sufficient information is available but does not allow for identification of any target-group-specific and thus gender-specific impacts in the immediate project environment</p> <p>and</p> <p>it is not necessary or possible to design measures in terms of the gender equality objective, nor is this situation expected to change.</p>	<p>There is not as yet adequate information to allow us to assess the impacts of the project on gender equality, i.e. the equal participation of women and men in the design and the benefits of the project is not yet guaranteed</p> <p><i>(the project can be re-classified action needed “no” once the missing information is obtained and provided this gives no reason to expect negative impacts)</i></p> <p>or</p> <p>sufficient information is available and hence reason to fear negative impacts; corrective, supplementary or compensatory measures are to be included in the project and reviewed regularly.</p> <p><i>(The classification action needed “yes” retained until the final assessment of the project.)</i></p>

3. In which types of project should the gender perspective be systematically taken into account?

3.1 Gender: an issue for every sector and every level of intervention

The above guidelines make it clear that in the context of our work gender should be seen as a **cross-sectoral theme** which is relevant at various levels of intervention and across all sectors, including those often termed “technical sectors”, such as transport and construction (see Box 4). In very few instances, say projects covering solely the supply of materials and equipment, such as the “Reconstruction of railway bridges in Bosnia and Herzegovina”, can projects adopt a non-gender-differentiated procedure.

Box 4: Support for the transport sector in Swaziland

In the course of the project it emerged that this initially apparently “gender-neutral” project was nothing of the sort. The determination of bus routes, the time-tabling and the fare structure were decisive factors, determining which groups within society could use the bus system. Through persistent negotiation the women market traders affected managed to ensure that the bus route included destinations and times to suit their market activities. This was a crucial factor in the economic success of their activities. The role of the GTZ consultant seconded to the Ministry of Transport was to support a process of mediation involving the various interest groups, in particular women market traders, civil servants and bus operators, with a view to achieving a compromise that took into account as far as possible the divergent interests of all parties involved.

Source: P. Heinz, former GTZ field staff member

This shows us that gender is also a relevant topic for projects that focus on policy advice and which target the **macro level**. Here we often have particularly good chances of

- ▶ having a positive impact on **structural causes** of disadvantages suffered by women, as was the case in a policy advice project within the Namibian Ministry of Justice. Within the scope of support for legal reform, existing gender-

specific instances of discrimination, in particular in marital, divorce and inheritance law, are being identified and proposals elaborated to abolish these.

- ▶ helping **enhance the quality** of sector concepts and policies by adopting a gender-differentiated, and thus more realistic, view of society. One good example is the gender debate in macroeconomics⁷. It has now been realised that “blindness” with regard to gender-specific life situations and to the scope for action tangibly reduces the effectiveness of economic policy instruments. For instance, in several countries price incentives designed to boost production of certain export crops (e.g. tea in Tanzania) have failed to meet their mark. Planners had overlooked the fact that for any expansion of production the women would have to work more in the fields belonging to their husbands; the women, however, also farm their own plots where they grow mainly food crops, and were unwilling to give these up and jeopardise the food security of the family. The women’s existing workload was such that they were unable to invest additional time in agriculture alongside their other household and agricultural responsibilities.

In projects which aim to have direct impacts at **micro level**, the relevance of the various roles and interests of women and men is no longer questioned by most experts. Lessons have been learned as a result of setbacks in the past, say when the male farmers were advised on small ruminant health, although the women were responsible for looking after the animals. Today the interesting or critical question is rather how the topic, in terms of quality and systematic application, is handled in grassroots-level projects.

⁷ cf. ELSON, D. (ed.) (1993): *Gender-aware Analysis and Development Economics*. Journal of International Development 5 (2), sowie NN (1995): *Special Edition on Gender, Adjustment and Macroeconomics*. World Development 23 (11).

Box 5: Practical and strategic gender interests and needs

Practical gender needs are determined by the concrete living and working situation of men and women and aim to improve the satisfaction of basic needs. The realisation of practical gender needs, say access to safe water or improved seed, does not, however, by itself lead to a reduction in gender-specific discrimination. This demands structural changes which improve the position of women in relation to men. Here we speak of **strategic gender interests**. Strategic gender interests aim to achieve a more balanced division of power between men and women, i.e. equal leeway for action, opportunities for making choices and (real) rights. Strategic gender interests of women might, for instance, be to have an equal say in farmers' organisations or community councils. They might mean the right to own land or take out loans in their own name. Gender interests of men (which would lead to a more balanced relationship between men and women) are, say, the entitlement of men to take extended paternity leave, or the right to be accepted when they as men take on greater responsibility in the household and in bringing up the children.

In reality, practical and strategic gender interests often cannot be clearly separated. Thus the solving of practical problems, say, boosting the income of women by introducing them to improved cropping methods, can at the same time help strengthen their self-confidence, boost their mobility and increase their economic autonomy, and thus help change the relations between women and men.

It is helpful here to make a distinction between "practical and strategic gender interests" (see Box 5, cf. MOSER, C., 1989).

In technical cooperation projects both practical and strategic gender interests should be supported as far as possible. One example is the rural water supply project in Benin. By improving water quality and reducing the distance that has to be walked to the nearest source of safe water the project helps meet the practical needs of the people, and especially of women. In addition, care is being taken to ensure that women have an equal say on water mana-

gement committees, and that they are thus also responsible for preserving and using the facilities that are so important to them in the long term.

Evaluations to date⁸ indicate clearly that projects tend to tackle primarily the practical dimensions of gender needs (and that they have achieved laudable results at this level). Strategic gender interests on the other hand have been largely ignored. One central reason is certainly that this is the more (politically) sensitive level, where power and influence are at stake, and where the self-image and behaviour of individuals are concerned. Nevertheless, a more balanced relation between women and men can only be achieved by changes that also target the structural causes of gender-specific discrimination. It can be expedient and appropriate to tackle the practical level initially, and then, in the course of the project, move gradually closer to the strategic dimension of gender interests, as in the RRD (regional rural development) project in the Dominican Republic (see Box 6).

Address both practical gender needs and strategic gender interests

In addition to the micro and macro levels, when dealing with the question of equality of men and women we should not forget the **meso level** - the institutional link between the grassroots and the political level. In this context, the processes of decentralisation which are currently taking place in many partner countries are of particular importance. The new, decentralised structures offer strategic opportunities to anchor and implement a gender-sensitive policy. In South Africa a "gender and decentralisation" working group has been set up which brings together members of staff of various GTZ-assisted projects; in Colombia inte-

⁸ e.g. in the BMZ's series evaluation (1998): "Geschlechtsspezifische Differenzierung der Zielgruppe in ausgewählten TZ und FZ-Vorhaben" (Gender-specific target group differentiation in selected TC and FC projects).

