

# Gender mainstreaming strategies in decent work promotion: Programming tools

## GEMS TOOLKIT





Gender mainstreaming strategies  
in decent work promotion:  
Programming tools

**GEMS** *TOOLKIT*

Copyright © International Labour Organization 2010  
First published 2010

Publications of the International Labour Office enjoy copyright under Protocol 2 of the Universal Copyright Convention. Nevertheless, short excerpts from them may be reproduced without authorization, on condition that the source is indicated. For rights of reproduction or translation, application should be made to ILO Publications (Rights and Permissions), International Labour Office, CH-1211 Geneva 22, Switzerland, or by email: [pubdroit@ilo.org](mailto:pubdroit@ilo.org). The International Labour Office welcomes such applications.

Libraries, institutions and other users registered with reproduction rights organizations may make copies in accordance with the licences issued to them for this purpose. Visit [www.ifrro.org](http://www.ifrro.org) to find the reproduction rights organization in your country.

---

Gender mainstreaming strategies in decent work promotion: programming tools; GEMS toolkit / ILO Regional Office for Asia and the Pacific. – Bangkok: ILO, 2010  
iii, 87 p.

ISBN: 9789221238690; 9789221238706 (web pdf)

ILO Regional Office for Asia and the Pacific

gender equality / gender mainstreaming / womens empowerment / decent work

04.02.3

*ILO Cataloguing in Publication Data*

---

The designations employed in ILO publications, which are in conformity with United Nations practice, and the presentation of material therein do not imply the expression of any opinion whatsoever on the part of the International Labour Office concerning the legal status of any country, area or territory or of its authorities, or concerning the delimitation of its frontiers.

The responsibility for opinions expressed in signed articles, studies and other contributions rests solely with their authors, and publication does not constitute an endorsement by the International Labour Office of the opinions expressed in them.

Reference to names of firms and commercial products and processes does not imply their endorsement by the International Labour Office, and any failure to mention a particular firm, commercial product or process is not a sign of disapproval.

ILO publications and electronic products can be obtained through major booksellers or ILO local offices in many countries, or direct from ILO Publications, International Labour Office, CH-1211 Geneva 22, Switzerland, or ILO Regional Office for Asia and the Pacific, 11<sup>th</sup> Floor, United Nations Building, Rajdamnern Nok Avenue, Bangkok 10200, Thailand, or by email: [BANGKOK@ilo.org](mailto:BANGKOK@ilo.org). Catalogues or lists of new publications are available free of charge from the above address, or by email: [pubvente@ilo.org](mailto:pubvente@ilo.org)

Visit our website: [www.ilo.org/publns](http://www.ilo.org/publns)

---

Printed in Thailand

# CONTENTS

|   | <i>Page</i> |
|---|-------------|
| About the GEMS Toolkit .....  | 1           |
| <b>Gender Mainstreaming Strategies (GEMS) Tools</b>                       |             |
| 1. Key concepts and strategies .....                                      | 9           |
| 2. GEMS in Decent Work Country Programmes .....                           | 22          |
| 3. How to review GEMS in your organization .....                          | 27          |
| 4. GEMS in research .....   | 32          |
| 5. GEMS in project design and implementation .....                        | 37          |
| 6. GEMS in indicators, monitoring and evaluation .....                    | 43          |
| 7. Gender budgeting .....   | 51          |
| 8. GEMS in human resource management and development .....                | 58          |
| 9. GEMS in meetings and training .....                                    | 62          |
| 10. How to make media products and processes gender-responsive .....      | 67          |
| 11. GEMS in the working environment .....                                 | 73          |
| 12. Key international labour standards for gender equality in brief ..... | 79          |
| <b>ANNEXES</b>  |             |
| Annex 1 Glossary .....  | 83          |
| Annex 2 ILO standards of specific relevance to gender equality .....      | 87          |



# About the GEMS Toolkit

---

***Equality empowers women and men  
It is the RIGHT and the SMART thing to do***

- **Why is it the RIGHT thing to do?** Too many women and men, girls and boys endure discrimination, injustice, unfair treatment, and loss of opportunities to advance in life just because they have been born female or male. This violates the universal, common sense of natural justice, and diminishes individuals' and societies' chance to full happiness, peace and harmony. Every human being has a fundamental right to enjoy equal opportunity and treatment in life and at work.
- **Why is it the SMART thing to do?** Countries which let investments in girls' education go to waste and condone discrimination at work, compromise the competitiveness of their economies. Gender equality is vital for efficient labour markets. Families, workplaces and societies are more productive and prosperous when they reap the full potential and talents of all. It makes good business sense to reward workers on their merit rather than their sex, colour or race.

## 1. What is the GEMS Toolkit?

The GEMS Toolkit (*Gender mainstreaming strategies: Programming tools*) is a set of 12 practical tools to facilitate the implementation of Gender Mainstreaming Strategies (GEMS) in organizations, policies, programmes and projects.

The GEMS Toolkit aims to share knowledge, skills and tools with ILO constituents and partners in the Asia-Pacific region and worldwide on how to:

- do a gender analysis of their work and their organization
- put gender in the mainstream of policies, programmes and projects
- carry out gender-specific action to redress inequalities.

The tools in the GEMS Toolkit have been designed in the form of quick reference guides, checklists and tips for ease of use. The first tool gives an overview of key concepts and definitions concerning gender equality and gender mainstreaming strategies in the world of work. The other GEMS tools are organized by topic, addressing gender concerns in (country) strategy development on decent work, in organizations, research, the design, implementation, monitoring and evaluation of programmes and projects, in budgeting, human resource development, media products and processes, meetings and training, and in the working environment. They conclude with a summary of four main international labour standards for gender equality (see the brief content of each tool in Section 6 below).

The Toolkit is available in two formats:

- a ring binder with the complete set of guides, checklists and tips
- a desk calendar, the 'GEMS Toolkit' in Brief, with the main gender pointers of each tool.

## 2. Who can use it?

This GEMS Toolkit is designed for ILO constituents and partner organizations. These include, for example: ministries of labour, human resources, social security, social welfare, interior, planning and finance, women and gender equality, education and training, indigenous populations; employers' and workers' organizations, non-governmental organizations, community-based organizations, business or other member-based associations, and consultancy firms.

Intended users are managers, professionals and specialists in the labour field, for example, directors, division heads, office, programme and project managers, technical officers, programming officers, lawyers, labour inspectors, trade unionists, employers, officers in charge of personnel, training, labour, social and women's affairs, and ILO staff.

## 3. Why need it?

Since its founding in 1919, the ILO has been committed to promoting the rights of women and men in the world of work and to achieving equality. Sex discrimination frequently interacts with other forms of discrimination and these lead to cultural, economic and social barriers. These barriers must be identified and overcome so that all actors of society can contribute to and participate in the generation of income and wealth, as well as enjoy the benefits from it. Promoting equality is anchored in both a rights-based and an economic efficiency approach. The ILO, as many other international, national and local development actors, promotes gender equality not only as a basic human right, but because it is essential to achieving the global goals of decent work and living for all.

While progress is being made, social and economic indicators continue to point to persistent gender inequalities in the world of work. Progressive improvements in reaching parity gender goals in education have not yet translated into more equal outcomes in the labour market. Gender inequalities, such as unequal opportunity and treatment between men and women in employment, discrimination, the gender pay gap, inadequate maternity protection, work-family conflicts and heavy workload of women workers remain pervasive and persistent despite economic growth and women's high participation rates in the labour force in many countries in the region.

Economic progress by itself does not lead to automatic improvements in the quantity and quality of income earning opportunities and jobs, particularly for women. In fact, the level of socio-economic development and countries' performance on equality and social justice indicators are not strongly correlated. This suggests that a country's development goals, laws, policies and practices relating to the promotion of equal chances in life for its people and fair income distribution are vital.<sup>1</sup>

"Gender equality is now globally accepted as a necessity for sustainable development and poverty reduction for women and men, improving living standards for all."<sup>2</sup> It is vital for productive economies, profitable businesses and realizing people's full potential and happiness.

---

<sup>1</sup> N. Haspels and E. Majurin: *Work, income and gender equality in East Asia: Action guide* (Bangkok, ILO, 2008).

<sup>2</sup> ILO: "Resolution concerning Gender Equality at the Heart of Decent Work", in *Provisional record*, International Labour Conference, 98<sup>th</sup> Session (Geneva, 2009).



Many commitments have been made to promote equality between men and women at the international, national and local levels over the past 30 years. However, the translation of policy commitments on gender equality into changes in organizational practices to achieve gender equality goals continues to be a challenge. Labour institutions, be it in government or representing employers and workers – just like many other organizations – are characterized by ingrained attitudes and institutional practices which hamper gender equality. For example, women are underrepresented at the decision making levels and for this reason their priorities and interests are not included on policy agendas.

Evaluations<sup>3</sup> by the ILO, World Bank, UNDP, UNRISD and other donor agencies have shown that:

- A majority of planning and policy documents reviewed were gender blind.
- Much confusion remains among UN, government and civil society organization professionals about gender related concepts, terminology and strategies.
- Many work units lack gender equality objectives and indicators.
- Capacity building to assist staff and partners in gender analyses and planning tends to be ad hoc.

In this context, the ILO has been called upon to provide technical assistance on incorporating gender mainstreaming strategies in the substance, structure and staffing of organizations which promote decent work. There is a need for specific and targeted capacity building interventions to mainstream gender in the policies, programmes, projects and institutional mechanisms of labour institutions, employers' and workers' organizations, and to assist women's machineries and gender networks in understanding and advocating decent work and fundamental principles and rights at work.

#### 4. How did it come about?

Equality for women and men in the world of work is a core value of the ILO, anchored in both a rights-based and an economic efficiency approach. The common goals of eliminating discrimination in employment and promoting equality and decent work for men and women are reflected in the 1998 ILO Declaration on Fundamental Principles and Rights at Work and the 2008 ILO Declaration on Social Justice for a Fair Globalization in line with the commitments to gender equality and women's empowerment laid down in the Millennium Development Goals (MDGs).

Following the call for gender mainstreaming at the 1995 Beijing World Conference for Women, the International Labour Office established an ILO Policy on Gender Equality and Gender Mainstreaming in 1999 to "ensure that commitment to gender equality is internalized throughout the ILO and reflected in all our technical work, operational activities and support services."<sup>4</sup> Several time-bound Office Action Plans for Gender Equality followed and, since 2007, these are approved and reviewed by the ILO Governing Body

The ILO constituents in Asia and the Pacific confirmed the importance of promoting gender equality, women's empowerment and equality of opportunity to decent and productive work at the 2001 and 2006 Asian Regional Meetings.<sup>5</sup> In 2004, the ILO Regional Office for Asia and

---

<sup>3</sup> ILO: *ILO Gender audit 2001-2002: Final report* (Geneva, 2002); UNDP: *Evaluation of gender mainstreaming in UNDP* (New York, 2006); World Bank: *Evaluating a decade of World Bank gender policy: 1990-1999* (Washington, D.C., 2005); United Nations Research Institute for Social Development: *Gender equality: Striving for justice in an unequal world* (Geneva and New York, 2005).

<sup>4</sup> ILO: *Gender equality and mainstreaming in the International Labour Office*, Circular No. 564, Geneva, December 1999.

<sup>5</sup> ILO, *Report and conclusions of the 13<sup>th</sup> Asian Regional Meeting (ARM)* held in Bangkok from 28-31 August 2001, GB282-3-2001-09-0325-1-En.Doc: p. 16; ILO, *Report of the 14<sup>th</sup> Asian Regional Meeting: Conclusions*, Busan, 29 August – 1 September 2006, AsRM/xiv/d.7 paragraph 12.

the Pacific adopted an *ILO Gender Mainstreaming Strategy (GEMS)*<sup>6</sup> to advance gender equality in the world of work. In response to requests for guidance on GEMS implementation, the Regional Office developed a GEMS Toolkit to help its constituents and staff with strengthening and expanding actions to address the needs of both men and women in their day-to-day work. The GEMS Toolkit proved popular and has been used in many countries. This is an updated and expanded edition, taking into account experience, lessons learned and good practices from Asia and other parts of the world.

## 5. How to use it?

The GEMS Toolkit is easy to use. The first and the last tool are about content. Tool 1 provides the conceptual framework to understand why ideas on the roles of men and women can lead to problems and how to overcome these through strategic, practical action. Tool 12 gives an overview of international labour standards which are key to achieving gender equality. Tools 2 to 11 are programming tools to guide operations. They provide practical checklists and tips to review and learn how to increase the gender-responsiveness of development action at the various stages of the programming cycle and in operational activities.

Each of the GEMS tools can be used independently from one another, depending on the immediate tasks, concerns or needs of the users, for example, when they have been assigned to develop a project or to organize a meeting or media campaign. Other tools can then be consulted as needed. From the checklists in each tool, users can find out whether they are on the right track or whether there are gender concerns that need to be addressed. The tips provide pointers on how to carry out remedial action.

When a problem has been identified, for instance, women are targeted end-beneficiaries but are not reached, the user will need to consult Tool 1 to learn about strategic solutions to problems and good practices which have emerged from international and national experiences in all parts of the world. The next step consists of starting a consultation process with the stakeholders and male and female intended beneficiaries themselves, possibly with the help of gender experts to develop tailor-made solutions to the situation at hand, and to set clear aims, indicators and targets to measure progress towards more equitable outcomes along the way. This consultative process is vital for success as men and women both need to be committed to achieve change toward more just and equal gender relations and fair sharing of workload, resources and benefits.

The tools are best used at the start of the planning and design stages of any action, but can be used at any stage, during implementation, monitoring or evaluation. The Toolkit can also be used in awareness raising and training on gender equality promotion in organizational change processes. For example, the checklists can serve as exercises, and the tips and guides are handy for drawing out key messages in participatory learning and training. The Toolkit complements the ILO gender audit manual and will be useful for gender audit facilitators.<sup>7</sup>

The terms programmes and/or projects are used interchangeably throughout the Toolkit as a group name for programmes, projects and all other types of operational activities, such as 'umbrella' projects, sub-projects, sub-programmes, major programmes, etc. A glossary with the main terms and definitions is given in Annex 1.

---

<sup>6</sup> The regional GEMS Action Plan covered 2004-2007; it was succeeded by the Office-wide Action Plans for Gender Equality thereafter.

<sup>7</sup> ILO, *A manual for gender audit facilitators: The ILO participatory gender audit methodology* (Geneva, 2007).

## 6. Structure and content of the 12 GEMS tools

The GEMS Toolkit contains 12 practical tools organized by topic. With the exception of tools 1 and 12, each tool typically contains three main sections:

- About this tool
- Key concepts and rationale
- Checklist(s) and tips.


|                |  |
|----------------|--|
| <b>Tool 1</b>  | <b>Key concepts and strategies:</b> Quick reference guide on key gender concepts and definitions, key gender mainstreaming strategies (GEMS), approaches and steps; and summary GEMS checklist   |
| <b>Tool 2</b>  | <b>GEMS in Decent Work Country Programmes (DWCPs):</b> Guide and checklist for conducting gender analysis, planning, institutional capacity building and budgeting in a DWCP; summary of ILO policy guidance on the integration of GEMS in technical cooperation   |
| <b>Tool 3</b>  | <b>How to review GEMS in your organization:</b> Checklists for assessing GEMS capacity in an organization and finding out how effective it is or could become in using GEMS strategies and how it engages and treats men and women in its work   |
| <b>Tool 4</b>  | <b>GEMS in research:</b> Checklist for integrating a gender dimension in research content and processes; tips on when to have a clear gender focus in the research design and how to spot the early warning signs of gender inequalities   |
| <b>Tool 5</b>  | <b>GEMS in project design and implementation:</b> Checklist and tips on how to integrate GEMS in all stages of the programming cycle: problem analysis, strategy development, identification of the target groups, institutional framework, development of objectives and outcomes, outputs, activities, indicators, monitoring and evaluation, and inputs   |
| <b>Tool 6</b>  | <b>GEMS in indicators, monitoring and evaluation:</b> Tips on designing gender-responsive quantitative and qualitative indicators; checklists to assess gender responsiveness of a monitoring and evaluation system, evaluation criteria and evaluation processes  |
| <b>Tool 7</b>  | <b>Gender budgeting:</b> Introduction to gender budgeting concepts and an overview of tools used in gender budgeting and gender budget analysis  |
| <b>Tool 8</b>  | <b>GEMS in human resource management and development (HRD):</b> Checklist to assess GEMS in HRD structure and processes, e.g. gender balance in staffing, equal pay, job descriptions, hiring and recruitment procedures, and staff appraisals; tips on implementing GEMS in HRD procedures and practices, and examples of ILO gender equality standard clauses in TOR and external collaborator contracts                                   |
| <b>Tool 9</b>  | <b>GEMS in meetings and training:</b> Checklist to assess GEMS in the planning, preparation, implementation and reporting of a meeting or training event; tips on how to ensure equal male-female participation in meetings and training, when to have separate meetings for women and for men, how to increase women's participation and how to make gender everybody's business; examples of gender equality clauses in invitation letters |
| <b>Tool 10</b> | <b>How to make media products and processes gender-responsive:</b> Checklist for assessing gender responsiveness of media products, core media messages and production and distribution of media products; standard gender equality statements used in ILO media products and tips for effective gender advocacy in the media  |

**Tool 11**     **GEMS in the working environment:** Checklist to assess to what extent a workplace is family-friendly and supportive at the policy and at the practical levels; information and tips on how to make workplaces more gender equal and how to promote respect and prevent violence and harassment at the workplace

**Tool 12**     **Key labour standards for gender equality in brief:** Summary of ILO fundamental principles and rights at work and key ILO standards on gender equality: Equal Remuneration Convention, 1951 (No. 100), Discrimination (Employment and Occupation) Convention, 1958 (No. 111), Workers with Family Responsibilities Convention, 1981 (No. 156), and Maternity Protection Convention, 2000 (No. 183).