Box 6: From practical to strategic gender interests: the experience of a regional rural development project in the Dominican Republic

Within the scope of the regional rural development project in the Dominican Republic charcoal makers/traders, the most marginalised group in Dominican society, were offered assistance to help ensure sustainable management of the severely degraded arid forest. The project aimed to achieve the ecological stabilisation of the arid forest zone and at the same time improve the living conditions of the population. This was to be achieved by:

1. strengthening self-help organisations
2. realising a management concept that conserves natural resources
3. ensuring legal access to land
4. integrating women into all project activities.

The charcoal makers/traders set up various grassroots organisations and an umbrella organisation, to allow them to better represent their own interests. Initially, women played no part in these organisations. Changing this was one of the most important, but also the most challenging, tasks of the project. At first the absence of women at village meetings, or at best their passive attendance, was made a subject of discussion by the GTZ team. Women were offered courses on food- and health-related topics – “harmless” topics – which the men were prepared to agree to. From these courses emerged the first women’s grassroots organisations. A local expert was called on to develop a gender concept, the aim of which was to integrate women into all project activities. To this end their organisational skills were to be strengthened, their participation in decision-making processes promoted and their productive and reproductive activities highlighted and supported. To realise this concept the counterpart organisation contracted three women consultants. They paid regular visits to the women’s grassroots organisation and helped them hold events. As well as organising courses on health and nutrition, they initiated discussions on topics such as “The role of women in arid forest management” and how these could be anchored in practical project work. The women’s perception of their own role within the family and community changed, as did the value they attached to it.

Alongside the work with women at various workshops, the GTZ team also advised the chairperson of the umbrella organisation on the topic of “women in development”. Courses on marketing, loans, community promotion, etc. which addressed the umbrella organisation and the grassroots organisations were always used to sensitise participants to the differing needs and roles of women and men. These two components of the gender concept, the advancement of women on the one hand and the sensitisation of men on the other, finally led to a strategic empowerment of women.

The project thus managed, for instance, to set up a committee for women’s needs within the umbrella organisation. This committee also coordinated extension services for goat husbandry, a field where women are predominant. Since these courses were held outside the villages heated arguments ensued in several families. But, strengthened by debating these controversial issues with the men, women managed to make their own room for manoeuvre, and step by step to participate more effectively in village meetings, both in terms of numbers attending and of the quality of their contributions. Today, two women are on the board of the umbrella organisation, and 30 % of members are women.

Source: KLEIN, D. (1997): *Mujeres en Marcha ... Documentation on the integration of women in all activities of the project “Rational management of the arid forest in the south-west of the Dominican Republic” – -DESUR/GTZ.*

resting experience has been gained with the project Proequidad. Civil society organisations are also important partners at meso level.

From a gender point of view it is important to identify those groups that represent the interests of women, and to involve them as partners in technical cooperation where appropriate.

3.2 Is there such a thing as “women’s projects” or “gender projects”?

There are some technical cooperation projects which have as their specific goal the achievement of equal rights for men and women, and which support partner governments’ efforts to achieve this goal. One example is the Proequidad project in Colombia, which provides conceptual back-up for the Colombian government’s equality policies, and advises it on the implementation and institutionalisation of this policy in various sectors (including health, education, employment and family policy, and in the decentralisation and privatisation process).

Another example is the gender project in Nicaragua, which helps various public institutions implement women-appropriate policy (see Box 7). One extremely innovative approach here is the cooperation with the Nicaraguan police force focusing on violence against women.

Alongside projects that support efforts to achieve equality of men and women at policy level, there are a series of grassroots level projects whose target group is exclusively female, such as the project “Vocational training for rural women” in Tunisia. In this case, the specific promotion of women was considered expedient because of the marked segregation of the sexes in the Islamic context. There are also numerous projects, say in the micro-finance sector, in which more women than men feel addressed by the project, because of the design of project inputs, and where women account for more than half of the target group. In the field of micro-finances, the reason for this is the greater interest in micro-credits shown by women. This in turn can be explained by the fact that, for women, access to the formal financial sector involves additional hurdles (e.g. collateral) and by the fact that their economic activities are generally at a very low level, with the concomitant need for small loans with short terms.

Box 7: Gender consultancy within the scope of public sector modernisation in Nicaragua

The German-Nicaraguan project to promote gender policy, launched in 1996, initiated a first “explorative approach” in consultation with the unit responsible for coordinating the modernisation programme (Unidad de Coordinación de la Reforma y Modernización del Sector Público/UCRESEP) to look at whether a gender approach might be expedient as part of the programme. An initial short study was conducted, which looked not at equality of opportunity but at the aims of the programme, and then asked whether these could be achieved without a gender-specific analysis and planning approach. The results indicated clearly that central parts of the modernisation would be jeopardised if this approach were not adopted:

- **Gearing public services to the needs of the people:**

This key element of the reform, as a quality criterion for the public sector, was to be underpinned by the introduction of a system to evaluate public services. This system did not however make the distinction in the questionnaire between male and female members of the population, apart from requiring respondents to state their sex. There was no analysis by gender that took account of question formulation, interpretation and the corresponding recommendations. With the help of the very concrete and apparently gender-neutral example of an evaluation of the use of the public transport system, which had been carried out shortly beforehand, it was possible to show how wrong the evaluations and the resulting political recommendations for action can be if they do not record the somewhat differing needs and problems of male and female members of a population.

- **Introduction and regulation of a public personnel system on the basis of criteria such as efficiency, performance and equality of opportunity:**

The study showed clearly that the Nicaraguan public service too, displayed classical gender-specific discrimination, although more than half of all employees were female: horizontal and vertical segregation and no equal pay for equal jobs. This discrimination, which could not be abolished by introducing apparently gender-neutral personnel management instruments, undermines and hinders efficiency, employee performance assessment, and, most of all, equal opportunity.

The results of this study created acceptance on the part of those involved to seek ways of recognising gender-specific differences both in the population and in the apparatus of government, and to take these better into account. After two years of in-depth cooperation within the scope of the gender project progress can be summed up as follows: the gender approach has been incorporated in the concept of the system to evaluate public services, the draft law on the introduction and regulation of the public personnel system has been modified to take into account gender-specific aspects, and the instruments of personnel management are currently being revised. In addition to this, at the request of the Nicaraguan officers responsible, the gender approach is now anchored as a cross-sectoral component in the modernisation programme. This makes Nicaragua the first country in Latin America to systematically integrate the gender approach in a programme to modernise the public sector. Gender is no longer an alien concept, but is seen by those involved as a major element in order to underpin the objectives of reforms, boost the legitimacy of government actions and finally come one step closer to achieving the goal of social justice and democratisation within the country.

Source: Annette Backhaus, Principal Adviser in Nicaragua

4. Beyond the project: gender approach at country level

4.1 General trends

As world-wide poverty grows and development cooperation funding shrinks, the debate about the efficiency and effectiveness of development cooperation has a new urgency. Today there is a general consensus that technical cooperation must become more strategic and more political in order to achieve tangible progress towards its declared goal of sustainable development. This means:

- a) that a greater influence must be brought to bear on social and political **frame conditions**; there must be a link to politics at national level.
- b) that efforts be made to **concentrate** development cooperation more on key sectors and topics. This means gearing work to **programmes** and makes possible an increase in the significance of the German contribution.
- c) supporting **civil society organisations** which represent the interests of disadvantaged groups.

These general trends also offer new opportunities to achieve equal rights for women and men. For this goal too can only be achieved by forging strategic alliances, strengthening the links between various levels of interventions, and maintaining contact to the political level. It is important to recognise that most developing countries have their own national and sector-specific policies relating to equal rights, which provide a framework of reference for us. Assistance with the realisation of these policies and strengthening of initiatives that emerged from the World Conference on Women in Beijing (1995) are important starting points.

4.2 GTZ country management

German development cooperation has various **instruments** that are used to structure **country portfolios**. If technical cooperation is to help make a genuine contribution to equal rights for women and men in a country, these “country-specific instruments” must firstly be elaborated taking into account the specific living conditions in the country in question, and the concomitant needs of men and women. The BMZ takes the political lead, while the GTZ acts as supplier of important, technical inputs for the elaboration of the

- ▶ **BMZ country concept** and the
- ▶ **key cooperation sector strategy papers**

Within the scope of technical work⁹ (including the brief socio-economic analysis) the GTZ is responsible for ensuring that the context and the frame conditions, development potentials and focuses of development cooperation in the partner country are presented from a gender-specific stance. In particular, the key cooperation sector strategy papers, which already represent a fairly concrete framework for the design of technical and financial cooperation, are extremely important.

Unlike the two above instruments, the

- ▶ **Country briefing paper** is a GTZ management instrument which is intended to help optimise in-country work. Here too the gender perspective must be integrated as a cross-sectoral topic when the paper is drafted (see Box 8). Experience has shown that one good way of doing this is to make one or two field staff members responsible for ensuring that the two cross-sectoral topics - gender and poverty - are taken into account.

⁹ See also BMZ Gender Concept (1997): Chapter 5.2.1: *Country programming*.

Box 8: Benin country briefing paper

In the Benin country briefing paper gender-specific information on every key sector of technical cooperation with Benin was processed. In the field of agriculture it became clear that the core problem of women was their strictly limited access to land. This problem can only be resolved, however, if, through the networking of interventions at village level and technical cooperation at government and policy advice level, support can be provided to revise the agricultural legislation.

The process of drafting the country briefing paper proved helpful for the development of inter-project cooperation with reference to gender.

4.3 What options do we have to harness cross-project synergy effects in order to achieve gender equality in partner countries?

In the last few years, thanks to the initiative of individual field staff members, a series of variations of cross-project networking on the topic of gender have been developed, as the following examples illustrate:

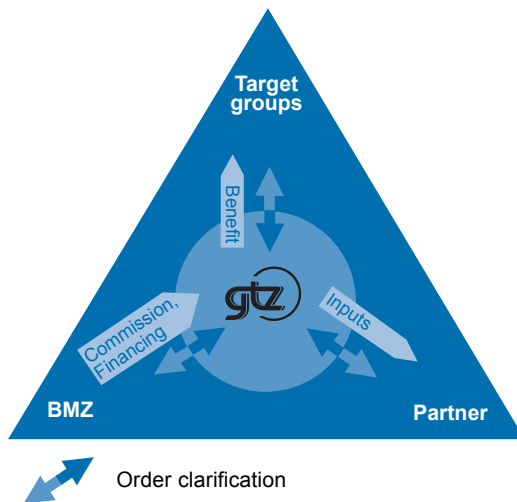
- Staff working for projects within one sector have set up a working group in order to share experience with gender-oriented activities and strategies, to discuss conceptual and methodical issues, and to create greater networking of individual activities at different levels. This model is practised in the Yemeni health sector, for instance, and in the field of decentralisation in South Africa.
- In Brazil a gender working group comprising three male and one female field staff member has been set up with one member responsible for each of the four key sectors of technical cooperation. It is the task of the members of the gender working group to incorporate the gender perspective in their own sector at major points within the project cycle, say when new projects are being prepared, and at in-country senior management committee meetings. One member of the gender team is in close contact with the department adviser, who advises on technical issues, provides relevant information and acts as coach. The counterparts of the four experts also have a particular responsibility for the gender topic, parallel to their German colleagues, say in the field of training local experts and when setting up sector-related documentation units.
- Other cross-project networks consist of regular gender coordination meetings for donor organisations working in the partner country with the participation of local (governmental and non-governmental) organisations. These meetings aim to coordinate the gender policies of participants as well as ongoing and planned projects, and to create a link to national gender policies. One product of this networking can, for instance, be the establishment of a pool of gender trainers/consultants financed jointly by several organisations or projects. We have records of experience gained with this approach in some countries, including Colombia¹⁰.

¹⁰(See GTZ/Unit 04, FORSTER, R., OSTERHAUS, J. (1997): *Handreichung Zielgruppenanalyse*). Eschborn

5. Gender: What is my role as a field staff member? Where do we start when we are implementing a project?

5.1 The role of field staff members

Consciously or unconsciously, field staff members always work within the “client triangle”, between the BMZ, as commissioning body, the counterpart organisation which accepts the consultancy services, and the target groups whose living conditions are to be improved directly or indirectly through the impacts of the project. As mediators and consultants, the field staff members stand at the interface of these divergent interests. They cannot claim to be neutral - they too are affected by their own individual values, as regards equal rights.



Source: GTZ/Unit 04 (1998):
GTZ Quality Management

The required professional attitude in the context of technical cooperation means that field staff members, irrespective of their own inclinations, adopt a **lobbyist role** for disadvantaged groups, including women – especially poor women. We, the field staff members, bear the responsibility for ensuring that the points of view of women and men are incorporated in project planning and that project impacts are monitored on a gender-differentiated basis (see Chapters 6 and 7). Within the scope of our role as **technical consultants** for counterpart

organisations it is our duty to convince them that a gender-specific approach helps ensure qualitative improvements and greater sustainability of projects and programmes.