## 7. Acknowledgements

The main authors of this Toolkit are Nelien Haspels and Busakorn Suriyasarn. Many thanks go to Naomi Cassirer, who co-authored the 2004 version, Jyoti Tuladhar, Reiko Tsushima, Parissara Liewkeat, Annemarie Reerink, Aya Matsuura, Seltik Heng, Nguyen Kim Lan, Geir Tonstol, Eva Majurin and Tim De Meyer for their comments and contributions to field testing, validation and revision. The Toolkit is a collaborative effort of the ILO field gender network in Asia and the Pacific and the Bureau for Gender Equality, ILO Geneva.



Gender Mainstreaming Strategies (GEMS)  
**TOOLS**




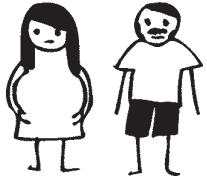
# Tool 1. Key concepts and strategies

## 1.1 About this tool<sup>8</sup>

This tool is a quick reference guide on key gender concepts and definitions, as well as key gender mainstreaming strategies (GEMS), approaches and steps. It gives a summary checklist on the 'what' and the 'how' of gender equality promotion. It can serve as a quick refresher for your own use or as a tool in awareness raising or training activities.

## 1.2 Basic concepts and definitions

### 1.2.1 Gender

| What is 'gender' and what is 'sex'?   |   |
|---|---|
| <p><b>Gender</b> refers to the <b>social differences</b> and relations between men and women, girls and boys, that are learned, vary widely within and between cultures, and change over time.</p>  <p>Boys and girls learn about gender rules and relations while they are growing up. These rules determine what chances they will have in life.</p> <p>Gender is an <b>important variable in society</b> and is affected by other variables such as age, class or caste, race or ethnicity, or disability, and by the geographical, economic and political environment.</p> | <p><b>Gender is different from sex.</b><sup>9</sup></p> <p><b>Sex</b> is about <b>biological differences</b>. People are born male or female. With very few exceptions they remain male or female throughout their lives in terms of their biological make-up. The biological differences between men and women are universal and are generally difficult to change.</p> <p>Unlike gender, sex differences are not affected by history or culture. For example, at all times in history and in all societies it remains true that only women can give birth and breastfeed and only men can produce sperm and grow a beard.</p>  |

<sup>8</sup> The main sources of the concepts and definitions in this tool are: N. Haspels and B. Suriyasarn: *Promotion of gender equality in action against child labour and trafficking: A practical guide for organizations* (Bangkok, ILO, 2003); B. Suriyasarn, R. Terhorst and N. Haspels: *Empowerment for children, youth and families: 3-R trainers' kit on rights, responsibilities and representation* (Bangkok, ILO, 2006); ILO: *A manual for gender audit facilitators: The ILO participatory gender audit methodology* (Geneva, 2007); ILO: *ABC of women workers' rights and gender equality*, 2<sup>nd</sup> ed. (Geneva, 2007); Ministry of Women, Family and Community Development and UNDP: *Manual on gender budgeting in Malaysia* (Kuala Lumpur, 2005), pp. 9-12; Department for International Development (DFID): *Gender manual: A practical guide for development policy makers and practitioners* (London, 2002); ILO: *The ILO action plan for gender equality, 2008-2009* (Geneva, 2007); and ILO: *Equality at work: Tackling the challenges* (Geneva, 2007).

<sup>9</sup> In recent years the term 'gender' has started to replace the term 'sex'. However, it is useful to distinguish between sex – biological functions which do not change, and gender – social roles and relations which can and do change all the time.

## What are gender roles, values, norms and stereotypes on masculinity and femininity?

### Femininity and masculinity

People from different cultures and traditions usually have different ideas and expectations about the characteristics, abilities and likely behaviour of women and men—or femininity and masculinity.

Ideas on femininity and masculinity may be restrictive and limit the potential of both women and men. They are often not in line with reality and may not reflect the actual contributions men and women make.



**Gender roles** refer to the activities that men and women actually do. Gender roles can be flexible or rigid. They vary according to individual characteristics of people, and change over time. For example, in many traditional societies the roles of men and women are segregated by sex with men working outside the house and women responsible for family and household duties at home. In other societies the roles of men and women are increasingly interchangeable with men sharing household work and more women as main income earners in the family.

**Gender values and norms** on masculinity and femininity in society refer to ideas that people have on what men and women should be like. For example, in many societies women should be feminine: beautiful, obedient and good housewives. Men, on the other hand, are expected to be masculine: strong, brave and leaders of the family and community.

**Gender stereotypes** are the ideas that people have on what boys and men, girls and women are capable of doing, for example, women are better housekeepers and men are better leaders. While stereotypes may sometimes be true, they are often proven false.

## 1.2.2 Equality and discrimination

### What are 'gender equality', 'gender equity' and 'gender justice'?

**Equality at work** is a fundamental value and principle enabling workers to claim a fair share of the wealth which they help generate. Everybody needs to be given freedom to reach their full potential in life and in work.

**Gender equality**, or **equality between men and women**, refers to the enjoyment of equal rights, opportunities and treatment by men and women of all ages in all spheres of life and work. It implies that all human beings are free to develop their personal abilities and make choices without the limitations set by stereotypes and prejudices about gender roles or the characteristics of men and women. It means that the different behaviour, aspirations and needs of women and men are considered, valued and favoured equally. It does not mean that women and men are the same or have to become the same, but that their rights, responsibilities, social status and access to resources do not depend on whether they are born male or female.

In sum, gender equality is the goal defined as **equal opportunity and treatment of both sexes**, so that women and men can participate in, decide on and benefit from development on equal footing. Gender equality is a matter of human rights and social justice but also of economic efficiency. It makes good business sense, and is essential for sustainable development and poverty reduction.



**Gender equity** is about equality of outcomes and results. It is a means to ensure that women and men, girls and boys have an equal chance not only at the starting point but also when reaching the finishing line. It is about **the fair and just treatment of both sexes** that takes into account the different needs and interests of men and women, cultural barriers and (past) discrimination of specific groups.

The need for gender equity measures is illustrated by the following fable about a stork and a fox:<sup>10</sup>



*Once upon a time there were a stork and a fox. The fox invited the stork to its house for dinner. Food was served in a dish, so the stork with its long beak could not eat it very well.*

*The following day, the stork invited the fox to its house for dinner. Food was served in a long vase, so the fox with its short tongue could not eat it.*



**Gender justice** is about the ending of, and the provision of redress for, inequalities between women and men that result in the subordination of women to men. The gender justice approach pursues gender equality with an emphasis on transforming unequal power relations between the sexes. Priorities include advancing women's rights and access to resources on an equal footing with men; building women's voice and 'agency' – ability to make choices; creating women's access and influence in policy and decision making institutions and making social, economic and political institutions responsive and accountable to women.<sup>11</sup>

### What is gender equality promotion?



#### Promoting gender equality and decent work means:

- ✓ Equal opportunity and treatment for men and women in employment and occupation, and fair and just outcomes for both sexes
- ✓ The same human and workers' rights for men and women
- ✓ Equal value and fair distribution between women and men of responsibilities and opportunities, paid and unpaid work, decision making, and income.

**Promoting gender equality** is not a 'women's concern' but the **responsibility of all in society**. It is both the **right** and the **smart thing** to do, because it leads to a higher quality of life for all.

<sup>10</sup> Gender and Development for Cambodia (GAD/C): *Gender awareness handbook* (Phnom Penh, 2001).

<sup>11</sup> For more information see Gender Justice publications of the United Nations International Development Research Institute, Ottawa, Canada; and the Institute for Development Studies and the University of Sussex, UK.

## What is discrimination?

**Discrimination** is defined in the Discrimination (Employment and Occupation) Convention, 1958 (No. 111), as *any distinction, exclusion or preference based on race, colour, sex, religion, political opinion, national extraction or social origin which nullifies or impairs equality of opportunity or treatment in employment or occupation* (Art 1 (1a)). In many countries, discrimination in employment is also prohibited on other grounds, such as age, migrant or marital status, maternity or family responsibilities, sexual orientation, disability or infectious diseases like HIV and AIDS.

Convention No. 111 prohibits any form of *direct* and *indirect* discrimination:

- **Direct discrimination** exists when unequal treatment between workers of different race, colour, sex or any other ground covered by the Convention stems directly from laws, rules or practices making an explicit difference between workers on these grounds. For example, a labour code providing that women shall receive less pay than men because of their sex, laws which do not allow women to sign contracts but allow men to do so, or job advertisements which specify the appearance and sex of the candidates.
- **Indirect discrimination** means rules and practices which appear neutral but in practice lead to disadvantages primarily suffered by persons of one sex, race, colour or other characteristics. For example, paying women less than men for the same job or setting job requirements or criteria for pay which are seemingly neutral but are irrelevant to the job (such as requiring a minimum height or weight for a manager) and in practice exclude a large percentage of female or male applicants.

Employment practices are not considered to be discriminatory when based on the actual and real needs of a job, for example, employing male and female attendants in bathrooms for the respective sexes.

Different treatment or opportunities for specific groups of people is also allowed – and often called for – if their objective is to:

- ✓ protect certain groups of workers on special grounds, for example, the protection of the reproductive function of all male and female workers of child bearing age, or prohibition of child labour
- ✓ promote equality by affirmative or positive action. This includes special temporary measures to redress the effects of past or continuing discrimination with a view to establish equality of opportunity and treatment in practice, or in other words, leveling the playing field for the underrepresented or disadvantaged group (see 1.3.3 Key GEMS steps).

Discrimination usually does not come as a stand-alone event, and is not an exceptional or aberrant occurrence, resulting from isolated acts of an individual employer or worker. It is a systematic phenomenon, deeply embedded in the way organizations function, laws and rules are applied and workplaces operate – known as **structural discrimination**. Persons who face discrimination in job recruitment, often continue experiencing discrimination while in the job. Repeated experiences with discrimination are internalized, leading to a vicious cycle of cumulative disadvantage.

**Sex or gender discrimination**<sup>12</sup> is any distinction, exclusion or preference based on sex or gender values, norms or stereotypes, which has the effect of nullifying or impairing equality of opportunity and treatment. In most countries, discrimination based on sex is prohibited by law. In practice, however, women in both developing and industrialized countries continue to encounter discrimination in one form or another in life and at work.

<sup>12</sup> Most laws and legal texts use the term *sex discrimination*. However, some laws now also use the term *gender discrimination*. In this Toolkit either one or both terms are used depending on the context.

### 1.2.3 Rights and responsibilities

#### What are fundamental human rights and national legal rights?

**Human rights** are the basic and absolute rights agreed and defined at the international level that each person has because she or he is a human being. Human rights recognize the vulnerability of human beings in civil, political, economic, social and cultural processes and provide protection against violation. Every human being has these rights although the extent to which they are enforced in practice varies from country to country.

At the international level most of the basic human rights have been described in the United Nations Universal Declaration of Human Rights (1948). Basic human rights include the rights to:

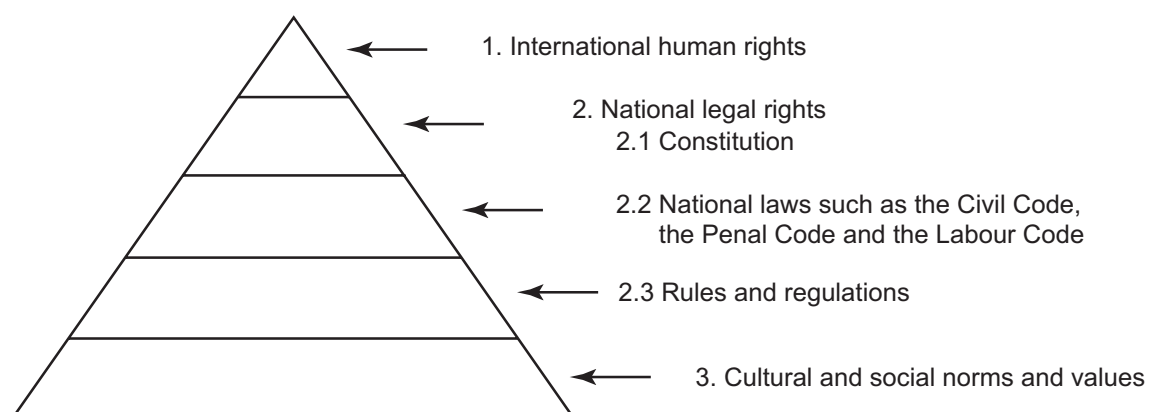
- ✓ equal treatment and non-discrimination
- ✓ own property
- ✓ work and adequate conditions of work
- ✓ equal access to public service in the country
- ✓ freedom of thought, opinion and expression
- ✓ nationality
- ✓ education
- ✓ freedom from slavery and forced labour
- ✓ freedom of movement
- ✓ freedom of association
- ✓ freedom of religion
- ✓ justice for the law

**National legal rights** are the rights to which each citizen in each country is entitled, that are defined by national laws of that country, usually consisting of constitutional rights, rights laid down in national legislation such as the Penal Code, the Labour Code and the Civil Code and implementing rules such as government regulations.

**Cultural and social norms and values** give rise to the rule of law developed in each society. They underlie the hierarchy of rights and often determine whether the rule of law is followed. Sometimes there is a conflict of interest in respecting rights. For example, the 'right to development' for all citizens cannot be met by many governments due to the different political stakeholders within that government and their willingness to distribute the benefits of development.

#### Rights hierarchy

A 'rights' pyramid can be established as follows:



This rights hierarchy is based on European legal systems adopted by most but not all countries. For example, in some Islamic countries religious laws form the top of the pyramid. In other countries a 'common law' also exists based on traditional customs.

### What are fundamental rights at work?

**Fundamental rights at work** are:

- ✓ the elimination of all forms of forced and compulsory labour
- ✓ the abolition of child labour
- ✓ the elimination of discrimination in respect of employment, occupation and income
- ✓ freedom of association and the recognition of the right to collective bargaining.

**Fundamental rights that are crucial for gender equality and women workers** are:

- ✓ equal opportunity and treatment between men and women in employment
- ✓ equal pay for work of equal value
- ✓ better work-life balance between men and women with and without family responsibilities
- ✓ maternity protection.

See Tool 12 for more information on international labour standards on gender equality.

## 1.2.4 Decent work and gender mainstreaming

### What is decent work for men and women?

**Decent work** is productive work performed in conditions of freedom, equity, security and human dignity, to which women and men have access on equal terms. Decent work is about:

- ✓ respect for the rights at work laid down in international labour standards
- ✓ access to employment with decent income and working conditions
- ✓ social protection: safe work and social security
- ✓ representation and voice in decision making through social dialogue
- ✓ addressing both women's and men's needs, perspectives and priorities in the above.

Decent work sums up the aspirations of people in their working lives. It involves opportunities for work that is productive and delivers a fair income. It includes safe work and social protection for families, better prospects for personal development and social integration, freedom to express concerns, organize and participate in decision making, as well as non-discrimination and equality of opportunity and treatment for women and men.

Economic growth on its own is not enough to end poverty. Achieving this requires development that is equitable, inclusive and sustainable. Decent work provides a path to this and is therefore crucial to reducing poverty.<sup>13</sup>

**Gender equality in the ILO Decent Work Agenda** is about:

- ✓ equality of opportunity and treatment in employment
- ✓ equal remuneration for work of equal value
- ✓ equal participation and representation in governance and decision making processes and mechanisms in the economic, social and labour fields
- ✓ freedom of association and protection of the right to organize
- ✓ a balance between work and family life that is fair to both men and women
- ✓ equal access to safe work and to social security, including maternity protection
- ✓ equality in obtaining a meaningful career development.

<sup>13</sup> ILO, *Decent Work and the Millennium Development Goals*, brochure, Decent Work for All – Asian Decent Work Decade 2006-2015.

## What is Gender Mainstreaming?

Gender mainstreaming was adopted as the main strategy for promoting gender equality at the global and national levels at the Fourth World Conference on Women in Beijing in 1995. The United Nations Economic and Social Council (ECOSOC) defines **gender mainstreaming** as:

- *the process of assessing the implications for women and men on any planned action, including legislation, policies or programmes, in any area and at all levels*
- *a strategy for making the concerns and experiences of women as well as of men an integral part of the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and societal spheres, so that women and men benefit equally, and inequality is not perpetuated*
- *The ultimate goal of mainstreaming is to achieve gender equality (Agreed Conclusions E/1997/L.30, p. 2).*

## 1.3 Key GEMS perspectives, strategies and steps

### 1.3.1 Perspectives and approaches to tackling gender inequality

#### Protection, equality promotion and positive action: Issues and when to do what

Many different strategies have been developed and applied over the years to eliminate sex discrimination and promote equality between men and women. The decision on which strategy to use depends on the underlying perspectives and assumptions as to what causes inequalities and the goals set to achieve. Overall, three main **perspectives to gender equality** can be distinguished:<sup>14</sup>

- **Sameness Perspective** – This perspective considers that women and men are the same, and therefore should be treated in the same manner regardless of the biological and gender differences between the two. This approach disadvantages women as it is ‘gender blind’. Women are overly burdened in trying to achieve male standards when in fact the social and economic reality of women is not similar to that of men. Disadvantaged by subordinate gender roles, multiple responsibilities and lack of access to resources, only few, privileged women are able to compete with men on an equal footing.
- **Protectionist Perspective** – This perspective recognizes the differences between men and women, but aims to protect women, who are perceived as ‘the weaker sex’, from areas which are considered to be ‘unsafe’, ‘unsuitable’, or ‘inappropriate’ for them. In practice this results in barring women from doing certain things ‘for their own good’. Some countries, for example, prohibit women from night work. This approach assumes that all women need protection from sexual harassment. It perpetuates sex discrimination in the guise of protection rather than challenging the causes of the subordination of women and providing all workers with safe work.
- **Equality in Outcomes Perspective** – This perspective is corrective. It recognizes the differences between men and women and at the same time underlines the importance of equality between the two. It analyzes why these differences exist and what the inequalities are. It aims at equality of outcomes, and seeks to eliminate discrimination of the disadvantaged groups through corrective and positive measures at the individual, institutional and societal levels. This approach is adopted in international law such as the Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) and the ILO international labour standards.