Box 9: Controversial attitudes of Moroccan farmers regarding the freedom of movement of their wives

In a reproductive health project in south-east Morocco, women and men at target group level discussed their problems and wishes with regard to family planning. It emerged that one major problem for women (and one reason for their frequent pregnancies, felt by both men and women to be too frequent) was their extremely limited mobility. Women are not allowed to leave the house alone in order to obtain contraceptives at the health stations which are generally a few kilometres away from their homes, even if their husbands agree to practice family planning. Since the men often forget to obtain the contraceptives, women frequently run out of the pill with the resultant unwanted pregnancies. In the course of the discussions a heated debate developed in one village among the men. Some, including the mayor of the village, vehemently advocated giving women greater freedom of movement, and attacked the point of view of the more conservative men, as being narrow-minded and straight out of the Middle Ages. The opposing faction argued that it is tradition that women are not entitled to leave the house and that the tradition should be respected. In this round it became clear how different the attitudes of men can be to the issue of women's mobility, even within one village.

Within the scope of technical cooperation, where the main aim is to change behaviour patterns, it is thus important to involve the “progressive, dynamic forces” actively in project work, and to ensure that forums for discussion are created in which they can play an active part.

Source: J.Osterhaus, consultant to the project, 1997

In practice we have in fact seen that it is rare for “two opposing camps” to form on the issue of equal rights, with German consultants on one side and the counterparts

on the other. Equally, “the target group” is not a homogenous unit (see Box 9). We almost always find different points of view and opinions on all sides, which make it possible to form coalitions.

5.2 What instruments are available to anchor the gender perspective during project implementation?

Frequently, during the preparatory phase of a project, the gender-specific view is not systematically adopted (see Chapter 6). This does not, however, mean that field staff members, leaving for their country of assignment with a “gender-blind” contract in their briefcase should simply resign themselves to their fate. During the implementation phase too there are ways of making good the steps that have been forgotten at an earlier stage, and these opportunities should be used.

Where this was not performed, or not properly performed during the preparatory phase, a

► **target group analysis** should be conducted to identify the specific fields of action of women and men in the sector or topic field in question, the way they see the problems facing them, their potentials for action, and their interests and forms of organisation if relevant¹¹ (see the Peruvian example in Box 10). It is important not to make the analysis too broad or too general, since it might otherwise provide no practical pointers for project work. The participation of the partner side in the preparation and implementation of the target group analysis is vital – only by actively involving the partner can a feeling of ownership of the process and its results emerge. It can also be extremely helpful to use the target group analysis as an “exposure” situation for the project team. In particu-

lar, experts who do not work directly at grassroots level should be encouraged to gain a direct insight into the actual living conditions of their “clients” at target group level, and get authentic feedback on the services provided by their own organisation. These direct meetings often lead experts to take a critical look at their own work and give them renewed motivation.

In government advisory projects with no direct links to the grassroots level, a target group analysis can also be very useful. If gender and poverty policy measures, for instance, are to be effective they must have a qualitative information base which will enable the (gender-specific) process of impoverishment to be understood, and which will shed light on the room for manoeuvre and the survival strategies of poor population groups.

Another approach to the systematic tackling of the gender topic during project implementation can take the form of a

► **Gender workshops**¹². A workshop of this sort offers a team an opportunity to tackle the topic and its relevance systematically in the work context, and opens the door to a longer process of change and learning. From experience we know today that the following points are crucial¹³:

- The workshop must not be an isolated one-off event. It must be one component within a systematic process.
- The output of a gender workshop should always be relevant for practical work, say in the form of an agreement on concrete activities within the scope of the project strategy. What is important is that the project management supports the topic one

¹¹See GTZ, FORSTER, R., OSTERHAUS, J. (1997): *Handreichung Zielgruppenanalyse*. Eschborn, sowie GTZ, KASMAN, E., KAMPMANN, M. (1999): *Armutsminderung in der Arbeit der GTZ*. Eschborn.

¹²GTZ/Unit 04, PILOT PROGRAMME GENDER, KERSTAN, B. (1996): *Gender-sensitive Participatory Approaches in Technical Cooperation. Trainers' Manual for Local Experts*. Eschborn; siehe auch NN (1998): *Atelier sur Genre et Pauvreté*. Projet Assistance Conseil en Matière de Politique Sociale. Workshopbericht. Benin.

¹³The departmental gender/poverty reduction consultants at Head Office can provide consultancy assistance when you are devising and preparing a gender workshop.

Box 10: Target group analysis in a regional rural development project in Peru

The regional rural development project Jaén - San Ignacio – Bagua works on the eastern slopes of the Andes (500–2500 m above sea level) in the north of Peru. The rural population lives mainly from coffee and cacao farming, alongside subsistence cropping. The land use systems adopted by the population, which has been swelling as a result of migration over the last fifty years or so, are not ecologically appropriate and have already led to degradation of the soil and water reserves. This means a continual despoiling of the natural resources on which the people depend for their livelihood. It is the declared goal of the project to stop this downward spiral of impoverishment and environmental destruction. Improved living conditions are to be achieved through sustainable land use, better coordination of regional institutions, more efficient agricultural extension services and a strengthened self-organisation of farmers.

The project is still in the orientation phase. Initially an extensive target group analysis was conducted, and this has now been supplemented by additional studies and findings. The target group analysis took the gender aspect into account throughout. This method was expected to generate findings which would allow the project to adopt a strategy that would benefit both women and men equally. In addition, the qualitative results serve as the basis for subsequent monitoring. The evaluation of the findings of the target group analysis was performed in line with the following categories: production systems, social organisation, ecosystem and farm/household economy.

What benefits does the project reap from this analysis and how are the findings integrated into project work? The following examples give us an idea.

The study of **production systems** indicated the division of labour between men and women, girls and boys. The counterpart was not previously aware which activities were performed to what extent by women and by men. The new data makes it possible to tailor agricultural extension services to women, in line with their specific activities.

The gender-differentiated analysis of **social organisations** on the ground revealed the degree to which women participate in grassroots organisations. The level, however, is extremely low, as soon as decisions must be made. Women are only asked to participate when, say, construction work is to be performed by all participants. One key focus of promotion will thus be to encourage greater quantitative and qualitative participation of women in the decision-making and activities of grassroots organisations.

Ecosystem: The reduction in tree cover means that women must travel increasing distances to gather fuelwood. Afforestation in the project region thus offers positive impacts not only from an ecological stance. The improved clay stoves introduced by the project also use less wood and produce less smoke, thus reducing the health risks for women and the family as a whole. Another possible area of promotion would be to improve the drinking water and sewage systems of the communities. This is one main concern of women, since they are the ones within the family who are particularly affected.

Farm/household economics: It was assumed until now that the market gardening and small animal husbandry activities of women served mainly to produce food for the family. The analysis however revealed that the sale of vegetables and small animals, in particular in communities that are fairly close to towns, generates a relatively high income and makes a not insignificant contribution to the family budget. Women are now to receive extension services on market gardening, small animal husbandry and marketing. In this context the project is helping one community to organise a market and build a market hall.

Sources: BRENDEL, C. (1998): *Zielgruppenanalyse mit Gender-Perspektive: Ein wichtiges und nutzbares Instrument in der armutsorientierten Projektarbeit. (Target group analysis with gender perspective: an important and useful instrument in poverty-oriented project work)* Eschborn; and verbal information from project staff members

hundred percent (and naturally also attends the workshop) and respects agreed steps in future.

- The workshop should aim both to sensitise participants to the topic and to extend their methodical and analytical competencies.

- A crucial factor when putting into practice what has been learned is the link established at the workshop to the real working conditions of the team, perhaps using genuine project documents.
- The workshop should have an interactive character and make use of the experience of participants and resource persons.
- It makes sense to establish a link to national equal opportunities policy and to seek contacts to existing action groups in the country in question.

Positive results have been achieved with respect to the gender topic in project implementation with the help of

- ▶ **parallel consultancy**¹⁴. Various paths have been explored here. In some countries projects within one sector have got together and hired a local expert to provide parallel consultancy on gender-specific procedures (e.g. in the Jordanian agricultural sector).

In Ethiopia a seconded field staff member has been released from other duties so as to enable her to spend some 30 % of her time providing gender backstopping services to other projects as well as training local experts. In other countries technical support has been imported in the form of process-oriented short-term consultancy services provided by an international consultant.

Another variation of in-country support was selected by the GTZ Offices in Nepal and the Philippines. A local expert was employed by each Office to provide cross-project support on gender-related issues.

When anchoring the gender approach in project implementation it is paramount, irrespective of the practical starting point selected, that the activities are geared in the medium term to achieving an appropriate

- ▶ **institutional anchoring within the counterpart organisations**¹⁵. It is not enough merely to conduct innovative measures in an exemplary fashion, it is important that in the long term the counterpart organisations

- a) gear their range of services to the different situations and interests of women and men in terms of subject matter and methods used.
- b) ensure that staff develop relevant competencies and an appropriate understanding of their own professional work.
- c) anchor the topic in their organisational structure and operations such that it does not become isolated, but enters the mainstream.

The institutional anchoring can be achieved using various steps in organisational consultancy processes.

The first step is often a organisational diagnosis. This can be performed both during project preparations in the form of an **executing organisation analysis** (see Chapter 6) for decisions on cooperation, or as a starting point for organisational development processes.

Should they encounter resistance on the partner side, the officers responsible for the commission can, for instance, utilise **consultancy missions** in order to underline the point of view of the German side with regard to the gender issue or, in particular when aspects are concerned that go beyond the scope of the project, pass the feedback on to the BMZ so that the topic can be tackled within the scope of the **political dialogue**.

¹⁴GTZ/STS 04, Division. 402, FORSTER, R. (ed.) (1997): *Das Lernen von Projektteams fördern*. Eschborn.

¹⁵See also FRISCHMUTH, C. (1997): *Gender is not a Sensitive Issue: Institutionalising a Gender-Oriented Participatory Approach in Siavonga, Zambia*. IIED, Gatekeeper Series No. 72.

Box 11: Representation and role of women in grassroots organisations, rural drinking water supply in Maradi District, Niger

Brief description

The project aims to sustainably improve drinking water supplies for the rural population by building and rehabilitating dug wells (financial cooperation) and conducting sensitisation measures in order to enable well users to organise and assume responsibility for the operation and maintenance of the wells by setting up well management committees (technical cooperation).

The well management committees have at least four members (president, treasurer, hygiene officer, well keeper) who are trained for their specific duties and later train the other villagers, initially with the help of facilitators from the programme.

The idea to push the active participation of women, who play a key role in the drinking water supply and hygiene education, by imposing a quota (about half of committee members must be women) was realised with the help of extremely intensive training for the women and involving them in the organisational and decision-making structures.

Target group workshop

To prepare a project progress review and subsequent planning workshop for a new phase of the project (1999 – 2003), a target group workshop was conducted, which was intended to help incorporate the experience of the target group with the existing well management committees in the planning of the next phase. Taking the treasurer as an example, the position of women within the committee's management structures will be outlined.

To allow us to better understand the role of the treasurer it should be pointed out that the project only responds to requests from villages which agree to pay an annual financial contribution to cover the costs of future maintenance and repair work. The treasurer must monitor payments made by well users to the well cash fund, and must keep a cash-book

At the target group workshop the women explained that they often had difficulties collecting the contributions from male villagers, and that where male contributors paid their fees jointly, the contributions were not paid regularly and in full to the treasurer. Another problem was that the cash-book was often kept by the president of the committee, which, according to the treasurer, resulted in attempted fraud on the part of men.

Together with all participants, proposals were worked out in order to improve the situation and strengthen the role of the treasurer.

- The women proposed that the money should be collected only at fixed times at a predetermined place (preferably in the yard of the village chief), and only by the treasurer.
- The men proposed that the contributions of male contributors be collected by a man and then passed on to the treasurer.

At the end of the workshop all participants agreed to the women's proposal and it was also agreed that the cash-book must be kept by the treasurer. If payments were not made regularly the village chief should intervene and take appropriate steps.

Observations at the planning workshop

The results of this target group workshop were presented in detail at the planning workshop which followed the project progress review, and led to a discussion of the programme approach and, in particular, the integration of women into the committees. The external consultant felt that it was unreasonable to expect women to collect money from men in a traditional environment. He criticised the attempt of the programme to integrate women into administrative structures without taking into account the social milieu and claimed that this hurt women more than it helped them, making it a typical example of a poorly understood attempt to force equal rights.

According to the teams of facilitators however, it is the wish of both male and female contributors that the post of treasurer is filled by a woman. In general women enjoy greater trust, because "if a woman were to steal money she would be sent away from the village, whereas if a man steals money it is considered normal and he is allowed to stay." The logical conclusion is that women (generally) do not steal money, and the contributions are in good hands.

Conclusion

These observations illustrate that consultancy is based on questions and that answers must be elaborated together with the target group. Only together can we prevent consultants falling prey to their own patterns of thinking, which might even be "gender-specific", in spite of their good intentions and efforts to understand the socio-cultural environment.

For the realisation of the programme approach it is highly significant that men wish to see women treasurers. For all participants must benefit from changes in the village if these changes are to be accepted in the long term, and who knows, maybe one day a woman president will be appointed to a well management committee.

Source: M. Meuss, field staff member in Niger

6. Gender differentiation in project preparation and planning: setting the course

6.1 Proposal for a project appraisal

Once the GTZ has given a brief assessment of the project proposal submitted by the partner government, and if the BMZ decides in favour of the project, the GTZ is asked by the BMZ to submit a working proposal for carrying out a project appraisal or a mission to further clarify the proposal¹⁶. The working proposal generally comprises the rough outlines for cooperation, and identifies the questions that must still be clarified as regards the context, the structure of the counterpart organisation or organisations, and the project strategy. Any information gaps with respect to the different roles and interests of women and men in the sector or topic field affected should also be pointed out at this stage. This is important in so far as the working proposal is the basis for the terms of reference for the appraisal mission.