<sup>14</sup> Adapted from Partners For Law in Development & UNIFEM, *CEDAW: Restoring rights to women* (New Delhi, 2004), pp. 24-25.

## Protection and equality promotion<sup>15</sup>

International labour standards for women workers have been prompted by the dual concerns of protecting women workers from arduous conditions and ensuring equality with men in opportunity and treatment at work. Initially the emphasis was on the first objective but attention has subsequently shifted to the promotion of equality. Two types of special measures are generally needed for gender equality, women's empowerment and the advancement of women and men: protective measures to safeguard workers' reproductive functions, and affirmative or positive action measures to overcome the effects of (past) discrimination.

**Protective measures for women** may be broadly categorized as those aimed at protecting women's reproductive and maternal capacity and those aimed at protecting women because of gender perceptions and stereotypes about their capacities and appropriate roles in society. The latter category of measures has been a hot issue of debate: defended by some as necessary and criticized by others as contrary to the objective of equality.

It is generally recognized that measures which explicitly or implicitly aim at protecting the reproductive capacity of women are necessary for the achievement of true equality. This view is reflected in the ILO standards on women workers, in particular those dealing with:

- **maternity protection** – maternity leave, cash and medical benefits, health protection, employment protection and non-discrimination, and breastfeeding
- **provision of special conditions of work for pregnant women and nursing mothers** – nursing breaks, organization of hours of work, prohibition of night work and of work considered dangerous.

It is now widely acknowledged that the reproductive functions and rights of both women and men need to be protected. In addition, paternity leave is provided in an increasing number of countries to promote sharing of family responsibilities. However, diverging views continue to exist among ILO member States on limitations on the employment of women in certain occupations and jobs with a view to 'protect them' because of gender considerations. The debates have centered on prohibiting or allowing women, for example, in night or underground work, or other occupations or to migrate for work across national borders. Those in favour of prohibition state that this work is not suitable for women. Those against it argue that it limits women's access to work, does not take into account the capacities, preferences and abilities of individual women, and further marginalizes women workers in vulnerable employment, as the jobs go underground.

Within the international community, the trend is to extend equality through better labour protection, and ensure decent jobs and working conditions for all workers rather than making certain jobs illegal for women only as this may increase risks of labour exploitation of women. In the follow-up to CEDAW, the UN General Assembly requests governments to periodically review existing laws to protect women in the light of scientific and technological knowledge to decide whether such laws should be revised or extended. A similar approach was taken by the International Labour Conference in 1975 and reconfirmed in its equality resolution of 1985, as well as in advice to individual member States by the ILO Committee of Experts on the Application of Conventions and Recommendations (CEACR).

**Affirmative action** – also known as positive measures – are special, usually temporary, measures designed to redress the effects of past or continuing discrimination. The principle of special positive measures is reflected in Convention No. 111 (Art. 5) adopted in 1958, and was reconfirmed in 1996 and 2009.<sup>16</sup> Attitudes towards this type of measures differ considerably across member States and continue to be controversial. However, countries and public and

<sup>15</sup> ILO: *Women workers' rights: Modular training package, Module 2 – International Labour Standards on women workers* (Geneva, 1995), pp. 57-58.

<sup>16</sup> ILO: *ABC of women workers' rights and gender equality*, 2<sup>nd</sup> ed. (Geneva, 2007), pp. 17-19; ILO: "Resolution concerning Gender Equality at the Heart of Decent Work", in *Provisional record*, International Labour Conference, 98<sup>th</sup> Session, Geneva, 2009.

private sector organizations have increasingly started to adopt such measures because of evidence that the legal banning of discrimination in itself has not proved sufficient to create equity and achieve equality outcomes in the world of work.



Affirmative action measures are needed to put everybody on an equal footing, especially where ingrained social, political and economic inequalities are rooted in tradition and arise out of a history of oppression of one group by another. Positive action does *not* imply that its beneficiaries have something wrong with them or are disadvantaged by nature. Positive action is based on the recognition that inequalities have become entrenched in institutions and societies. In such cases positive action aims to address the failure of labour market institutions to provide equal and fair opportunities to all. A common means of affirmative action is setting specific goals, targets or quota for the participation of the disadvantaged or underrepresented groups.

Sex discrimination frequently interacts with other forms of discrimination, for example, on the grounds of age, ethnicity, or geographical and social origin such as migrant status. Equality strategies need to identify and address these various grounds of discrimination simultaneously.

### 1.3.2 Key GEMS strategies

#### What are the key Gender Mainstreaming Strategies (GEMS)?

**Gender Mainstreaming Strategies (GEMS)** aim at giving equal rights, opportunities and treatment to men and women as beneficiaries, participants and decision makers by:

- ✓ *Integrating **gender equality into the mainstream*** and including women's and men's priorities and needs systematically and explicitly in all policies, programmes, projects, institutional mechanisms and budgets
- ✓ *Designing and implementing **gender-specific*** measures to protect the reproductive rights of women and men and to redress the effects of past or continuing discrimination through the empowerment of one or the other sex – generally women, as they are more likely to experience social, political or economical constraints.
- ✓ *Addressing both **practical and strategic gender needs*** because the roles of men and women in the family and workplaces are different, therefore their needs are different.

☞ **Practical needs** are basic needs or survival needs, e.g. food, water, shelter, income, clothing and healthcare. Meeting practical needs is about improving living and working conditions of men and women.



☞ **Strategic needs** are the needs for equality and empowerment of both women and men, e.g. sharing of family care and decision making, equal access to education and training. Meeting strategic needs is about redressing inequalities.



### 1.3.3 Key GEMS steps

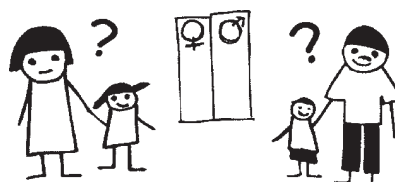
#### What are the key GEMS steps?

The following **key GEMS steps** need to be taken to bring gender issues into the **mainstream** in all policies, programmes and activities and to redress imbalances:

- Carry out a *gender analysis*
- *Plan gender action*, for example:
  - ✓ ensure *equal participation and equal distribution of resources* to men and women
  - ✓ conduct *gender-specific measures* in case inequalities need to be redressed
  - ✓ give girls and women *a voice*
  - ✓ start a *process of change* in organizational procedures and processes
  - ✓ carry out *gender budgeting and auditing*.

**Gender analysis** includes:

- ✓ collecting data which are *broken down* by sex
- ✓ analyzing such data to identify trends, patterns and inequalities
- ✓ identifying the *division of labour*, and access to and control over resources and benefits
- ✓ reviewing girls', boys', women's and men's *needs, constraints and opportunities*
- ✓ identifying challenges and opportunities in the *larger* environment
- ✓ reviewing the *capacities* of organizations to promote gender equality.



**Gender planning** is about:

- ✓ ensuring equal, fair and just participation, representation and distribution of resources to men and women
- ✓ redressing any imbalances and inequalities between women and men.

**Important steps** in gender planning are:

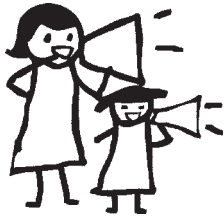
- **Gender-specific interventions**, measures or activities whenever one sex is in a particularly disadvantaged position. Early warning signs of the existence of gender inequalities are (see also Tip 4.3.3 in Tool 4):
  - ✓ sectors, industries, occupations and low income groups where *many* girls and women are found
  - ✓ sectors where girls and women are virtually *absent*
  - ✓ issues which especially *concern* girl and women workers (e.g. reproductive health, domestic violence).

They may include one or a combination of the following:

- *Positive or affirmative action* – temporary measure(s) to eliminate the effects of past or current discrimination (e.g. setting specific goals, targets or quotas for women in activities, sectors or levels where they have previously been excluded or underrepresented; fostering greater sharing of occupational, family and social responsibilities between men and women)
- *Women-specific activities* – needed when cultural norms and values restrict women's equal participation in activities for both sexes and used to enable women to develop and strengthen their self-esteem, to identify their constraints and to jointly develop means to overcome them (e.g. reproductive health training for women; career counseling and mentoring programmes for women)







- *Men-specific activities* – needed because men’s inputs and participation are essential to advance gender equality in partnership with women (e.g. reproductive health training for men; creating men’s networks to address violence against women)

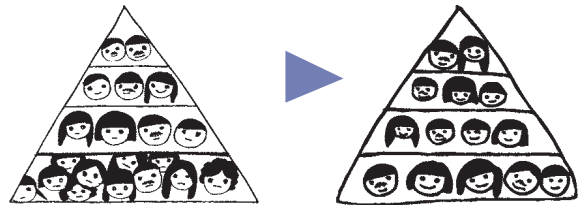
- **Giving girls and women a voice:**

- ✓ In general programmes, increase the *participation* of girls and women, and increase the *representation* of women in *governance and decision making mechanisms*
- ✓ In gender-specific programmes, increase the *participation* of men and boys
- ✓ Include two-thirds women in training and decision making, if they have been excluded from leadership positions, to redress the effects of (past) discrimination, or for rolemodel purposes
- ✓ Ideally, the male/female ratio of representation should be 50/50, but a range between 40 and 60 per cent is acceptable for equal representation. Avoid tokenism
- ✓ The ‘*minimum*’ rule: Ensure a representation rate of around 30 per cent of each sex, otherwise it is difficult for those in the minority to voice their concerns

See Tool 9 for further information.

- **Organizational change process:** Mainstream gender throughout an institution:

- ✓ adopt *explicit* policy, programme and budget procedures for the promotion of equality
- ✓ train staff at all levels and make them *accountable*
- ✓ set *targets* for gender-balance in staff recruitment and promotion
- ✓ allocate *sufficient human and financial* resources to finance equality promotion.



- **Gender budgeting and auditing**

**Gender budgeting:**

- ✓ is an integral part of GEMS
- ✓ aims to analyze the possible different impact of revenue and expenditure on men and women, boys and girls
- ✓ may involve re-allocation of revenues and expenditures and restructuring of budgetary processes to promote gender equality
- ✓ focuses on both the contents of the budget and the budgetary processes, involving both men and women at all stages.

**Gender audits<sup>17</sup>**

*Participatory gender audits* promote organizational learning at the individual, institutional and policy levels on how to mainstream gender effectively in practice. A participatory gender audit enhances the collective capacity of organizations to:

- ✓ examine its strategies and activities with a gender perspective
- ✓ identify strengths and weaknesses in promoting gender equality
- ✓ identify whether internal practices and related support systems for gender mainstreaming are in place and operational
- ✓ highlight good practices and make recommendations for gender equality promotion.

<sup>17</sup> ILO: *A manual for gender audit facilitators: The ILO participatory gender audit methodology* (Geneva, 2007).

## 1.4 GEMS summary guide

### Tip 1.4.1 GEMS pointers in brief

#### What to do

- Carry out a **gender analysis** and **disaggregate** all crucial data by sex before starting any interventions, and involve both women and men in the design process
- Plan **gender-specific interventions to redress inequalities**, and incorporate explicit action geared at promotion of gender equality in all development policies, programmes and other means of action
- Take gender equality concerns into account at the **highest** levels of policy, programme and budget formulation and at the **earliest** stages of the programming cycle
- Address both **practical** (short-term and immediate needs) as well as more long term, political and **strategic** needs (redressing inequalities) of women and men
- Target economic sectors and occupations where **many** women are found working because women's work is often invisible and not protected by legislation
- Target the **poorest** and most disadvantaged households where women and girls form the majority
- Redress **inequalities** in access of girls and women to quality education, training and decent work
- Stimulate the provision of **alternative livelihood** strategies to families prone to or already resorting to labour exploitation through their economic and social empowerment
- Pay attention to imbalances in **workload, decision making and income** among the target groups and promote the sharing of paid and unpaid work, such as family responsibilities as well as decision making processes within workplaces, families and communities.

#### How to do it

- Assess and strengthen the **capacity** of ILO partner organizations to address the needs of men and women workers and to promote gender equality
- Find solutions to address gender inequalities, for example, through gender-specific measures and direct action. Start with pilot projects to try out innovative new approaches, and expand successful initiatives into policies and programmes
- Increase **gender awareness** and enhance capacity and expertise on promoting gender equality among all stakeholders
- Seek the views and **perspectives** of gender experts and mobilize **women's** groups and organizations alongside groups and organizations dominated by **men**. For example, invite the national women's machinery, gender or women's units in trade unions and women in business associations to discussions and negotiations on employment and decent work
- Involve both **male and female representatives** of ILO constituents and other relevant partner organizations in the design, monitoring and evaluation of ILO-supported programmes and other means of action
- Ensure the **equal representation and active participation of women and men** at all levels and especially in decision making positions and mechanisms throughout the programming cycle.
- For long term action, develop a **network of organizations with expertise in both labour and gender** to share experiences and tools, and encourage cooperation and joint action among ILO constituents and other relevant partner organizations to promote gender equality in their work and in society.

*continued on page 21*

**Tip 1.4.1...** *from page 20*

- Ensure that managers have the **capacity** to manage the process of gender mainstreaming amongst their staff.
- Assign **responsibility** for the promotion of equality to all those involved in the programme and make all parties accountable
- If **imbalances** between men's and women's position exist, plan, budget and utilize specific gender expertise throughout the programming cycle
- Analyze the **different impact** of programmes on girls, women, boys and men at the monitoring and evaluation stages and develop appropriate follow-up action
- Promote the use of proper contracts and ensure the observance of **fundamental international labour standards** in personnel, equipment and subcontracting policies and procedures
- **Avoid** linguistic and visual biases and gender **stereotyping**.

## Tool 2. GEMS in Decent Work Country Programmes

### 2.1 About this tool<sup>18</sup>

This tool explains why it is important to use gender mainstreaming strategies (GEMS) in Decent Work Country Programmes (DWCPs). It summarizes ILO policy guidance on the integration of GEMS in DWCPs and in technical cooperation and provides the appraisal questions used for quality assurance in the ILO. The checklist and tips help you to assess how gender has been mainstreamed in DWCPs and give pointers for doing gender analysis and planning, institutional capacity building and budgeting in a DWCP.



#### Aims:

- To identify how gender mainstreaming strategies are integrated in a DWCP
- To improve GEMS action in a DWCP, including the technical cooperation projects in the country



**Users:** Managers, technical specialists, advisers and experts, programme and project managers and officers of the ILO and its partner organizations – constituents, implementing agencies and consultants.

### 2.2 Key concepts and rationale

#### Box 2.2.1

#### What is a Decent Work Country Programme?

A **Decent Work Country Programme (DWCP)** is the main instrument for defining and setting time-bound priorities for ILO action in each member State. It aims at helping constituents to promote the decent work agenda within their country, in line with the country's national development plans and poverty reduction strategies, UN development assistance frameworks and regional and international commitments.

Achieving the goal of decent work is about promoting opportunities for men and women to obtain productive work, in conditions of freedom, equality, security and human dignity. It entails the involvement of all actors (agencies, local and national governments,

workers', employers', community-based organizations and donors) at the macro, meso and micro levels.

The **ILO Decent Work Agenda** has five dimensions:

- right to employment with decent income and working conditions
- social protection: safe work and social security
- respect for labour rights as laid down in international labour standards
- representation and voice in decision making through social dialogue
- integration of gender equality and non-discrimination principles in the above at all levels

Sources: *ILO Declaration on Social Justice for a Fair Globalization*, International Labour Conference, Geneva, June 2008; and ILO, *Toolkit for mainstreaming employment and decent work for the United Nations system Chief Executive Board for Coordination* (Geneva, 2007).

<sup>18</sup> The main sources for this tool are: N. Haspels and R. Tsushima: *ILO-ROAP Gender equality mainstreaming strategies (GEMS) in Decent Work Country Programmes (DWCP) – A new GEMS tool* (Bangkok, ILO, 2006), unpublished document; and ILO: *ILO Decent Work Country Programmes: A guidebook, Version 2* (Geneva, 2008).

### Box 2.2.2 Why is it important to use GEMS in decent work country programming?

***GEMS make business sense and are a prerequisite for sustainable development.***

Development planning frequently uses 'gender neutral' approaches that assume men and women have the same needs and concerns. However, in most societies, **men and women experience poverty and decent work deficits differently.**

Men typically have greater access to resources and opportunities such as education and training, credit, capital, land and decision making authority in the workplace, community and the household. In contrast, women tend to have less access to productive resources and opportunities. As a result, 'gender neutral' approaches may actually disproportionately benefit men, and leave women's needs and concerns inadequately addressed.

It is important to use GEMS in decent work promotion because men and women:

- can have different perspectives and priorities concerning policies and programmes to reduce poverty and promote decent and productive work
- face different constraints in their efforts to improve their economic or social conditions
- are often affected differently by development interventions.

***Ignoring women's needs and capacities will hamper the efficiency and impact of policies and programmes and may exacerbate gender inequalities.***

Source: Adapted from: ILO Evaluation Unit (EVAL), *Evaluation Guidance: Considering Gender in Monitoring and Evaluation of Projects*, Geneva, 2007, p. 6.

## 2.3 Tip, guide and checklist

### Tip 2.3.1 GEMS pointers for DWCPs

**DWCPs are gender-responsive when they:**

- Include an analysis of the often-different needs and concerns of both men and women
- Reflect such analysis in country programme outcomes, strategies and indicators to show how these needs and concerns will be addressed.

**Key questions to answer:**

***What are the key gender dimensions in the DWCP problem analysis and strategic response?***

- Have you sought the views and priorities of male and female interest groups in designing the DWCP?
- Are data disaggregated by sex?
- What DWCP measures will be undertaken to promote gender equality and close gender gaps? Are women's and men's practical and strategic needs addressed? (see 1.3.2 Key GEMS strategies). How is this reflected at the outcome, output and activity levels?
- Do you need to build gender and decent work capacities in the country?
- Are the indicators gender-sensitive and are the targets disaggregated by sex?
- Will the budget allocations benefit men and women equitably? Are gender expertise and funding available for gender-specific action?

“Decent Work Country Programmes are to be gender-responsive and include, in the country context section, an analysis of the often-different needs and concerns of both women and men, and reflect such analysis in country programme outcomes, indicators and strategies to show how these needs and concerns will be addressed.

In order to ensure that Decent Work Country Programmes respond to in-country and global gender equality priorities, the Appraisal Checklist in the Decent Work Quality Assurance Framework asks:

- Are gender issues addressed and mainstreamed to contribute to gender equality?
- Are there adequate gender disaggregated problem analysis and strategic response?\*

In 2005 the ILO Governing Body decided to refer to the ILOs gender mainstreaming approach in the overall cooperation agreements signed between the ILO and donors, and called on the organization:\*\*

- *to work with constituents, donors and the beneficiaries so that all future ILO technical cooperation programmes and projects systematically mainstream gender throughout the project cycle. Specifically, this implies:*
  - ✓ *the involvement of both women and men in constituents'/beneficiaries' consultations and analysis*
  - ✓ *the inclusion of data disaggregated by sex and gender in the background analysis and justification of project documents; the formulation of gender-sensitive strategies and objectives and gender-specific indicators, outputs and activities consistent with these*
  - ✓ *striving for gender balance in the recruitment of project personnel and experts and in representation in institutional structures set up under projects*
  - ✓ *in the terms of reference for evaluations, requiring the inclusion of impact assessment on gender equality and gender expertise in the evaluation team*
- *to work with donors so that all future ILO technical cooperation partnership agreements make specific provisions to guarantee and support gender mainstreaming in all the programmes included in the agreement*
- *to increase, through technical cooperation, the capacity of ILO constituents and implementing partners to promote gender equality in the world of work.*

Quality of ILO technical cooperation proposals is assessed by using the following appraisal questions and corresponding quality criteria:\*\*\*

- Does the background analysis contain a gender analysis?
  - ✓ The proposal makes clear reference to existing gender roles, division of labour, opportunities and constraints for women and men to access and control resources, and men's and women's different practical and strategic needs
  - ✓ The data are sex-disaggregated to substantiate the background analysis
- Is gender equality mainstreamed in the logical framework of the project?
  - ✓ Gender equality is reflected at the project outcome level
  - ✓ Gender equality is reflected in the outputs/activities
  - ✓ There are provisions for gender-specific action (through expertise and funding)
  - ✓ The indicators are gender-sensitive and the targets are disaggregated by sex.

\* ILO: *ILO Decent Work Country Programmes: A guidebook*, Version 2 (Geneva, 2008).

\*\* Excerpt from *Minutes of the 292<sup>th</sup> Session of ILO Governing Body*, GB292/PV. The decision was based on the *Thematic evaluation report: Gender issues in technical cooperation*, GB.292/TC/1 by the Bureau of Gender Equality, ILO, Geneva, 2005.

\*\*\* ILO: Appraisal checklist for TC project proposal, in *Technical cooperation manual* (Geneva, 2008).

### Checklist 2.3.1 Is gender mainstreamed in your DWCP?

If most of your answers fall in the ‘yes’ column, it means you are doing well and are on the right track. If more than half of your answers are ‘no’ or ‘not sure’, it means more attention and work are needed to integrate GEMS in the DWCP at the design, implementation or review stages.

#### *In Decent Work Country Programme development, do you do the following?*

| <b>Gender analysis</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 1. Identify the key gender dimensions in the DWCP problem analyses.  |            |           |                 |
| 2. Use data broken down by sex, age and other relevant variables such as geographical origin, ethnicity and income levels.   |            |           |                 |
| 3. Arrange to have in-depth research conducted, if there are serious gender and decent work deficits.  |            |           |                 |
| 4. Seek the views of gender experts and gender equality promoters in the public and private sectors.   |            |           |                 |
| 5. Apply and integrate gender analyses in the design, monitoring and evaluation of the DWCP outcomes.  |            |           |                 |
| 6. Review whether DWCP policies and programmes have different effects on women and men.  |            |           |                 |
| <b>Gender planning</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 7. Decide and agree among ILO partners on GEMS action in the DWCP priorities, outcomes and outputs in line with the 4 key gender equality labour standards: <ul style="list-style-type: none"> <li>• elimination of discrimination in employment and occupation</li> <li>• promotion of equal pay between men and women</li> <li>• maternity protection for all working women</li> <li>• equality for workers with family responsibilities.</li> </ul> |            |           |                 |
| 8. Seek and obtain a firm commitment to gender equality from decision makers at the highest levels in the country and in organizations.  |            |           |                 |
| 9. Seek and obtain a firm commitment to gender equality from key actors at the operational and activity levels.  |            |           |                 |
| 10. Include the views and priorities of male and female interest groups in the DWCP at all stages of the programming cycle   |            |           |                 |
| 11. Address the needs and concerns of male and female interest groups as beneficiaries of DWCP action at macro, meso and micro levels.   |            |           |                 |
| 12. Set specific aims, measures, indicators and targets to ensure that the DWCP will benefit both men and women equally and contribute to closing gender gaps.   |            |           |                 |

| <b>Institutional capacity building</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 13. Identify and build gender equality promotion capacity among ILO constituents and other DWCP change agents.   |            |           |                 |
| 14. Increase balanced participation of women and men in ILO-supported decision making mechanisms and processes in industrial relations and in projects.  |            |           |                 |
| 15. Seek to establish a gender balance at all levels among the staff and partners involved in DWCP promotion and implementation.   |            |           |                 |
| 16. Build capacities among constituents and partners, ILO staff and ultimate beneficiaries through advocacy, awareness raising, training and gender audits.  |            |           |                 |
| 17. Promote decent work-family balance for DWCP staff and counterparts.  |            |           |                 |
| <b>Gender budgeting</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 18. At the budget planning stage, consider the expected gender impact of the DWCP by taking into account the needs of and the potential benefits for women and men.  |            |           |                 |
| 19. If gender inequalities exist, allocate an adequate budget for gender-specific activities and gender expertise.   |            |           |                 |
| 20. At the budget review stage, analyze to what extent men and women benefit from the resources allocated to the DWCP by ILO and institutional partners: to what extent the resource allocations meet the needs and priorities of the men and women. |            |           |                 |
| 21. Reallocate budget revenues and expenditures if the gender impact is found to be inequitable.   |            |           |                 |



## Tool 3. How to review GEMS in your organization

---

### 3.1 About this tool

This tool provides two checklists to assess where an organization stands in implementing gender mainstreaming strategies (GEMS). 'Organization' here means all types and levels of an organization, including a ministry, employers' or workers' organization or non-governmental agency, department, unit, programme or project.

The checklists help you to review the capacity of your own or another's organization in mainstreaming gender equality concerns in its organizational structure and find out how effective it is or could become in conducting gender analysis and planning, and carrying out gender-specific action. They also help you to check whether an organization actively engages men and women in the work of the organization. The checklist questions and a few tips provide ideas for improving the GEMS capacity in organizations.



**Aims:** To identify capacities for gender equality promotion within organizations and find out what areas need attention and improvement



**Users:** ILO partner organizations, managers, technical specialists, advisers and experts, programme officers, project managers and staff

### 3.2 Rationale

#### Box 3.2.1

#### Why is it important to review GEMS in organizations?

Gender inequalities and discrimination are not exceptional or stand-alone occurrences but are a systematic phenomenon, rooted in the gender norms and values in societies and, therefore, deeply embedded in the way in which organizations and workplaces operate.

Organizations dealing with labour and social protection – ministries of labour, social welfare and social security, employers' and workers' organizations – are usually male-dominated especially at the decision making and senior levels. As a result women's concerns and priorities are often invisible, do not appear on policy agendas and do not get the necessary

programme and budget attention. This institutionalization of discrimination in organizations reflects and reproduces discriminatory practices and outcomes, usually, if not always, for women.<sup>19</sup>


For this reason it is vital to find out what are the gender perceptions of staff at all levels in organizations and whether there are any gender biases in institutional cultures, agendas, mechanisms and practices that need to be addressed before an organization as a whole and individual staff have the capacity to effectively promote equality between women and men.

<sup>19</sup> ILO, *Time for equality at work* (Geneva, 2003); and ILO: *Equality at work: Tackling the challenges* (Geneva, 2007).

### 3.3 Checklists

#### Checklist 3.3.1 What is the GEMS capacity of your organization?

If most of your answers fall in the 'yes' column, it means the organization, programme or project is on the right track in implementing GEMS. If more than half of your answers are 'no', more attention and work are needed to step up GEMS implementation.

| Institutional structure and capacity on GEMS <sup>20</sup>   | Yes | No | Not sure |
|--|-----|----|----------|
| 1. Does the organization have a gender policy, action plan and budget?   |     |    |          |
| 2. Does the leadership show commitment to gender equality promotion?   |     |    |          |
| 3. Do operational staff show commitment to gender equality promotion?  |     |    |          |
| 4. If there is a clear policy and political commitment to promote gender equality, is the commitment clearly reflected in actual implementation?   |     |    |          |
| 5. Does the organization have specific programmes or projects with aim to promote gender equality with adequate budget allocations?  |     |    |          |
| 6. Is there a balanced representation of women and men at all levels of personnel? Are men and women treated equally?  |     |    |          |
| 7. Does the organization routinely conduct gender analysis?  |     |    |          |
| 8. Does the organization consult/cooperate with women's organizations?   |     |    |          |
| 9. Does the organization have a gender unit, gender focal point system? Are there specific gender advocates and experts within the organization – and, if yes, who are they?   |     |    |          |
| 10. Does your organization have clear procedures to integrate gender concerns into programming, budget and staff accountability?   |     |    |          |
| 11. Have staff in the organization been provided with gender training?   |     |    |          |
| 12. Does the organization/unit/project routinely ensure that both men and women are represented in staff meetings and training activities?<br> For example, seeking a representation of 40-60 per cent of either sex for equal voice in decision making, or setting a target of two-thirds women if women faced constraints in attending training earlier. For more information, see Tool 9: GEMS in meetings and training. |     |    |          |

<sup>20</sup> This tool is further developed from "Checklist 6: How does your organization deal with gender equality promotion", in N. Haspels and B. Suriyasarn: *Promotion of gender equality in action against child labour and trafficking* (Bangkok, ILO, 2003), pp. 68-69; and European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Section 1, Chapter 6, Tool 6.4 Stakeholder analysis, Spider diagram of organizational capacity, p. 81.

### Checklist 3.3.2 How much do you use GEMS in your organization?

If most of your answers fall in the 'always' column, it means you are doing well in implementing GEMS. If more than half of your answers are 'sometimes', more consistent action is needed in the organization. If more than half of your answers are 'no', more attention and work are needed to step up the implementation of GEMS in the organization.

*In implementing GEMS, do you and your organization do the following?*

| <b>Gender analysis</b>  | <b>Always</b> | <b>Some-times</b> | <b>Never</b> |
|---|---------------|-------------------|--------------|
| 1. Ensure that background data are disaggregated by age and sex, and other important variables such as class or caste and ethnic origin or nationality.   |               |                   |              |
| 2. Include male and female gender advocates or agencies with gender expertise and key women's agencies in policy making, programmes, action plans, research and advocacy initiatives.   |               |                   |              |
| 3. Ensure that the views of men and women, girls and boys potentially affected by the programme/project are sought before, during and after the research.   |               |                   |              |
| 4. Include in the analysis the division of labour among women and men and factors affecting these work patterns, such as political conflict, migration, or the HIV/Aids pandemic.   |               |                   |              |
| 5. Identify the extent of gender inequalities among the target group in access and control over resources – both traditional and new resources, such as money, education, knowledge, skills, new technology, time, information, access to loans and credit. |               |                   |              |
| 6. Identify the factors which influence decision making on the use and distribution of resources in the family, workplace and community of the target group (such as age, sex, social or political position, networks and patronage).                       |               |                   |              |
| 7. Identify any successes or constraints experienced by the programme/project or related projects geared at promoting gender equality in the past.  |               |                   |              |
| 8. Assess gender analysis capacity and identify the training needs on how to do gender analysis among people working in the organization, programme or project.   |               |                   |              |
| <b>Gender-specific action</b>   | <b>Always</b> | <b>Some-times</b> | <b>Never</b> |
| 9. Address the concerns and priorities of both women and men in the work of the organization.   |               |                   |              |
| 10. Design a gender-specific intervention when a certain group is in a particularly disadvantageous position, e.g., positive action, targeting women/girls only or men/boys only.   |               |                   |              |
| 11. Target invisible labour sectors (often dominated by women and girls) in low-quality and low-pay jobs.   |               |                   |              |
| 12. Make specific efforts to involve men and boys in the promotion of gender equality in the organization's work.   |               |                   |              |

|  |               |                   |              |
|--|---------------|-------------------|--------------|
| 13. Develop gender-specific outputs to ensure the programme's benefits among girls and boys, women and men.  |               |                   |              |
| 14. Develop indicators for measuring progress made toward promotion of gender equality among the organization's target groups or clients and/or within the organization.   |               |                   |              |
| 15. When necessary, assist key actors on mainstreaming gender concerns into new and ongoing work of the organization with focus on gender capacity building.   |               |                   |              |
| <b>Representation and participation</b>  | <b>Always</b> | <b>Some-times</b> | <b>Never</b> |
| 16. Ensure media awareness of the gender dimensions of problems and successful strategies.   |               |                   |              |
| 17. Involve both male and female staff at all levels in the design, execution and quality control of the programmes and projects in your organization.   |               |                   |              |
| 18. Give both women and men of all relevant age groups, different income levels and ethnicities the opportunity to voice their views, identify their situation and prioritize their own needs.   |               |                   |              |
| 19. Actively encourage, recruit and mobilize male and female local leaders, and women and men of all relevant age groups to participate in the programmes and become change agents in their workplaces and communities.  |               |                   |              |
| 20. Use gender- and culture-sensitive approaches to reach under-represented groups, e.g., use women interviewers when interviewing women, have female- or male-only meetings when necessary, and involve facilitators who come from and are familiar with the culture of the target group. |               |                   |              |
| <b>Gender budgeting and auditing</b>   | <b>Always</b> | <b>Some-times</b> | <b>Never</b> |
| 21. Ensure that a gender perspective is included at all stages of the budget cycle (from analysis and appraisal to implementation, monitoring and evaluation).   |               |                   |              |
| 22. At the budget planning stage, allocate human and financial resources to include gender expertise.  |               |                   |              |
| 23. Take into account the needs of and the potential benefits for women and men, girls and boys.   |               |                   |              |
| 24. If gender inequalities exist, allocate an adequate amount of budget for gender-specific activities.  |               |                   |              |
| 25. At the budget review stage, analyze to what extent men and women, boys and girls benefit from the resources allocated: to what extent the resource allocations meet the needs and priorities of the beneficiaries of both sexes.   |               |                   |              |
| 26. If gender impact is found to be inequitable (e.g. more men/boys stand to benefit than women/girls, or vice versa), reallocate resources to ensure more equitable gender impact.  |               |                   |              |

***Seek outside gender expertise if you do not have it in your organization***

Following the 1995 Beijing Declaration adopted at the Fourth World Conference on Women in Beijing, governments have strengthened women's ministries and established gender units and gender focal point systems. Gender knowledge and expertise are also available among employers' organizations, such as women entrepreneurship associations or women in business networks, in gender equality or women workers' units of trade unions, in universities and in civil society organizations:

- Gender-specific expertise is usually needed to help an organization with its GEMS review or to design a gender policy or action plan.
- Gender experts are important change agents, helping organizations to avoid common pitfalls and become more effective in promoting gender equality within their work

***Do a participatory gender audit within your organization***

A participatory gender audit promotes organizational learning on how to mainstream gender effectively within the work of an organization through a process of team building, analysis, reflection and knowledge sharing. A gender audit:

- Examines an organization's objectives, programme and budget as well as its organizational culture from a gender perspective and establishes a baseline
- Identifies strengths, critical gaps and challenges for gender equality promotion, recommends ways of addressing these and suggests possible improvements and innovations
- Helps to build organizational ownership and commitment to gender equality initiatives.<sup>21</sup>

---

<sup>21</sup> ILO: *A manual for gender audit facilitators: The ILO participatory gender audit methodology* (Geneva, 2007).

## Tool 4. GEMS in research

### 4.1 About this tool<sup>22</sup>

This tool explains why it is important to include gender in the research design and analysis, and provides a checklist and tips on how to ensure that a gender dimension is well integrated in terms of research content and processes.

The checklist enables you to quickly assess to what extent the Terms of Reference (TOR) and research instruments such as questionnaires include the relevant guidance for carrying out a gender analysis and identify possible inequalities by sex, age, income, ethnicity or migrant status. The tips provide guidance on when to have a clear gender focus in the research design and what are the early warning signs of gender inequalities.



#### Aims:

- To make sure research includes a gender dimension and captures possible existing gender inequalities in the research content and processes
- To facilitate gender-specific research and to conduct effective gender analysis, if gender inequalities exist



**Users:** Staff members of the ILO and its partner organizations, especially researchers and research consultants

### 4.2 Rationale

#### Box 4.2.1

#### Why is it important to include gender in research design?

A good research design has an integrated gender component: This does not mean that all research projects must have an in-depth gender focus. It means that gender should be an important variable in all research about decent work. When gender inequalities are known to be pronounced in the research areas, the design and analysis should have a gender-specific focus.

**When designing any research**, it is important to pay attention to both the research **content** and **processes**. The following questions should be asked and answered:

- *Will the research take into account gender equality concerns throughout its design and analysis?*

- *Is the research methodology suitable to reveal possible inequalities between men and women, boys and girls?*
- *Are available data broken down by sex?*
- *What gender-specific recommendations can be drawn from the analysis?*

**Gender analysis** is a fundamental tool and an essential first step of gender mainstreaming. It helps to identify the different roles, needs and constraints of women and men in the world of work, as well as the opportunities and challenges in the larger environment. It is essential for developing and implementing measures to promote equality in opportunity and treatment between men and women.