6.2 What must be observed in the terms of reference for appraisers and in the appraiser team itself?

The scope and intensity of the work of the appraisal team in the country in question will depend on the quality and degree of finalisation of the project proposal. In most cases assistance is given to conduct a target group analysis within the scope of project preparations, and questions are clarified with regard to the executing organisation structure. To ensure that the gender perspective is adequately taken into account in the process of in-country analysis and planning, the terms of reference for the appraisal mission must explicitly stipulate that the target group analysis is required to be gender-specific. Furthermore, within the scope of the clarification of questions at institutional level, the status of

Explicitly anchor gender as a cross-sectoral topic in terms of reference for appraisers.

gender equality within the counterpart organisation must be determined, as well as the ability of staff members to cope with this topic, and the extent to which the services are geared to the different needs of women and men.

Should the project involve government advisory services with no direct link to the grassroots level, it should be ensured that gender competence is provided for the planning process in the form of a (local) resource person who is able to present the relevance of the topic for successful sectoral policy and to identify pertinent starting points or issues for the implementation phase.

Box 12: Consequences of an inadequate analysis of gender-specific realities during project preparations

In a natural resources management project in Niger, windbreaks were set up in order to prevent erosion. When the project was designed it was not taken into account that small ruminants are an important source of income for women in the region. The windbreaks divided up their grazing grounds and thus entailed a de facto loss of income for the women. The fields are protected, but the impacts of the project on women were mostly negative, especially since they were not even able to use dead wood from the windbreaks as fuelwood. The level of motivation of women to participate in the setting up and care of windbreaks is thus naturally low. A target group analysis could have identified this problem in the preparatory phase.

Source: BMZ, GÄHSING, K., BLISS, F. (1992): *Möglichkeiten der Einbeziehung von Frauen in Maßnahmen zur ressourcenschonenden Nutzung von Baumbeständen*. Forschungsbericht No. 100, Bonn.

When formulating the terms of reference for the appraiser mission efforts should be made to avoid assigning responsibility for gender to only one team member as an isolated package. This does not generally lead to systematic results and might well end up as the infamous “women’s compo-

¹⁶ There are four possible options:

1. Project appraisal,
2. Consultancy services to help design a project,
3. Clarification of the concept and the executing organisation structure,
4. Consultancy services to design an open orientation phase.

ment". Rather the different views of men and women should be incorporated as a cross-sectoral topic in all the individual terms of reference, and should in particular be reflected in the terms of reference of the team leadership.

Where this has not previously been done, it is important to explain the development-policy criteria of the BMZ as an important guideline for future cooperation, at the latest during the project appraisal stage or during the in-country support, in order to help the counterpart organisation design the project. This includes a presentation of the reasons why a German-assisted project must embrace gender-specific aspects.

6.3 Gender-sensitive objectives-oriented project planning

ZOPP (objectives-oriented project planning) is a structured process of analysis and planning during which the GTZ, project partners and target groups clarify in the country in question what the project is to achieve, how it should proceed and who is to provide which inputs and assume which responsibilities. The selection of the methods and the design of the process is not rigidly laid down, but can be selected flexibly in line with the given situation.

Objectives-oriented project planning takes place within the scope of the preparations for every new project, and continues in the form of an ongoing process throughout project implementation.

a) Clarifying the context and determining the system of objectives

The first step is to perform a differentiated analysis of the context. This is then the foundation on which the project concept builds. As when constructing a house, if gross errors are made at this stage the entire building may collapse at a later date.

The quality standards that the GTZ has set itself mean that during the analysis of the context, professional account must be taken of the fact that the people affected, or the **potential target groups are not a homogeneous group**, but consist of men and women of various ages, social classes, ethnic backgrounds, etc.

Because of the different gender roles, the way women and men see a problem can vary widely, as can their interests and their leeway to act. For example:

- Women and men are responsible for different tasks, and have different workloads.
- In contrast to men, women tend to be responsible for both the so-called reproductive tasks (household and children) and for working in the productive sector (especially in agriculture and the informal sector).
- The gender-specific division of labour and societal norms accord women and men different degrees of mobility and time-capacity profiles.
- Men and women have different access to and control over key resources (land, capital, education, information, etc.).
- Women have fewer opportunities to voice their interests publicly and to exert their influence on (political) decision-making processes.

If it does not prove possible to identify the specific points of view of women and men when the context is clarified, it will be impossible to devise a gender-sound project concept. The aim must thus be to investigate the following questions to clarify the way women and men see the status quo:

- What situation is to be changed, which problems tackled?

Gender-differentiated procedures – a quality feature of ZOPP

- Who is directly affected by the problems?
- How do those affected and the major participants see the problems?
- Does the project idea (which generally comes from a government institution) focus on a problem situation considered relevant by those affected?
- What ideas/visions are there with regard to the proposed changes?
- What efforts have been made to date in order to achieve the goals? What came out of these endeavours?
- What additional potentials can be mobilised?
- What external support is needed to allow those affected to harness the additional potentials?

And how can different points of view be incorporated into the planning process?

It is not automatic for women, like poor population groups, to take an active part in the preparation and planning of projects. There has to be the will to involve them, and the process must be organised. The further development of ZOPP (objectives-oriented project planning) and its methodical flexibility have opened up new opportunities to respond to the old call for “active participation on the part of those affected”. It has proved valuable in many cases to organise the analysis and planning process, for instance, not in the form of the traditional four-day ZOPP workshop, but

Gender-differentiated procedures are linked to a participatory understanding of the project.

rather at various levels and with different methods which are appropriate for the participants in each case (including participatory rural appraisals, PRA). This gives, in particular, poor population groups and women with limited mobility

better chances of participating. The other advantage of a procedure of this sort is that

the people affected analyse their own development constraints and opportunities, and develop solutions which build on previous local initiatives. This is the only way to achieve the much vaunted ownership on the part of the players affected.

Build on local initiatives

In many partner countries it has proved culturally appropriate to conduct individual analysis and planning steps with women and men separately (and if appropriate the groups can be further sub-divided into different age groups), since women are often reluctant to speak out in public because of prevailing social norms.