Source: Adapted from Bureau for Gender Equality, ILO: *Gender mainstreaming: A management tool for promoting gender equality in technical cooperation projects within the ILO/Netherlands Partnership Programme 2004-2006, Checklists and recommendations*, Checklist 5: Conducting gender sensitive research.




<sup>22</sup> This tool is based on Checklist 4: Is gender included in your research design? in N. Haspels and B. Suriyasarn: *Promotion of gender equality in action against child labour and trafficking* (Bangkok, ILO, 2003), pp. 62-65.

## 4.3 Checklist and tips


### Checklist 4.3.1 Is gender included in your research?

If most of the answers to the following questions are 'yes', it means the research takes into account gender equality concerns in its design and analysis. If more than half of the answers are 'no' or 'not sure', more work is needed to integrate a gender dimension into the research design and analysis.

| Designing Terms of Reference (TOR) for research   | Yes | No | Not sure |
|---|-----|----|----------|
| <p>1. Is a clear gender dimension included in the research background?</p> <p> For example, specify available information such as statistics by sex, preliminary data on gender roles and relations, and existing inequalities with specific situations, constraints and opportunities of men and women, boys and girls, possible differences in the impact of policies, programmes and the work of institutions on men and women. If this information is not available, ensure that the TOR include collection of such data.</p>                                  |     |    |          |
| <p>2. Are there marked signs of gender inequalities to warrant a clear gender focus in the research design?</p> <p> See Tip: When to have a clear gender focus in the research design? below.</p>  |     |    |          |
| <p>3. Are the steps to conduct gender analysis in the research clearly stated?</p> <p> See 'Conducting gender analysis in the research' section below.</p>   |     |    |          |
| <p>4. Is guidance on how to conduct reliable gender-responsive research provided in the TOR? In other words, what needs to be done to ensure that the research will identify needs, perspectives and priorities of men and women.</p> <p> For example, if girls and women cannot speak freely in mixed groups, arrange for female researchers when carrying out women-only interviews or group discussions. Similarly, arrange for male interviewers to work with men, such as boys in prostitution, men and domestic violence or sexual harassment at work.</p> |     |    |          |
| Selecting the research team   | Yes | No | Not sure |
| 5. Do all members of the research team have adequate understanding of gender issues and skills to conduct gender-responsive research?   |     |    |          |
| 6. If the research is carried out by a team of researchers, are both women and men represented in the team?   |     |    |          |
| 7. Are women and men in the research team equally involved in the research (e.g., in the design, field research, data analysis and presentation)?   |     |    |          |
| <p>8. Are gender experts involved in the research design process?</p> <p> This is obligatory if serious gender inequalities are known to exist.</p>  |     |    |          |

| Conducting gender analysis in the research  | Yes | No | Not sure |
|---|-----|----|----------|
| <p><b>Data collection (both quantitative and qualitative research):</b></p> <p>9. Is there a balanced distribution of male and female respondents in the research sample?</p>   |     |    |          |
| <p>10. Are the research data broken down by sex and age (and other key variables such as education, occupation, income, ethnicity, religion)?</p>   |     |    |          |
| <p>11. Does the team have the ability to cross tabulate data to make them meaningful and to identify differences among the research population, (e.g. by sex, age, income and migrant status)?</p>  |     |    |          |
| <p><b>Analysis of the division of labour:</b></p> <p>12. Is there prevalent sex segregation (division between male- and female-dominated jobs) in the labour market?</p> <p> If so, identify the types of work, occupations or sectors in which men and women are typically found.</p>   |     |    |          |
| <p>13. Do men and women workers have a different profile in the labour market, in other words, have different employment or working conditions been identified for the women and men covered in the research?</p> <p> For example, identify their roles and activities by paying attention to key criteria such as the following:</p> <ul style="list-style-type: none"> <li>– working hours (per day or week) and location of work</li> <li>– employment and pay</li> <li>– work hazards</li> <li>– time and location for recreation and rest</li> <li>– age of entry to employment</li> <li>– time spent on paid work and unpaid family responsibilities.</li> </ul>                   |     |    |          |
| <p><b>Analysis of access to and control of resources and benefits and decision making:</b></p> <p>14. Have the research questions and methodological tools been developed to analyze to what extent men and women, boys and girls, may have different access to and control over available resources and benefits?</p> <p> For example, identify who uses, controls and makes decisions about:</p> <ul style="list-style-type: none"> <li>– <i>resources</i>: how to spend time and money, how to use land and work tools, or who goes to school and who works, who goes to meetings</li> <li>– <i>benefits</i>: how to share food and earnings, when and how to use savings.</li> </ul> |     |    |          |
| <p>15. Are there any differences between roles of men and women in decision making in the family, in the workplace and in the community?</p>  |     |    |          |



|  |  |  |  |
|--|--|--|--|
| <b>Analysis of gender-specific needs, constraints and opportunities:</b>   |  |  |  |
| 16. Has the research identified the practical needs – needs linked to the survival (food, water, shelter, job, healthcare, etc.) and living and working conditions of the men and women, boys and girls involved?  |  |  |  |
| 17. Has the research identified the strategic needs – needs for equality and empowerment of both women and men, girls and boys (e.g. sharing of family responsibilities and decision making, equal access to education, training and jobs) to promote the equal and meaningful participation of both sexes in their family, workplace and community?   |  |  |  |
| 18. Has the research identified other factors that influence gender relations in the family, workplace and communities, as well as in the larger environment (e.g. the fertility rate and other demographic variables, the poverty rate, economic opportunities and performance, labour supply and demand, migration patterns, climate and other environmental variables, cultural values, political situation)? |  |  |  |
| <b>Analysis of gender impact of policies, programmes and institutional responses:</b>  |  |  |  |
| 19. Have the possible different effects of economic, employment, labour and social policies, programmes and institutional responses on men and women, girls and boys been identified?  |  |  |  |
|  For example, do policies and programmes affect men and women in the same way? Do men and women benefit equally from certain policies and programmes? Are institutions capable of reaching out to both men and women?   |  |  |  |

**Tip 4.3.1** **When to have a clear gender focus in the research design?**

If earlier research reveals marked signs of gender inequalities, there should be a clear gender focus in the research design. In this case, it is important that the TOR require gender expertise in the team and provide clear guidelines on how to conduct gender-responsive research.

It is helpful to check for **early warning signs** of gender equalities in the research field (see Tip 4.3.3). If two or more of early warning signs are found, then the research needs a clear gender focus and a more detailed gender analysis.

**Tip 4.3.2** **What is gender-responsive research?**

A gender-responsive research must:

- capture relevant gender issues
- be conducted by researchers with the knowledge and skills to conduct gender-responsive research
- have a balanced distribution of female and male respondents in the research sample (unless the research aims to study only one sex)
- disaggregate the research data by sex (and other important variables) at all stages, from data collection to analysis, data presentation and dissemination.

**Tip 4.3.3****What are Early Warning Signs of gender inequalities?**

- There is clear sex segregation in jobs, in economic sectors and/or in social activities in the community/workplace (often as a result of customs or traditions that strictly divide the gender roles, e.g. there are things that men or women can and cannot do).
- The work, views and perspectives of either sex are invisible and not known.
- Power relations between men and women are unbalanced.
- Access to healthcare, other social security, and/or employment services such as job training, or micro-finance, is sharply unequal between women and men.
- Unemployment is disproportionately high among either (young) men or women.
- Sex work is prevalent in the community.
- There are many poor families headed by a single parent (often a mother) or a child.
- There is high incidence of teenage pregnancy.
- School enrolment and completion rates for boys and girls are different by more than five percentage points (usually lower for girls, but increasingly boys do less well in education).
- Family responsibilities are unequally divided (with usually women shouldering more household responsibilities and men making major decisions in the family and in public life).
- There are few women in formal or informal decision making structures and processes (e.g., council or committee in the village or higher level).

## Tool 5. GEMS in project design and implementation

---

### 5.1 About this tool<sup>23</sup>

This tool explains why it is important to integrate gender mainstreaming strategies (GEMS) in project design and implementation. It provides a checklist with tips to integrate GEMS at all stages of the programming cycle: problem analysis, strategy development, identification of the target groups, institutional framework, development of objectives and outcomes, outputs, activities, indicators, monitoring and evaluation, and inputs.



**Aims:** To make sure that gender concerns are addressed from the start of a programme or project and during implementation



**Users:** Programme or project managers, technical specialists, programme officers and consultants from ILO and its partner organizations

### 5.2 Rationale

#### Box. 5.2.1 Why is it important to use GEMS in project design and implementation?

Work is carried out by people – men and women – who may have different needs and priorities. Gender inequalities are prevalent and an important dimension of economic and social development problems in most countries.

Therefore, all programmes and projects that aim to enhance decent work for both sexes need to have a gender dimension and respond to the needs and priorities of both men and women.

In order to ensure successful project implementation and maximum positive effects and impact, gender equality concerns must be integrated in the project design and addressed at the earliest stages of projects and throughout the programming cycle.

Failure to do so can result in ineffective implementation, reduced impact or even widening gender gaps.







---



<sup>23</sup> Sources: ILO: *Results-based management in the ILO: A guidebook*, Version 1 (Geneva, 2008); European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Section 1, Chapter 6, Tool 6.5 Ensuring gender equality in problem analysis, 2004, pp. 83-84, Tool 6.9 Gender equality screening checklist to be used at project identification stage (GESCI), p. 93, and Tool 6.7 The Gender mainstreamed logframe, pp. 89-90 respectively; and N. Haspels and B. Suriyasarn: *Promotion of gender equality in action against child labour and trafficking* (Bangkok, ILO, 2003), Checklist 3: Is gender included in your action programme design?, pp. 57-61.




## 5.3 Checklist


### Checklist 5.3.1 Is GEMS included in your project design?


If most of the answers to the following questions are 'yes', it means the project integrates GEMS in its project design. If more than half of the answers are 'no' or 'not sure', more attention is needed to make sure that the project will address the needs and concerns of men and women by mainstreaming gender throughout the programming cycle.

| Problem analysis   | Yes | No | Not sure |
|--|-----|----|----------|
| 1. Are the available statistics disaggregated by sex and other relevant variables such as age, ethnicity, income, etc.?  |     |    |          |
| 2. Do the problems identified by the project represent the views and priorities of <i>both</i> men and women (not just of men only or women only)?   |     |    |          |
| 3. Has a gender analysis been conducted?<br> For example, relevant gender equality issues are identified, problem analysis provides information on the problems specific to women and men, profiles of women and men are developed especially on types of work, workload, working conditions, job levels and income.  |     |    |          |
| 4. Have any existing gender inequalities been identified in the community or workplace, area or sector?<br> If yes, are these inequalities being addressed by any relevant policies or other programmes or projects?  |     |    |          |
| 5. Does the problem analysis reflect an understanding of the gender roles in the community or workplace, area or sector?<br> For example, identifying the pattern of labour division between men and women, boys and girls, and who makes decisions and how income is distributed.  |     |    |          |
| 6. Does the problem analysis reflect an understanding of the gender relations in the community or workplace, economic sector or occupation?<br> For example, identifying customs, traditions, cultural or religious beliefs that affect the way in which men and women, boys and girls play a role in the family or workplace and in community life.  |     |    |          |
| 7. Have the practical and strategic needs of male and female beneficiaries been identified?<br> <i>Practical needs</i> relate to inadequacies in living and working conditions and are linked to basic livelihood and survival such as food, water, shelter, income, clothing, and healthcare.<br> <i>Strategic needs</i> refer to needs to overcome the subordinate position of women and girls and to promote gender equality and empowerment of women and men in their family and community, e.g. |     |    |          |

|  |            |           |                 |
|--|------------|-----------|-----------------|
| meaningful participation of both women and men in the project, sharing of family responsibilities and decision making, equal access to education and training.   |            |           |                 |
| For more information, see Tool 4: GEMS in research.  |            |           |                 |
| <b>Strategy development</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 8. Is the outcome of gender analysis used when developing the strategy?  |            |           |                 |
| 9. Is it necessary to do a gender analysis and collect sex-disaggregated baseline data?<br> For example, if the problem analysis is gender blind, is it necessary to do a gender analysis at the start of the project – or to collect sex-disaggregated data for monitoring and evaluating the project's effects and impact on women and men? |            |           |                 |
| 10. Have the views of both men and women who are potential beneficiaries and stakeholders been sought in the consultative process?   |            |           |                 |
| 11. Are there clear strategies and/or institutional mechanisms to ensure that women and men will equally participate and benefit?  |            |           |                 |
| 12. Is awareness raising on gender equality promotion included explicitly as one of the project strategies?  |            |           |                 |
| 13. If gender inequalities exist, are any gender-specific strategies and practical measures built into the project (that will address the practical and strategic needs of women and men and reduce the gaps)?   |            |           |                 |
| For more information, see Tool 1: Key concepts and strategies.   |            |           |                 |
| <b>Target groups*</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 14. Have the key characteristics and possible differences among the target groups been clearly identified by sex, age, type of work, income, ethnic origin, etc.?  |            |           |                 |
| 15. Does the problem or situation analysis clearly identify women and men stakeholders and their respective roles?   |            |           |                 |
| 16. Are the ways in which the project benefits will be distributed to the target groups clearly identified?<br> For example, if any group has been underrepresented in benefiting in the past, identify how the benefits will be made available to them.  |            |           |                 |
| 17. Are there measures to strengthen the capacity of the target groups to promote gender equality and address inequalities?  |            |           |                 |
| 18. In strengthening the capacity of the target groups, is there a consideration to avoid increasing the workload of especially women, girls and boys as unpaid workers?   |            |           |                 |
| *Target groups refer to the people the project intends to benefit, i.e. intended beneficiaries, and staff of participating organizations, who are the direct recipients who are being enabled to better serve their intended beneficiaries as a result of the project.   |            |           |                 |

| Institutional framework   | Yes | No | Not sure |
|---|-----|----|----------|
| 19. Has an assessment been made on the capacity of the project implementing agency to address the needs of men and women and to promote gender equality?<br> Review the organization's mandate, its major areas of intervention, its structure and sex balance among staff, staff's attitudes, and capacity to plan, implement and monitor strategies on gender equality promotion |     |    |          |
| 20. Does the project implementing agency have support from or cooperate with gender experts or organizations with gender expertise, if it needs assistance in this respect?   |     |    |          |
| 21. Are both women and men represented in decision making bodies, such as project advisory, steering or management committees?  |     |    |          |
| To assess organizational capacity to promote gender equality, see Tool 3: How to review GEMS in your organization.  |     |    |          |
| Objectives & Outcomes*  | Yes | No | Not sure |
| 22. Do the objectives reflect priority concerns and respond to the practical and strategic needs of male and female beneficiaries? (see Question 7)   |     |    |          |
| 23. If there are pronounced gender inequalities to be addressed by the project, is this reflected in one or more of the project objectives (and corresponding indicators)?  |     |    |          |
| 24. Does the project have policy or institutional development outcomes and benefits that may have a different impact on men and women?  |     |    |          |
| 25. Do the objectives and outcomes clearly identify the intended beneficiaries and stakeholders by sex (as men and women, boys and girls)?<br> Avoid general terms such as 'informal sector workers', 'youth' or the 'rural poor' as most people automatically think of men rather than of men and women.  |     |    |          |
| 26. In direct action project components, do the immediate objectives specify the ratio or number of female and male intended beneficiaries?   |     |    |          |
| * <i>Objectives</i> are usually formulated at two levels: development and immediate objectives. Development objectives refer to the expected contribution of the project to wider positive economic or social changes. Immediate objectives or <i>outcomes</i> refer to significant changes (policies, knowledge, skills, behaviours, practices, etc.) that are intended to occur as a result of the project.   |     |    |          |
| Outputs*  | Yes | No | Not sure |
| 27. In policy making, are the roles of women and men, their needs and participation levels, as well as their specific constraints, explicitly taken into consideration?<br> For example, if too few women are involved in decision making, design specific positive measures in the project to enhance their participation.  |     |    |          |

|  |            |           |                 |
|--|------------|-----------|-----------------|
| 28. In institutional development components, is development of the institutional capacity towards the promotion of gender equality identified?   |            |           |                 |
| 29. In direct action components, are the numbers or percentages of men and women clearly specified among the intended beneficiaries?   |            |           |                 |
| 30. In research, are the data to be disaggregated by sex and gender relations and inequalities identified with explicit information about the specific situations, constraints and opportunities of both boys and girls, women and men?  |            |           |                 |
| 31. In training/education, are the numbers of boys and girls, and women and men clearly stated, who will be trained, in what areas and at what levels?   |            |           |                 |
| 32. If there is a high chance that women will participate less and/or derive less benefits from the project than men, have quota been set for men's and women's participation under the outputs and activities?  |            |           |                 |
| <i>*Outputs are valuable resources, goods or services produced by the project and delivered to beneficiaries.</i>  |            |           |                 |
| <b>Activities</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 33. Are there means to ensure that men and women can participate equally in the project activities?  |            |           |                 |
| 34. Are communication channels identified that will effectively reach specific target groups, in particular women and girls?   |            |           |                 |
| 35. Due to household chores and family care responsibilities often assigned to women and girls, they tend to have less time to participate in project activities. Is this concern taken into account when organizing activities?<br> For example, consider and select a suitable location, physical arrangements, timing and duration of programme activities, child care facilities if necessary, so that women and girls can participate. |            |           |                 |
| 36. If women and girls, or men and boys, cannot or will not speak freely in mixed groups, are separate events planned for women/girls only and men/boys only with facilitators of the same sex to run the events?  |            |           |                 |
| 37. During project implementation do staff seize opportunities to raise awareness on gender equality promotion and demonstrate that the participation of women alongside men in development is beneficial to everyone?   |            |           |                 |
| For more information, see Tool 9: GEMS in meetings and training.   |            |           |                 |
| <b>Indicators, monitoring and evaluation</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 38. Are the baseline data disaggregated by sex and gender-specific?  |            |           |                 |
| 39. Are the indicators (targets or milestones) disaggregated by sex and gender-specific in order to assess the programme impact on the situation of women and men, girls and boys?   |            |           |                 |
| 40. Does the monitoring and evaluation plan call for all data to be systematically disaggregated by sex to measure the gender effects and impact of the project?   |            |           |                 |

|   |            |           |                 |
|---|------------|-----------|-----------------|
| 41. Are methods and tools provided to project staff to break down data by sex and/or collect gender-specific data (both quantitative and qualitative) to effectively measure and evaluate the nature and extent of the benefits for the male and female beneficiaries?  |            |           |                 |
| 42. In monitoring and evaluation, are possible differences in impact of the project on women, men, boys, and girls analyzed and followed up?  |            |           |                 |
| For more information, see Tool 6: GEMS in indicators, monitoring and evaluation.  |            |           |                 |
| <b>Inputs</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 43. Do all staff and partners have an understanding and commitment to contribute to gender equality in the project?   |            |           |                 |
| 44. Do project managers do the following? <ul style="list-style-type: none"> <li>– provide active leadership on gender equality promotion</li> <li>– take note and address early warning signs of gender inequalities (see Tip 4.3.3)</li> <li>– ensure specific gender guidance and expertise is provided as necessary.</li> </ul>   |            |           |                 |
| 45. Have sufficient human and financial resources been allocated for the gender components of the project?  |            |           |                 |
| 46. Has a gender budget analysis been done to assess and analyze the possible different impact of project expenditures on female and male intended beneficiaries?   |            |           |                 |
| 47. If gender budget analysis revealed inequitable effects on female and male beneficiaries, have remedial measures been taken to redress such inequity?  |            |           |                 |
| 48. Has an assessment been made to what extent gender expertise is required in personnel inputs?<br> If so, gender expertise must be explicitly stated in personnel job descriptions.  |            |           |                 |
| 49. If women and girls cannot be effectively reached by male staff, have steps been taken to recruit female staff required, and vice versa for men and boys?  |            |           |                 |
| 50. Is there a commitment in project policy and practices: <ul style="list-style-type: none"> <li>– to achieve an equal balance among male and female project staff at all levels and provide equal remuneration for men and women for work of equal value?</li> <li>– to promote the use of proper contracts and ensure the observance of fundamental labour standards and maternity protection in personnel, equipment and subcontracting policies and procedures?</li> </ul> |            |           |                 |
| For more information, see Tool 7: Gender budgeting and Tool 9: GEMS in human resource management and development.   |            |           |                 |



## Tool 6. GEMS in indicators, monitoring and evaluation

### 6.1 About this tool<sup>24</sup>

This tool explains what gender-responsive indicators are and why these are important in monitoring and evaluation. Tips are given on how to design quantitative and qualitative gender-responsive indicators and how to measure qualitative indicators. Three checklists are provided to help you assess to what extent your monitoring and evaluation system, evaluation criteria and evaluation processes are gender-responsive.



**Aims:** To facilitate the integration of gender mainstreaming strategies (GEMS) into monitoring and evaluation content and processes



**Users:** Managers, technical specialists and experts, programme and project officers of the ILO and its partner organizations and monitoring and evaluation consultants

### 6.2 Concepts and rationale

#### Box 6.2.1 What are gender-responsive indicators?

An **indicator** is a yardstick of change – a tool to measure achievement against a set target within a given time frame. Objectives define what we want to achieve. Indicators show us the extent of progress made in achieving the objectives.

**Gender-responsive indicators** are used to measure the possible different effects and impact\* of development efforts on men and women and gender-related changes. Gender-responsive indicators are used to plan, monitor and evaluate gender equality effects of policies, programmes and projects. They capture gender-specific information to accurately assess achievements on gender equality goals.

In order to monitor and evaluate a project's impact on women, men, gender relations and gender equality, it is important to have a clear starting point. A **gender analysis must be part of the baseline study**, done before or at the start of a programme or project (see Tool 4: GEMS in research).

The gender analysis informs the project on the causes of gender inequalities and helps to develop gender-responsive indicators. In sum, **gender-responsive indicators:**

- require gender analysis and disaggregation of data by sex, age and other relevant variables
- measure similarities and differences in the way men and women, boys and girls benefit from a policy/programme/project – Is it relevant, effective and sustainable for all?
- gauge progress toward achieving gender equality in policy, programme or project goals
- encourage the integration of gender equality issues throughout the programming cycle: during the design and planning, implementation, monitoring and evaluation stages.

\* In this Tool 'effects' (more short-term) and 'impact' (longer-term) are used interchangeably.

<sup>24</sup> Sources: ILO: *Results-based management in the ILO: A guidebook*, Version 1 (Geneva, 2008); ILO: *Evaluation guidance: Considering gender in monitoring and evaluation of projects*, Evaluation Unit (Geneva, 2007); ILO: *Gender briefing note 1: An Introduction to the use of gender indicators at policy, programme and project levels*, (Turin, International Training Centre, 2005); European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Section 1, Chapter 6, Tool 6.6 Gender-sensitive indicators, 2004, pp. 85-87; and N. Haspels: *Engendering indicators in programmes and projects: Training notes* (Bangkok, ILO, 2002), unpublished document.

**Box 6.2.2****Why is it important to have gender-responsive indicators in monitoring and evaluation?**

Conventional monitoring and evaluation systems often do not capture gender differences in access and in impacts. This is usually due to the assumption that monitoring and evaluation methods and processes are 'gender neutral'. But in fact, women are often underrepresented in the sampling and interviews conducted in monitoring and evaluation. For example, when collecting information from households, the 'household head', usually defined as a man, is often the only source of information. In addition, in many societies women tend to have low literacy and less confidence than men to express themselves freely, or they tend to

have less time at their disposal because of their reproductive tasks.

Given these challenges, it is important that project designers and staff are aware of the gender roles and relations among their target groups. In order to effectively monitor and evaluate the project progress and impact on both women and men, they should make sure that indicators are developed based on a proper gender analysis and that the views on the project are obtained from both men and women. Sometimes, this means having female interviewers in the monitoring and evaluation team to interview women – and vice versa for men.

Source: ILO: *Evaluation guidance: Considering gender in monitoring and evaluation of projects* (Geneva, 2007), p. 7.

## 6.3 Tips and checklists

**Tip 6.3.1****How to design quantitative and qualitative gender-responsive indicators**

Generally it is useful to develop indicators for measuring progress in addressing practical and strategic gender needs. Practical gender needs relate to the immediate survival needs of men and women. Strategic gender needs relate to imbalances in the position of men and women and the unequal power relations between them.

It is important to develop both quantitative and qualitative indicators to measure progress in achieving gender equality and empowering the disadvantaged sex. Use of only quantitative indicators can be misleading. For example, increased income may not mean increased control over the benefits from the income, or increases in the number of jobs cannot be a stand-alone indicator as the quality of the jobs is also important.

Indicators should be SMART:

- Specific
- Measurable
- Attainable
- Realistic and Relevant
- Time-bound, Timely and Traceable.

**Quantitative indicators** are measures of quantity and can be expressed in numbers. For example:

- The *number* of women, men, boys, and girls, reached in a project to raise awareness on HIV/Aids in a particular region
- The *percentage* of increased income of women relative to men's after two years of implementation of an enterprise development project, compared with (baseline data on) the level of income of women and men at the start or before project implementation
- The *proportion* of women in formal employment with access to maternity protection.

*continued on page 45*

### Tip 6.3.1... from page 44

**Sources of quantitative indicators** are secondary data, records or information databases or surveys, questionnaires, interviews, or tests.

**Qualitative indicators** are based on descriptive information that captures qualitative (not easily quantifiable) gender differences. This type of indicators usually measures perceptions, observations and judgments of individuals or groups about a given subject. For example:

- *The degree to which* female members of a village's committee feel that they can participate in decision making at the committee's meetings
- *The perceptions* of women and men of the benefits of a particular policy or project and how the implementation of such a policy or programme in their community has affected their lives
- *The extent or scope* of sexual harassment policies in workplaces in preventing violence against women at work.

**Sources of qualitative indicators** are typically observations, document reviews, focus groups, interviews, attitude surveys, participatory appraisals, field research, and public hearings.

When it is not possible to find indicators which directly measure an outcome, proxy indicators may need to be developed. A **proxy indicator** measures outcome in an indirect way. For example, changes in attitudes and behaviours towards gender equality are usually not measured adequately by asking a husband and wife on whether they think progress has been made. In this case, it is better to ask about changes in the division of workload between men and women.

---

Sources: ILO: *Results-based management in the ILO: A guidebook*, Version 1 (Geneva, 2008), pp. 11-14; European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Section 1, Chapter 6, Tool 6.6 Gender-sensitive indicators (2004), pp. 85-87.

### Tip 6.3.2 How to measure qualitative indicators

Qualitative indicators are harder to measure than quantitative indicators as they involve attitudes and opinions which are often subjective. For this reason, qualitative indicators are sometimes transformed into quantitative data with the use of scales by rating individual perceptions on an issue and counting the number of good/medium/bad ratings. For example:



- The participation of women members of a village's committee on an income generating project can be ranked as follows: often/sometimes/never (e.g. the frequency of women expressing their opinions in the last 3 meetings).
- The perceptions of men and women about the usefulness of a particular policy or project in their lives can be ranked on a scale of 1-5, with 1 being the least useful and 5 being the most useful.
- These perceptions can also be measured over time, for example, by comparing the satisfaction levels at different stages in the policy or project cycle (e.g. the average satisfaction level of 2.5 at the end of the first year, and 4.0 at the end of the second year).

---

Source: ILO: *Gender briefing note 1: An introduction to the use of gender indicators at policy, programme and project levels* (Turin, International Training Centre, 2005).

### Checklist 6.3.1 How gender-responsive is your M&E system?

This checklist helps you assess to what extent your monitoring and evaluation (M&E) system is gender-responsive. If most of the answers to the following questions are 'yes', it means that your M&E system is gender-responsive. If more than half of the answers are 'no' or 'not sure', your need to refine your M&E system to better integrate gender concerns.

| Developing a M&E system  | Yes | No | Not sure |
|--|-----|----|----------|
| 1. Are the baseline data disaggregated by sex and indicating relevant gender concerns?   |     |    |          |
| 2. Are the indicators (targets or milestones) disaggregated by sex and gender-specific and do they capture the project impact on the situation of women and men, girls and boys, and gender relations?   |     |    |          |
| 3. Does the M&E plan require all data to be systematically broken down by sex?   |     |    |          |
| 4. Have allocations been made in the budget to ensure gender-specific data collection?   |     |    |          |
| 5. Has the M&E plan been reviewed by a gender expert?  |     |    |          |
| Gathering and managing information during implementation   | Yes | No | Not sure |
| 6. Do the project staff have sufficient capacities to gather gender-specific data and conduct proper gender analysis?<br> If the staff lack gender expertise, what kind of capacity building is needed and who can do this?   |     |    |          |
| 7. Are methods and tools provided to project staff to collect gender-specific data (both quantitative and qualitative)?  |     |    |          |
| 8. Are all data collected disaggregated by sex?  |     |    |          |
| 9. Are these data systematically analyzed in such a way that they capture any possible differences in the project impact on men, women, boys, and girls, and gender relations?   |     |    |          |
| Regular monitoring with the project partners to improve action   | Yes | No | Not sure |
| 10. Are the effects of the project on gender relations regularly analyzed?   |     |    |          |
| 11. Is anyone in the project assigned the responsibility of regularly analyzing the gender impact of the project?  |     |    |          |
| 12. Are observations reviewed with key project partners or stakeholders?<br> Sample questions for discussion:<br><ul style="list-style-type: none"> <li>– How does the project affect men and women?</li> <li>– If there are differences in project impact on men and women, why? (May need to review whether budgets/inputs are gender-responsive.)</li> <li>– What (un-)expected effects does the project have on gender relations?</li> <li>– What are possible long-term effects on gender equality?</li> <li>– What can be learned from this project in terms of gender equality promotion?</li> <li>– How does the project strategy need to be adapted to achieve gender equality goals?</li> </ul> |     |    |          |


| <b>Communicating and reporting results</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 13. Are the project effects on women, men and gender relations addressed in every progress report?     |            |           |                 |
| 14. Does the progress report indicate how the project performed in terms of promoting gender equality? |            |           |                 |
| 15. Has the project established mechanisms to share knowledge on promoting gender equality?            |            |           |                 |

### **Checklist 6.3.2 How gender-responsive are your evaluation criteria?**

Common standard evaluation criteria for measuring performance are: relevance, validity, effectiveness, efficiency, impact and sustainability. These evaluation criteria are the main concern of every evaluation. They are usually specified in the Terms of Reference (TOR) for the evaluation and the evaluators will focus on obtaining sound answers for each of them and reflect this in the evaluation meetings and report.

Each of these criteria has a gender dimension. It is important that an evaluation collects information and reviews the gender dimension – irrespective of whether the project has explicit gender goals or outputs, or is considered to be gender neutral. In the latter case, if pronounced gender inequalities are known to exist, it may be useful to ask the evaluation team to explicitly evaluate the gender effects of the project.


This checklist helps you assess to what extent your evaluation criteria are gender-responsive. If most of the answers to these questions are ‘yes’, it means that your evaluation criteria are gender-responsive. If more than half of the answers are ‘no’ or ‘not sure’, you need to better integrate gender concerns into your evaluation criteria.

| <b>Relevance and strategic fit</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|---|------------|-----------|-----------------|
| 1. Does the project align with the gender equality goals in the concerned country or countries?   |            |           |                 |
| 2. Does the project align with the gender mainstreaming strategy of the project partners, the donors and the ILO and make explicit reference to it?   |            |           |                 |
| 3. Was a gender analysis included during the needs assessment and/or baseline study before or at the start of the project?  |            |           |                 |
| <b>Validity of design</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 4. Does the project document integrate gender mainstreaming strategies in its design?<br> See Tool 5: GEMS in project design and implementation. |            |           |                 |
| 5. Do the project objectives and outcomes adequately address gender concerns?   |            |           |                 |
| 6. Is the project strategy adapted to the identified needs and capacities of female and male beneficiaries and partner agencies or stakeholders?  |            |           |                 |
| 7. Are the indicators for outputs and immediate objectives (outcomes) gender-responsive?  |            |           |                 |

| <b>Effectiveness of implementation</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|---|------------|-----------|-----------------|
| 8. Do results (effects of activities and outputs) affect women and men differently? (If so, why and in which way?)  |            |           |                 |
| 9. Did the project achieve its gender-related objectives? (If so, what kind of progress was made and what were the obstacles?)  |            |           |                 |
| 10. Is there a likely impact (expected or unexpected) on gender relations? (If so, what and how?)   |            |           |                 |
| 11. Are the project outcomes and/or outputs likely to contribute to gender equality? (If so, how?)  |            |           |                 |
| 12. Were the project's implementing partners aware of ILO's and the project's gender-related objectives?  |            |           |                 |
| 13. Have the project's implementing partners been sensitized and trained on gender issues?  |            |           |                 |
| 14. If the project is not achieving its gender equality goals effectively, have alternative strategies been considered to promote gender equality?  |            |           |                 |
| <b>Effectiveness of management arrangements</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 15. Do the management team and staff have adequate gender expertise?  |            |           |                 |
| 16. Did the project make strategic and efficient use of in-house or external gender experts when needed?  |            |           |                 |
| 17. Does the project have a gender-responsive M&E system in place (including the collection of sex-disaggregated data and the monitoring of gender-related results)?  |            |           |                 |
| 18. Has the project effectively communicated its gender-related objectives, results and knowledge among project staff, partners and stakeholders?   |            |           |                 |
| <b>Efficiency of resource use</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 19. Were resources (funds, human resources, time, expertise, etc.) allocated adequately to reach men and women equitably in achieving the general and gender-specific objectives, outputs or activities of the project? |            |           |                 |
| 20. Were resources spent equitably for the benefits of male and female beneficiaries?   |            |           |                 |
| 21. Were the results (effects of outputs and activities) achieved for/by women and men gained with efficient use of the resources (good price-output ratio in terms of quantity and quality)?                           |            |           |                 |
| 22. Were available gender expertise, guidelines and tools adequately used?  |            |           |                 |
| <b>Impact orientation and sustainability</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 23. Are there expected long-term impacts on gender equality among the target groups? (If so, what are they?)  |            |           |                 |
| 24. Are the gender-related outcomes likely to be sustainable?   |            |           |                 |
| 25. Are the existing or newly built capacities of implementing partners and stakeholders to promote gender equality sustainable?  |            |           |                 |

### Checklist 6.3.3 How gender-responsive is your evaluation process?

This checklist helps you assess to what extent your evaluation process is gender-responsive. If most of the answers to these questions are 'yes', it means that your evaluation process will facilitate the analysis of gender impact. If more than half of the answers are 'no' or 'not sure', your need to pay more attention to gender in the evaluation process.

| Writing the evaluation Terms of Reference (TOR)   | Yes | No | Not sure |
|---|-----|----|----------|
| 1. Do the evaluation TOR recognize the gendered nature of economic and social development and the contribution of gender equality to achieving sustainable change?  |     |    |          |
| 2. Are the TOR for the evaluation gender-specific, even if the project document is gender blind?  |     |    |          |
| 3. Are key gender issues (e.g. division of labour, time-use analysis, and control of resources and decision making between men and women) incorporated in the evaluation design?  |     |    |          |
| 4. Do the TOR ask specific questions regarding project performance in terms of benefiting men and women and gender equality promotion?  |     |    |          |
| 5. Are all evaluation questions worded in a gender-specific manner and ask for sex-disaggregated information?<br> Avoid the use of general terms such as the 'rural poor' or 'rural children' but instead use 'poor men and women' or 'poor girls and boys'. |     |    |          |
| 6. Have gender experts been consulted during the drafting of the TOR?   |     |    |          |
| 7. Do the TOR indicate that the evaluators need to meet and find out the views of men and women among beneficiaries, project partners and other key stakeholders?   |     |    |          |
| Selecting the evaluation team   | Yes | No | Not sure |
| 8. Does the evaluation team have an equal balance of women and men?   |     |    |          |
| 9. Does the evaluation team have adequate gender expertise?   |     |    |          |
| 10. Has the evaluation team been given proper briefing on relevant gender issues to be addressed in the evaluation?   |     |    |          |
| Conducting the evaluation   | Yes | No | Not sure |
| 11. Is the evaluation methodology designed in such a way that sex-disaggregated data can be analyzed and is a gender analysis available for review by the evaluators?   |     |    |          |
| 12. Do the evaluators collect information about and from both male and female beneficiaries, project partners and other stakeholders?   |     |    |          |
| 13. In case sex-disaggregated data and a gender analysis are not readily available, will the evaluators do a quick gender scan?   |     |    |          |

| <b>Writing and reviewing the evaluation report</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 14. Does the evaluation report explicitly analyze and discuss the performance of the project in addressing gender concerns, and are there concrete gender-specific findings and conclusions? |            |           |                 |
| 15. Does the report analyze the efficiency and effectiveness of the project's M&E system with regard to addressing gender concerns?  |            |           |                 |
| 16. Does the report include lessons learned and make specific recommendations on how the project can improve its performance in promoting gender equality?                                   |            |           |                 |
| 17. Is the draft report circulated to both male and female partners and stakeholders and/or gender experts for comments?   |            |           |                 |
| <b>Sharing knowledge and follow-up</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 18. Are evaluation findings on gender equality promotion discussed with key project partners and stakeholders?   |            |           |                 |
| 19. Is relevant knowledge generated by evaluation on gender equality promotion made available?   |            |           |                 |
| 20. Are the gender-related evaluation recommendations included in the briefing and follow-up with management?  |            |           |                 |
| 21. Do the management and stakeholders take adequate action on these recommendations?  |            |           |                 |



## Tool 7. Gender budgeting

### 7.1 About this tool

Gender budgeting has been gaining popularity in recent years. Governments and organizations have started to use gender budgeting instruments because it supports and is in line with current results-based and performance-oriented management approaches in development work.<sup>25</sup> Gender budgeting helps to ensure gender equality outcomes in development programmes because it shows where the money goes at the budget analysis, planning, allocation, expenditure and review stages, and leads to greater transparency and accountability.