It is most important that care be taken not to lump women together as an isolated category alongside a hypothetical main target group (e.g. small farmers, or small businessmen and women). Rather, the specific ways women and men see a problem and their specific interests should be identified. The point is to recognise the different contexts of female and male small farmers for instance, or small businessmen and small businesswomen. If there are disproportionately few women entrepreneurs, the reasons for this should be identified (e.g. gender-specific access to capital, ownership laws and workloads) and ways of overcoming or reducing these obstacles identified.

b) Analysing the structure of the counterpart organisation

Project preparation generally involves clarifying open questions regarding the counterpart organisation or organisations. Frequently, when the project idea is still in the early stages of development, a suitable **executing organisation structure** still has to be identified. With respect to gender, the following questions are important:

¹⁷For an overview see SCHÖNHUT, M., KIEVELITZ, U. (1994): *Participatory Learning Approaches: Rapid Rural Appraisal, Participatory Rural Appraisal: An Introductory Guide*. Schriftenreihe der GTZ No. 248. Eschborn.

Box 13: Male and female preferences for various tree types, regional rural development project, Senegal*
a) Men's Matrix

Tree ►	Baobab	Mango	Neem	Lemon	Acacia Albida	Prosopis
Assessment criteria ▼						
Monetary income	5	10	2	8	4	3
Soil protection/fertilisation	-	-	-	-	10	8
Forage value	8	7	-	-	10	4
Human food	6	10	-	4	-	-
Medicinal purposes	5	7	-	4	-	8
Construction timber	2	3	6	-	10	8
Total	26	37	8	16	34	31

b) Women's Matrix

Tree ►	Baobab	Mango	Cashew	Lemon	Parinari	Jujub
Assessment criteria ▼						
Monetary income	6	10	10	9	8	8
Human food	10	6	5	10	9	7
Fuelwood	7	8	8	10	9	8
Total	23	24	23	29	26	23

* The matrices were drawn up within the scope of a participatory analysis process at village level in single-sex groups. The higher the number of points, the more positive the assessment. The results show that women and men consider different criteria relevant for the assessment of the trees and that, in some cases, different trees were mentioned, which can be explained by the gender-specific division of labour. This is also the reason for the different preferences regarding the selection of trees.

Source: documents from the PAGERNA project, Senegal

- What is the attitude of the (potential) counterpart organisation to the gender approach? Does it have an explicit gender policy?
- How is gender anchored within the organisation in terms of staff and structure?
- To what extent are the current services geared to women as a target group in terms of subject matter and methods?
- Are the different impacts of services on women and men observed, and is an attempt made to reduce gender-specific imbalances?

- What degree of acceptance does the organisation enjoy vis à vis the female and male members of the target group?
- To what extent is the staff sensitised, trained and motivated to work in a gender-specific way? What staff training and development needs exist in this field?
- Are there local NGOs with special gender competence which might be interested in working as partners?
- What percentage of the total staff is female? Will additional female staff be needed in order to reach and support women at target group level in a suitable way?

c) Developing the project concept

If the analysis of the status quo revealed that women and men have different views of the problem, and different interests and different potentials with respect to the project topic, there will be subject-specific and methodical consequences for the design of the project concept, and the differences must be visibly anchored in project planning.

Here too, care must be taken to avoid that “women’s concerns” are included as a separate topic, summed up, for example, under one individual result. When the wearing of “gender glasses” is the norm, there is a better chance of moulding the project purpose, and the results and activities – in effect, forming the product, which might otherwise look quite different. It is important, if possible, to take into account both practical and strategic gender interests (see Box 5).

The following **key questions** can help you to determine to what extent you have managed to anchor the **gender approach in the project strategy**:

- Do women and men benefit equally from project activities? Does the project make an explicit contribution to improving the economic and social situation of women?
- Are women and men more than merely passive recipients of external inputs? Are they actively involved in the design of the project?
- Are the indicators at project purpose level worded in a gender-specific way, in order to indicate clearly any different impacts on women and men?
- Are results and activities differentiated on a gender-specific basis where relevant?
- Are activities planned in order to counteract any existing obstacles to the participation of women?
- Have activities been planned to ensure the greater institutional anchoring of the gender approach in counterpart organisations?
- Should the socio-cultural environment make it impossible for male project staff to reach the female members of the target group, have plans been made to employ female staff?
- Have further-training measures been planned for the project team and their counterparts to raise their level of professional skills in matters of gender-differentiated procedure?

6.4 Drawing up an offer

The logical consequence of a gender-differentiated procedure within the scope of project identification and design is an offer, where the gender perspective is clear throughout. In other words, if no attention is paid to the different interests of men and women during the preparatory phase, the project concept presented in the offer cannot display the desired quality. Cosmetic linguistic efforts might as well be forgotten. It would be better to provide for a subsequent gender-specific target group analysis in the planned activities, which can then be taken as the foundation for any corrections

in the implementation phase.

The section “Quality Assurance for Offers” also looks at the relevance of the gender perspective in the assistance it provides, and it has drawn up recommendations (available via Prisma). Let us look briefly at the most important parts of the offer, in which the cross-sectoral topic “gender” must be visible:

- **Description of the context (problem analysis).** It should be clear here in which form both women and men are affected by the problem situation.
 - **Description of the project purpose and the overall goal.** This includes an assessment of the project in line with the BMZ’s gender equality regulations (see BMZ Gender Concept 1997). The indicators of the project purpose, which describe the impacts of the project at target group level, should be differentiated by gender as far as is practicable, so as to make it possible to look at different impacts on women and men.
 - The **description of the target groups** must be gender-differentiated in line with the problem analysis.
 - In the **description of the project design** both the methodical approach and the activities planning should explicitly anchor gender-specific procedures; this should be clearly expressed in terms of content matter and the wording. The participatory character of the procedure too should be recognisable.
- In the **description of the executing organisations or implementing institutions**, their relations to the target group should be explained. This includes looking at the acceptance and status of the gender approach within the counterpart organisation.
 - In the **socio-cultural assessment** you must present a plausible assessment of the probable impacts of the project on women, and the form in which the various target groups will participate in the project. The project is assigned a corresponding “G” classification (see Chapter 2.3). An explanation of the degree to which gender equality is part of the project-objectives system serves as a basis for deriving the “G” classification.
 - In the **description of inputs** (Part B) in particular when determining the staffing resources and the staff profiles, and in the specification of inputs (GTZ and partner sides), care should be taken to accord the gender aspect the importance it deserves given its significance for the project. This can take the form of local or seconded short- or long-term experts.

7. Gender and Monitoring: what counts is the result

Today, for the GTZ, monitoring is understood as a process of structured learning¹⁸. The critical mirror that the project team regularly peers into is intended to help them to recognise deficits and shortcomings, but also strengths and successes in the project concept and implementation as clearly as straightforwardly as possible. This is the only way to tailor project inputs better and to allow for their adjustment to changing situations.

The information gathered affects different levels:

- Contributions (inputs, activities, results),
- Impacts¹⁹,
- Development of assumptions and risks of a project.