Gender budgeting is still a relatively new concept. This tool gives an introduction to gender budgeting concepts and provides tools for gender budget analysis.



**Aims:** To find out what gender budgeting is, why it is important and how to do it



**Users:** Government ministry and department officials in charge of budgeting, local government officials, managers and staff members of ILO partner organizations, ILO-commissioned consultants, ILO managers and staff

### 7.2 Concepts and rationale

#### Box 7.2.1 What is gender budgeting?

The term 'gender budgeting' sometimes makes people think that it is about separate budgets for women and men or about dividing a budget 50-50 between them. This is *not* what gender budgeting means.

**Gender budgeting** helps to ensure gender equality in outcomes in development policies and programmes by incorporating a gender perspective into the budgetary process. Gender budgeting seeks to inform and improve development policies and programmes with a view to address possible differences in roles, contributions and needs of women and men, girls and boys, and design adequate budget responses accordingly.

Gender budgeting is also called 'gender-responsive budgeting' or 'gender-sensitive budgeting'.

In sum, gender budgeting:

- is an integral part of gender mainstreaming and good governance
- involves gender budget analysis: identification of the different impacts of revenues and expenditures on men and women, boys and girls, and on gender equality
- may involve relocation of revenues and expenditures and restructuring of the budgetary process to ensure fair and equitable distribution of benefits to both sexes.

Sources: ILO: *Gender briefing note 3: Gender budgeting, mainstreaming gender perspectives into national budgets*, (Turin, International Training Centre, 2005); and Ministry of Women, Family and Community Development & UNDP, *Manual on gender budgeting in Malaysia* (Kuala Lumpur, 2005), pp. 1, 9.

<sup>25</sup> Ministry of Women, Family and Community Development and UNDP: *Manual on gender budgeting in Malaysia* (Kuala Lumpur, 2005); see also J.G. Stotsky: *Gender budgeting*, International Monetary Fund working paper, WP/06/232, 2006, p. 17.

### Box 7.2.2 Why is gender budgeting important?

Most budgets are not specifically targeted at women or men. Budgets at national or local levels typically view all citizens as equal beneficiaries of services and tax payers. However, due to their different roles and status and unequal access to resources and benefits, men and women, boys and girls, usually do not benefit equally from such 'gender neutral' budgets – often women and girls are at a disadvantage.

Gender budgeting brings added value to the budgetary process by providing mechanisms to:

- increase *transparency and accountability* in the overall budget process by

measuring where spending goes and revenue comes from, and who pays and who benefits

- analyze whether programmes actually reach and benefit the most disadvantaged intended beneficiaries who are often girls and women
- track public revenue and expenditure against gender and development commitments and make changes if these goals are not met
- ensure that women and men participate at all levels of the budget formulation process and that their needs and priorities are adequately represented.

---

Sources: European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Chapter 6, Tool 6.12 Gender budgeting (2004), pp. 99-106; and Ministry of Women, Family & Community Development and UNDP: *Manual on gender budgeting in Malaysia* (Kuala Lumpur, 2005), pp. 5, 11.

## 7.3 Gender budget analysis: Approach and tips

Gender budgeting initiatives started in the mid eighties with women's budget analysis. These exercises measure the effectiveness of budgets that specifically target women and girls to address their specific gender needs and redress gender imbalances. Contemporary examples of such gender-specific expenditures are programmes to:

- provide female sanitation in schools or workplaces that are or used to be male-dominated
- increase women's and men's participation in training and jobs in which the other sex predominates
- involve men in reproductive health services and action against violence
- promote gender equality in the public sector such as setting targets to achieve better sex balance at senior levels, promoting equal pay for work of equal value, etc.

However, since the late nineties gender budget analysis does not focus on reviewing gender-specific expenditures but on the analysis of general expenditure or the 'mainstream budget' aimed to deliver to the overall population. Most gender budget initiatives focus on reviewing the spending side of a budget, for example, expenditure analysis of (increases or cuts) in public services in education and training, health, job creation and social security and assistance. Others look at the revenue or tax side, for example, analysis of the gender effects of different types of tax systems. Gender budget and time use analysis also serves to make unpaid care work visible.

Tip 7.3.1 explains what gender budget questions to ask for each of the main project components. Tip 7.3.2 discusses gender budget questions to ask at each stage of the programming cycle. These tools are used to analyze the gender impact of general policy measures or programmes and their expenditure and revenue. Tip 7.3.3 describes how gender budget and time use analyses can show how budget changes for public services affect unpaid care duties of women and men.

**Tip 7.3.1****How to do a gender budget analysis**

A gender budget analysis makes it possible to highlight relevant issues at each level of the logical framework, and to pinpoint the level(s) at which gender bias may occur and where remedial action may be needed. A gender budget analysis may be applied at different points in the programming cycle: during identification and planning, and during evaluation and audit.

| Level in the logical framework                        | Questions to ask  | Example   |
|---|---|---|
| <b>Needs/client analysis</b><br>(target group)        | <ul style="list-style-type: none"> <li>Who is the target group?</li> <li>What are the situations of women and men, girls and boys (and/or different subgroups, e.g. rural/urban, youth/elderly) in the target group?</li> </ul>                         | <ul style="list-style-type: none"> <li>Access to reproductive health services of women, compared to men</li> <li>Primary school enrolment rates of boys and of girls</li> <li>Percentages of male and female employees having access to credits and loans</li> <li>Types of employment and unemployment rates of men and women</li> </ul> |
| <b>Intervention</b><br>(policy, programme or project) | <ul style="list-style-type: none"> <li>Is the intervention gender-responsive?</li> <li>Does the intervention address the gender-specific situations described in the needs analysis?</li> </ul>   | <ul style="list-style-type: none"> <li>National policy to reduce national fertility rates</li> <li>Project to increase school enrolment rates for girls to be on par with those of boys</li> <li>Company programme to provide credits and loans to employees</li> <li>Project to create jobs in migrants-sending provinces</li> </ul>     |
| <b>Inputs</b><br>(money allocated and spent)          | <ul style="list-style-type: none"> <li>Are the resources adequate to achieve gender equality?</li> <li>Who decides and oversees budget allocations: men, women or both?</li> </ul>  | <ul style="list-style-type: none"> <li>Financial and human resources</li> <li>Procedures and mechanisms</li> </ul>  |
| <b>Activities</b><br>(services planned and delivered) | <ul style="list-style-type: none"> <li>Are the activities designed to meet the specific needs of both men and women, or for either group?</li> <li>If designed for both men and women, do both groups have equal access to these activities?</li> </ul> | <ul style="list-style-type: none"> <li>Public health services</li> <li>Schooling</li> <li>Job creation schemes</li> <li>Credit and loan services</li> <li>Income generating activities for migrants-sending provinces</li> </ul>  |

*continued on page 54*

Tip 7.3.1... from page 53

| Level in the logical framework   | Questions to ask   | Example  |
|--|--|--|
| <b>Outputs</b><br>(utilization of services)  | <ul style="list-style-type: none"> <li>To what extent do men and women benefit from the outputs?</li> <li>Do sex-specific outputs reach the intended target group?</li> <li>If designed to reach both men and women, are outputs fairly distributed between both sexes?</li> </ul> | <ul style="list-style-type: none"> <li>Number of male and female patients receiving health services</li> <li>Number of boys and girls enrolled in school</li> <li>Number of male and female employees receiving credits and loans from the company</li> <li>Number of men and women participating in the income generating activities</li> </ul> |
| <b>Impact</b><br>(planned or actual achievements – outcomes in relation to broader objectives) | <ul style="list-style-type: none"> <li>What is the impact of the programme on men and women?</li> <li>How does the achievement of the objective (improved healthcare, increased school enrolment, etc.) contribute toward gender equality?</li> </ul>                              | <ul style="list-style-type: none"> <li>Improved healthcare</li> <li>Increased school enrolment in primary and secondary school</li> <li>Improved access to credits and loans for employees in the company</li> <li>Job creation in migrants-sending provinces</li> </ul>   |

Sources: Adapted from D. Elson: "Towards gender-responsive budgeting," Presentation to Conference hosted by the Belgian Government and organized by UNIFEM/OECD/Nordic Council of Ministers/Commonwealth Secretariat/IDRC, Brussels, 2001, cited in European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Chapter 6, Tool 6.12 Gender budgeting (2004), pp. 100; European Commission, *Gender budgeting: Its usefulness in programme-based approaches to aid*, Briefing Note, EC Gender Helpdesk, 2006, p. 13; and Ministry of Women, Family & Community Development and UNDP, *Manual on gender budgeting in Malaysia* (Kuala Lumpur, 2005), Table 3, p. 15.

**Tip 7.3.2**

**Gender budget questions to ask at each stage of the programming cycle**



Several analytical and methodological tools that are often used by governments and organizations at different stages during the programming cycle are given below. Each of these tools can be used independently, or combined with other tools. Which tools to use depends on the aim of each exercise and the stage in the budget/programming cycle.

| Tool  | Questions to ask   | Data requirements/Methods  |
|---|--|--|
| <p><b>Gender-aware policy appraisal</b></p> <ul style="list-style-type: none"> <li>✓ good to use early in gender budget initiative in a policy or programme</li> <li>✓ a starting point for gender budget analysis</li> </ul>     | <p>Q: In what ways will the policy or programme and its resource allocations affect men and women, and reduce or increase gender inequalities?</p> <p>Q: What are the current gender inequalities in the sector? Are there gender-specific constraints, needs and opportunities?</p> <p>Q: What is the likely impact of current policy/programme on these inequalities, needs, constraints and opportunities?</p> <p>Q: Is it possible to add specific measures to make the policy/programme more effective, efficient, fair and just?</p> | <p><b>Data:</b> quantitative and qualitative data about the policy or programme</p> <p><b>How:</b> analyze explicit and implicit gender implications of national or sectoral policy or programme, and examine the ways in which priorities and choices are likely to reduce or increase gender inequalities</p> <p><b>Methods:</b> 5-step approach:</p> <ul style="list-style-type: none"> <li>• situation analysis of sector</li> <li>• policy/programme analysis within sector</li> <li>• analysis of budget allocations</li> <li>• analysis of service delivery</li> <li>• analysis of outcomes/impact/change in situation</li> </ul> |
| <p><b>Sex-disaggregated beneficiary assessment</b></p> <ul style="list-style-type: none"> <li>✓ makes gender visible</li> <li>✓ more participatory than policy analysis as data are collected about/from men and women</li> </ul> | <p>Q: Who are the beneficiaries of the budget or users of the services?</p> <p>Q: To what extent does the policy or programme match the needs and priorities of the beneficiaries or users of the services?</p>  | <p><b>Data:</b> sex-disaggregated quantitative and qualitative data about/from beneficiaries/users</p> <p><b>How:</b> ask actual or potential (both male and female) beneficiaries or users about their views and experience</p> <p><b>Methods:</b> opinion polls, attitude surveys, focus group discussion, interviews</p>  |

*continued on page 56*

Tip 7.3.2... from page 55

| Tool   | Questions to ask  | Data requirements/Methods   |
|--|---|---|
| <p><b>Sex-disaggregated impact analysis of public expenditure</b></p> <ul style="list-style-type: none"> <li>✓ assesses gender impact of a policy or programme on the intended beneficiaries</li> <li>✓ can be used to estimate gender impact of proposed budget cuts</li> </ul>   | <p>Q: How is the public expenditure of a given programme distributed between male and female beneficiaries?</p>   | <p><b>Data:</b> public expenditure data for a given programme and data from household surveys</p> <p><b>How:</b> estimate and compare distribution of budget between male and female beneficiaries</p> <p><b>Methods:</b></p> <ul style="list-style-type: none"> <li>• identify the unit cost of a specific programme or service</li> <li>• identify its users and disaggregate them by sex, age, income, ethnicity, location, etc.</li> <li>• find out how benefits are distributed and whether remedial action is needed</li> </ul> <p>Example: What is the cost of secondary education per child and to what extent does this expenditure reach boys and girls of secondary school age in different locations and income groups? If the results are unequal by sex, location or income level, a budget shift may be needed to reach the disadvantaged groups</p> |
| <p><b>Gender-aware budget statement</b></p> <ul style="list-style-type: none"> <li>✓ not an analytical tool but an instrument of accountability</li> <li>✓ may be combined with any of the above tools</li> <li>✓ should be done on a regular basis, e.g. annually</li> <li>✓ may be included as an annex to the budget</li> </ul> | <p>Q: What are the expected and actual gender-specific impact of government (or organizational or programmatic) policy, programme or measures?</p> <p>Q: What remedial measures are being taken to address gender inequalities (not addressed by such policy, programme or measures)?</p> | <p><b>Data:</b> sex-disaggregated data on the organization's targets</p> <p><b>How:</b> report on the expected and actual gender impact of the budget</p> <p><b>Methods:</b> reporting in narrative, table or indicator format; easiest in programme/performance budgeting format</p>   |

Sources: Adapted from European Commission: *Toolkit on mainstreaming gender equality in EC development cooperation*, Chapter 6, Tool 6.12 Gender budgeting (2004), pp. 103-4; UNFPA and UNIFEM: *Gender responsive budgeting in practice: Annexes*, "GRB analysis tools: An introduction", PowerPoint presentation, March 2007; and European Commission: *Gender budgeting: Its usefulness in programme-based approaches to aid*, Briefing note, EC Gender Helpdesk (2006).

**Tip 7.3.3****How to make unpaid care work visible with gender budget & time use analysis**

Budget allocations for public services have effects on how people use their time. For example, a cut in public health budgets often means additional care work for women, because in virtually every country women bear more responsibility than men for unpaid, ‘reproductive work’ – household duties, childbearing and rearing, and caring for other family members.

Gender budget and time use analysis are particularly useful for making unpaid labour in the ‘care or reproductive’ economy visible, because it assesses how public policies and budgets affect the roles and responsibilities of both sexes and can become the starting point for developing policies and practical measures to share the burden of unpaid care work more equally between women and men and workers with and without family responsibilities and ensure that such duties do not prevent women from contributing economically and socially in other ways.

Unless governments support male and female workers in combining paid work with family responsibilities, countries cannot make effective use of all their human resources in contributing to economic growth and the well-being of society. Policymakers and programme managers should start accounting for unpaid care work and then designing appropriate policy and practical measures to promote a better work-family balance.

| Tool  | Questions to ask   | Data requirements/Methods  |
|---|--|--|
| <p><b><i>Sex-disaggregated impact analysis of the budget on time use</i></b></p> <ul style="list-style-type: none"> <li>✓ useful in studying gender-specific effects of changes in public spending</li> <li>✓ draws attention to the ways in which the time spent by women and men on unpaid work is (or is not) accounted for in policy analysis</li> <li>✓ can compare value of unpaid care work with budget amounts</li> </ul> | <p>Q: What are the implications of the distribution of resources (in terms of money and time) for men and women?</p> | <p><b>Data:</b> data on budget allocations and sex-disaggregated data on household time use, e.g.</p> <ul style="list-style-type: none"> <li>• electricity and fuel collection</li> <li>• water supply and collection</li> <li>• family care (caring of children, the elderly and ill family members)</li> <li>• public transportation, travelling</li> </ul> <p><b>How:</b> examine the relationship between budget allocations and how male and female household members spend their time</p> <p><b>Methods:</b> household time use surveys, interviews and participant observations</p> |
| <p>Sources: Ibid; and Ministry of Women, Family &amp; Community Development and UNDP, <i>Manual on gender budgeting in Malaysia</i> (Kuala Lumpur, 2005), p. 10.</p>  |  |  |

## Tool 8. GEMS in human resource management and development

### 8.1 About this tool

This tool explains why it is important to use gender mainstreaming strategies (GEMS) in human resource management and development (HRD), what are the main gender concerns in this field, and how these can be adequately addressed in HRD policies, procedures and practices.