Very frequently the indicators, especially at impact level, are not worded in a gender-specific way, but are laid down at budgetary level. This precludes any differentiated observation of the way the project benefits women and men. For instance, an indicator “household income raised by x % over the period y”, says little about who benefits from this increase in income within the household and how the workloads of the various members of the household change, for example as a result of more intensive cropping methods, or price incentives for export crops.

A gender-specific differentiation of the indicators at the various levels of the monitoring system, on the other hand, allows us to answer the following questions²⁰:

- What impacts can the project be proved to have had on women and on men respectively? Which impacts touch on practical and which on strategic gender interests?

- To what extent are project inputs (in terms of subject matter and methods) geared to women or men, and how are they used by the two groups?
- Does the development of assumptions and risks have different implications for men and women?

In the GTZ's understanding of management, the focus of monitoring is today more on observing project **impacts**, rather than inputs and activities. There has also been a shift away from control towards **communication** and consensus building. It is often less a question of collecting extensive statistical data than of the project team getting feed-back from its “clients” regarding the measures conducted. This can, for instance, take the form of structured discussion rounds with male and female representatives of target groups²¹.

In government advisory projects, in contrast to grassroots-level projects, it is often very difficult to identify the chain of impacts right down to target group level. Here, attempts should be made, at least under the aspect of plausibility (which will of course always have a hypothetical nature), to assess the impacts while taking the variable “gender” into account in a systematic way. Another possibility is to investigate the impacts of policy reform at micro level (broken down by various groups of players, women/men, social class) with the help of qualitative data gathering²².

Gear your work at impact and communication

Use participatory methods

¹⁸See GTZ/Unit 04 (1998): *Monitoring im Projekt. Leitfaden GTZ*. Eschborn.

¹⁹Quantifiable project impacts comprise the use of project inputs by the target groups, the resulting direct benefit accruing to the target groups and any unintended positive and negative impacts of the project.

²⁰The BMZ expects the GTZ to answer these questions within the scope of the annual project reports, cf. BMZ Gleichberechtigungskonzept, 7/97, p. 15.

²¹In this context the use of participatory methods from the “PRA toolbox” have proved valuable. See in particular: NETHERLANDS DEVELOPMENT ORGANISATION (SNV) (1995): *Monitoring and Evaluation from a Gender Perspective: A guideline*. (Available in the GTZ library).

²²One example is: GTZ, MUELLER-GLODDE, U. et al. (1998): *Qualitative Impact Monitoring of Poverty Alleviation Policies and Programmes in Malawi: An Approach based on Rapid Rural Appraisal (RRA) in 12 Malawian Villages*.

There should be a balance between qualitative and quantitative information

In general, when **indicators** are worded care should be taken to ensure that qualitative information is accorded an appropriate status alongside quantitative data. In very many projects, for instance, the development-policy key question is how the organisational and problem-solving capacities of the players involved develop²³ - and this cannot be quantified in “tonnes of rice” or “incidence of disease among cattle”. At the end of this chapter gender-differentiated indicators for one small industry promotion project are listed by way of example (Box 15).

Box 14: Examples of fields of observation of gender-specific project impacts

Practical needs

- Nutrition situation
- Health situation
- Workload

Strategic interests

- Access to and control over major resources, such as land, capital, technology, knowledge
- Participation in decision-making processes
- Degree of organisation
- Self-confidence, self-image
- Mobility
- Division of labour between women and men

As regards gender, too, figures alone tell us little. For instance it is not only interesting to follow how many women are members of water committees, community councils or farmers’ organisations. It is also important to establish what positions they hold there, and whether or not they take an active part

in decision-making. Let us recall here the difference between “practical” and “strategic” gender interests. These two dimensions correspond closely to the quantitative and qualitative levels of project impacts (see Box 14) – and project monitoring should provide information on both levels.

In contrast to ongoing internal project monitoring, the project progress review (PPR) is a critical, externally-supported reflection on the status and impact of a project. The PPR, as in internal monitoring on which it is based, should respect gender-specific differentiation in terms of inputs and activities, but above all with regard to (planned and unplanned) impacts (see also Box 15).

Within the scope of the project progress review the project team, with the assistance of the external consultants, should reflect on the following key questions regarding gender orientation:

- Is project planning based on a situation analysis in which women and men from different social and age groups were able to contribute their own perspectives and interests?
- Were gender-specific interests (practical and strategic) adequately taken into account when the project strategy was elaborated?
- Does the project implementation at target group level, institutional level, and with regard to the framework conditions, consciously look at the interests of women and men?
- Is this reflected in terms of the contents and the methodical procedures of the project?
- Are gender-specific project impacts (intended and unintended) observed, corrected if necessary, and compensatory steps taken?

²³cf. HAGMANN, J. (1995): *Development and Institutionalising of Participatory Innovation Development and Extension in the Agricultural Extension Service in Zimbabwe*. Informationsblatt der GTZ Abt. 425, 4/95. Eschborn.

Box 15: Gender-differentiated indicators in a small industry promotion project**1. At impact level****a) quantitative information**

- Trend in profits of enterprises managed by women and men
- Number of additional staff employed (broken down into male/female categories) in enterprises managed by women and men

b) qualitative information

- Use of additional income (broken down into male/female categories)
- Changes as regards the qualification of male and female entrepreneurs
- Changes in legal framework with regard to existing gender-specific disadvantages for female entrepreneurs
- Quality of the way employers' federations represent the interests of female entrepreneurs

2. At the level of inputs and activities**a) quantitative Information**

- Number of loans taken out, and amounts (broken down into male/female categories)
- Repayment rate/ savings rate (broken down into male/female categories)
- Number of male and female entrepreneurs attending further training

b) qualitative information

- Assessment of the quality and relevance of further training courses by female/male participants
 - Quality of the participation of women/men in the definition and development of the service package provided by the project
-

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GTZ web sites

Pilot programme Gender
http://www.gtz.de/gender_project

Sector project Legal and social policy
services for women
http://www.gtz.de/women_law/english/

Relevant web sites

UNIFEM
<http://www.undp.org/unifem>

WomenWatch
<http://www.un.org/womenwatch/>

GenderNet
<http://www.worldbank.org/html/prmge>

British Council
Social Development and Gender
<http://www.britcoun.org/social/index.htm>

BRIDGE
Briefings on Development and Gender
<http://www.ids.ac.uk/bridge/>

The African Gender Institute (AGI)
<http://www.uct.ac.za/org/agi>

Women's Net
<http://www.womensnet.org.za>

International Centre for
Research on Women (ICRW)
<http://www.icrw.org/content.htm>

Comunicacion e Información
de la Mujer (CIMAC)
<http://www.cimac.org>



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1. Hier kommt die Kapitelüberschrift hin