The checklist can help you to assess to what extent human resource management and development in your organization, programme or project integrates GEMS, in terms of gender balance in staffing, equal pay and other working conditions, and how to reflect gender equality in job content, recruitment procedures and staff appraisals. The tips list GEMS-HRD good practices, and give examples of gender equality standard clauses in Terms of Reference (TOR) and external collaborator contracts.



#### Aims:

- To assess to what extent gender equality concerns are integrated in human resource management and development (HRD)
- To understand and apply gender-responsive HRD measures which increase the effectiveness of organizations in promoting equality between men and women



**Users:** HRD staff, managers, technical specialists and experts, programme officers of the ILO and its partner organizations, programmes and projects

### 8.2 Rationale and main issues

#### Box 8.2.1

#### Why is it important to use GEMS in HRD?

Workplaces benefit from the diverse talents that men and women bring, and people, or human capital, are the most important asset of organizations for achieving their goals and mandate. However, even organizations with gender equality goals often face HRD challenges which impede effective action on the promotion of equal opportunity and treatment by the organization:

- Many organizations suffer from internal imbalances in their staff composition with a majority of men in higher-level positions and a majority of women in subordinate positions. This compromises organizations' capacity to take into account the views and perspectives of women in their work, because the voice of women is absent

from organizations' decision making mechanisms.

- The responsibility for gender equality promotion is often delegated to a small unit with few staff, usually women, who tend to be overburdened and work in isolation, outside the mainstream of their organizations.

Organizations committed to become effective change agents for gender equality promotion, have started to make changes in their human resource procedures and practices, for example, by ensuring gender parity among the staff at all levels and by increasing gender capacity and accountability among staff for more effective policy and programme development and improved service delivery to male and female clients.



## 8.3 Checklist and tips


### Checklist 8.3.1

#### Is gender included in your organization's policies, procedures and practices?

If most of the answers to the following questions are 'yes', it means the human resource management and development of your organization/programme/project is gender-responsive. If more than half of the answers are 'no' or 'not sure', more attention is needed to integrate gender concerns into HRD.

| <b>Sex balance and equal pay<sup>26</sup></b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 1. Are men and women distributed equally among all levels of personnel at decision making, management, technical, financial, administrative and operational levels: <ul style="list-style-type: none"> <li>– among the core personnel of your unit/programme/project?</li> <li>– among the externally hired personnel, e.g. consultants, researchers, project partners?</li> </ul> |            |           |                 |
| 2. Is there an equal sex balance among full-time and part-time staff?  |            |           |                 |
| 3. Are men and women found in "men's" and "women's" jobs respectively (e.g. men are managers, supervisors, drivers and/or field workers, and women are secretaries, and administrative or accounting assistants)?  |            |           |                 |
| 4. If the sex-balance in your organization is uneven, does your organization have a policy to achieve greater parity?  |            |           |                 |
| 5. Are male and female core staff and externally hired personnel paid the same for equal work and for work of equal value?   |            |           |                 |
| <b>Job descriptions and Terms of Reference (TOR)</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 6. Does the job description or TOR show that the candidate(s) need to incorporate a gender perspective in their job or consultancy?  |            |           |                 |
| 7. Does the job description or TOR for technical staff and consultants show that the candidates need to do gender analysis and come up with recommendations to address any inequalities?   |            |           |                 |
| 8. If specific gender expertise is required for an assignment, is this clearly stated in the job description or TOR for the person or team?  |            |           |                 |
| <b>Recruitment procedures</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 9. Does your organization promote equal opportunities between men and women in recruitment and promotion?  |            |           |                 |
| 10. Is the language in the vacancy announcements, job descriptions and TOR gender-sensitive and free of linguistic biases (e.g. using male pronouns as 'generic' pronouns)?  |            |           |                 |

<sup>26</sup> Adapted from: ILO: Bureau for Gender Equality, *Gender mainstreaming: A management tool for promoting gender equality in technical cooperation projects within the ILO/Netherlands Partnership Programme 2004-2006, Checklists and recommendations*, Checklist 2: Recruiting Gender Sensitive Project Personnel, Geneva, no date.

|  |            |           |                 |
|--|------------|-----------|-----------------|
| 11. Does the call for applications encourage underrepresented groups to apply (e.g. women, men, the disabled, members of ethnic groups)?   |            |           |                 |
| 12. Are the vacancy announcements widely circulated to areas and through channels so that both women and men are likely to read them?  |            |           |                 |
| 13. If specific gender expertise is required for a post, is this clearly stated in both the vacancy announcement and the job description?  |            |           |                 |
| 14. Does the written test and selection interview include a measurement of the gender awareness, expertise or competency of the candidates for all relevant posts?<br> 'Relevant posts' are gender-specific posts but also include more general posts such as management and technical fields or operations where gender inequalities are known to exist and should be addressed. |            |           |                 |
| 15. Is an official with gender expertise represented in the selection panel?   |            |           |                 |
| 16. Do you avoid gender bias in setting payment rates (e.g. paying women less than men)?   |            |           |                 |
| 17. Will the selected candidate receive a proper contract that is in line with fundamental labour standards and provides for maternity protection?   |            |           |                 |
| <b>Staff appraisals</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 18. Is the staff made accountable for supporting gender equality in their work? (If yes, how?)   |            |           |                 |
| 19. Is the performance on gender mainstreaming and gender equality promotion included in all performance appraisals of managers, technical specialists and programme/project officers?   |            |           |                 |

### Tip 8.3.1

### What are successful GEMS-HRD procedures and practices?

- Strive towards sex balance at all levels in workplaces: Set targets for gender parity to increase women's representation in senior positions, and for both sexes at all levels and in all fields of work
- Provide for specific gender capacity building for all staff in their field of responsibility. For example, HRD officers need to know why GEMS is important and how to integrate it in HRD procedures and practices
- Assign responsibility for overall GEMS implementation with clear distribution of duties and responsibilities at all levels (managers, technical specialists and experts, programming officers, etc.)
- Address gender equality in recruitment:
  - Include overall GEMS responsibilities in job descriptions, vacancy announcements, TORs for consultants and subcontracts
  - Require gender expertise for posts that are critical for effective equality promotion
  - Assign gender experts when gender inequalities are to be addressed
- Increase accountability for GEMS by assessing performance on equality promotion in staff appraisals.

*continued on page 61*

**Tip 8.3.1... from page 60**

**Merit and equality promotion: “Do’s & Don’ts” in positive action**

The provision of equal opportunities to men and women in workplaces makes good ‘social justice and business sense’. People in workplaces with an equitable sex balance at all levels are usually more productive and happier. Diversity and the use of the combined talent of men and women are generally good for productivity and an equitable sex balance in workplaces can go a long way in preventing workplace abuses such as sexual harassment.

- Merit is the primary criterion for recruitment and promotion in societies where women and men have received equal chances in education and training. Given equal merits, if there are pronounced inequalities, positive action measures may need to be applied to redress the effects of (past) discrimination. This means giving priority to applicants from the under-represented group (sex, ethnicity, (dis)ability or other relevant grounds).
- Positive action measures are often resented by the majority group. This can lead to harassment or a hostile working environment for people who have been selected on the basis of both merit and positive action. It is therefore important to clearly point out that successful applicants who have been given preference (due to under-representation of their own group) have passed the ‘equal merit’ test first.
- In many societies and organizations, women are seriously underrepresented at the higher decision making levels in public office, in government and in the private sector. In such cases, it is necessary to:
  - set targets or quota for women’s representation at the higher echelons, and/or for men and women at all levels
  - lower the ‘entry bar’ if women cannot compete on an equal footing, because of lack of education, training or chances to take on positions in public life. This measure needs to be accompanied by capacity building training and coaching measures to enable such women to carry out their new responsibilities effectively.

**Tip 8.3.2**

**Examples: GEMS clauses in TORs and external collaborator contracts**

• **For research and design of project documents**

*The consultant(s) will be responsible for ensuring that gender equality concerns are addressed into the work through:*

- *the collection and reporting on sex-disaggregated data and gender analysis*
- *consultations with relevant gender experts and organizations*
- *explicit discussions on the gender dimensions of the technical work*
- *incorporation of gender analysis and planning into the strategies, objectives or outcomes, indicators, activities and budgets of the research or project*
- *development of recommendations and practical suggestions for gender equality promotion.*

For further information, see Tool 4: GEMS in research and Tool 6: GEMS in indicators, monitoring and evaluation.

• **For project implementation and workshops**

*The consultant will ensure that gender concerns are included in workshops’ aims, outputs and activities, including:*

- *commissioning of research*
- *carrying out consultations, meetings, training and advocacy activities*
- *issuing of invitations to participants and resource persons*
- *preparing workshop agendas*
- *giving presentations or preparing guidelines for presentations by invited speakers, and in monitoring, evaluation, and reporting assignments.*

For further information, see Tool 9: GEMS in meetings and training.

## Tool 9. GEMS in meetings and training

---

### 9.1 About this tool

This tool explains why it is important to promote gender equality and ensure equal representation of women and men in meetings and training. The checklist helps to assess the extent to which gender mainstreaming strategies (GEMS) have been included in the planning, preparation, implementation and reporting of your meeting or training events (forum, seminar, conference, workshops and/or coaching). Also provided are tips on how to ensure a good mix of men and women in meetings and training workshops, when to have separate meetings for women and for men, how to increase women's participation and how to make gender everybody's business. Finally, examples are given of gender equality clauses for inclusion in invitation letters.



#### **Aims:**

- To ensure that the views, concerns and needs of both women and men are raised, reflected and acted upon in all policy, training and advocacy meetings
- To enable equal opportunities and treatment between men and women in benefiting from capacity building events and to close gender gaps in this respect if these exist



**Users:** Staff members of ILO partner organizations and the ILO, policy and training consultants

### 9.2 Rationale

#### **Box 9.2.1**

#### **Why is it important to address gender in meetings and training?**

Women are often excluded from decision making mechanisms and processes as leadership positions automatically go to men in many societies. Many ILO partner institutions such as ministries of labour and social welfare and employers' and workers' organizations tend to be male-dominated. In such cases, women's voice is likely to be absent from policy debates. This means that women's concerns are invisible, and women's needs and gender inequalities are marginalized.

In many societies and workplaces women lack access to training and career promotion opportunities, as investment in men is considered more profitable. Men are also more often given the chance to participate in capacity building events, because women may face practical constraints to leave their homes, including their responsibilities for paid work, household duties and family care. Or, they may not be allowed to travel alone.

Meeting organizers also often face other gender challenges. For example, when a mixed audience would be ideal and both men and women have been invited, only women turn up at gender training events, and mostly men come to events not labeled 'gender training'. In other words, gender is viewed a 'women-only' issue.

In development assistance, meetings are a crucial means for knowledge sharing, advocacy, capacity building and decision making. When gender inequalities exist, especially if they are pronounced, gender equality promotion requires a serious debate among various participants and stakeholders, who may have diverging views on the issue.

Meeting organizers should, therefore, ensure the following for all meetings/workshops:


- getting the right sex balance
- voice for the minority (women or men)
- tabling gender concerns and priorities.

## 9.3 Checklist and tips

### Checklist 9.3.1 How do you integrate gender equality in meetings and training?

If most of the answers to the following questions are 'yes', it means the activity is gender-responsive. If more than half of the answers are 'no' or 'not sure', more attention is needed to integrate gender concerns into the activity.

| Strategic fit  | Yes | No | Not sure |
|--|-----|----|----------|
| 1. Do meetings and capacity building workshops regularly include explicit attention to the gender dimensions of the work, programme or project of your organization?   |     |    |          |
| 2. In case there are pronounced gender inequalities in the work, programme or project, have any meetings or training events been organized which are specifically dedicated to the gender dimensions of the work of your organization?                     |     |    |          |
| 3. Should the meeting or training workshop include or be dedicated to addressing gender inequalities?  |     |    |          |
| 4. In case women are barred from attending public events or in case the subjects for discussion are sensitive (such as gender-based violence), is there a need to organize separate meetings/workshops for women or men to address gender-specific topics? |     |    |          |
| Planning & Design  | Yes | No | Not sure |
| 5. Does the planning document show that a gender perspective will be incorporated in the technical report(s) or training materials for the meeting/workshop?   |     |    |          |
| 6. Are gender issues related to the meeting/workshop theme(s) reflected in the technical report(s) or training materials for the meeting/workshop?   |     |    |          |
| 7. If there are gender issues, are they reflected on the agenda?   |     |    |          |
| 8. If gender expertise is required at the meeting/workshop, has it been included in the TOR as a prerequisite for selecting workshop trainers/facilitators and resource persons?   |     |    |          |
| 9. Are sufficient resources for gender expertise included in the budget?   |     |    |          |
| 10. Do logistical arrangements provide for equal, adequate and safe participation of women and men?  |     |    |          |
| 11. Is there a gender balance among key speakers and participants?   |     |    |          |
| 12. If it is expected that nominating organizations will mainly select men, have any specific measures been undertaken to encourage the selection of women as participants and resource persons?   |     |    |          |
| Preparation & Implementation (getting the right people)  | Yes | No | Not sure |
| 13. Do selected trainers/facilitators and resource persons have sufficient gender knowledge in general and familiarity with the gender dimensions of the workshop theme in particular?   |     |    |          |

|  |            |           |                 |
|--|------------|-----------|-----------------|
| 14. Have participants and partner organizations been invited who are capable of contributing to the achievement of gender equality?<br> For example, Ministry of Gender Equality, women/gender agencies in Ministry of Labour, gender focal points/women's desks of trade unions and employers' organizations, NGOs working on gender equality, Gender/Women's Studies departments in universities          |            |           |                 |
| 15. Are the logistics organized to facilitate participation of men and women (e.g. convenient meeting time, date and venue, safe transportation and lodging for women)?  |            |           |                 |
| 16. Are both men and women equally encouraged and given opportunity to give their views and provide inputs to the discussion and meeting activities?   |            |           |                 |
| 17. Is there a mechanism in place that monitors the following during the meeting and workshop? <ul style="list-style-type: none"> <li>• Results and outcomes on equal opportunity and treatment of women and men in the world of work</li> <li>• Institutional goals related to gender equality</li> <li>• Balanced contributions by male and female participants</li> <li>• Sex balance among resource persons</li> <li>• Resources allocated and spent on gender equality goals</li> </ul> |            |           |                 |
| <b>Reporting</b>   | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 18. Does the report give a breakdown of male and female participants and indicate their status (e.g. junior, middle, senior)?  |            |           |                 |
| 19. Does the report specify the gender issues, if any, on the agenda and how they were discussed?  |            |           |                 |
| 20. Does the report indicate how men and women took part in the discussion and activities (equally or unequally) and whether both participated in any decision making during the meeting or training?  |            |           |                 |
| 21. Does the report indicate any progress made in terms of promoting gender equality, as well as identify any individuals or groups supporting or resisting gender equality promotion in any particular area?  |            |           |                 |

### Tip 9.3.1

### How to ensure gender equality promotion in policy debates and in capacity building events?

#### How to decide on the right mix of men and women in meetings and training

As meetings and workshops form an opportunity for advancement and networking for all participants, organizers should decide in advance on the desired sex composition for the event. While the actual targets for women's and men's participation will depend on the issue, the sector and the setting at hand, organizers need to **determine in advance** who will be trained on what, how women's views will be represented in policy meetings and how to attract men to gender meetings. Generally, organizers need to **set specific numerical targets for the participation of women and men** at any event. Below are tips for doing so effectively:

- ✓ Invite more women to general and official meetings and workshops.
- ✓ Invite more men to gender-specific events.

*continued on page 65*

### Tip 9.3.1... from page 64

- ✓ Aim for a male-female attendance ratio in the range of 40-60 per cent in mixed-sex meetings and workshops to allow for balanced representation of male and female views. If an equal ratio is not possible, ensure representation of *at least* 1/3 of either sex to allow for sufficient voice of the underrepresented group.
- ✓ Avoid tokenism, i.e. including only one or a few women or men to make it appear 'both sexes' have voice in the meeting or workshop.
- ✓ Set a target of training 2/3 of women and 1/3 of men, when the capacity of female training professionals or leaders needs to be built, to redress the effects of (past) discrimination or for role-model purposes.

#### When to have separate meetings for women and for men

- ✓ When there is strict sex segregation in the society.
- ✓ When the topics of discussion are sensitive and tenuous between the sexes, such as sexuality, reproductive health and gender-based violence at home or at work (followed by mixed-sex groups later on).
- ✓ When cultural or religious customs strongly discourage or prohibit women and girls to speak up in the presence of men and boys.
- ✓ When there is a need to build up women's self-confidence and capacity, and to encourage them to speak more freely, first among themselves and as appropriate later in mixed-sex groups.

#### How to increase women's participation in meetings and workshops

- ✓ Be sensitive to the practical obstacles to women's participation, such as their family responsibilities, cultural and religious customs discouraging women's participation in public affairs or women's travelling alone, and concern for personal safety and security.
- ✓ Plan or assist in providing practical and logistical arrangements to facilitate their participation such as:
  - meeting place and time that are convenient
  - adequate travel and transportation arrangements to and from the event
  - safety and security at the venue and accommodation
  - child care facilities, as necessary
- ✓ Provide additional resources required to ensure women's participation, for example, in cases in which women are not allowed to travel alone, invite two women instead of one.

#### How to make gender everybody's business, and not just women's business

- ✓ Avoid creating a divide between men and women, for example, do not stereotype all women as victims and all men as aggressors as this is misleading and not true.
- ✓ Actively involve men and boys in the activities to promote gender equality
- ✓ If there is resistance in the workplace, community or institution to address gender inequalities, identify and invite respected, and where possible both female and male, gender advocates to support gender activities.



***Women are not by definition promoters of gender equality, nor are men by definition against it. But, the majority of women are likely to be active change agents as they share gender related constraints with other women in their society.***

Source: B. Suriyasarn, R. Terhorst and N. Haspels: *Empowerment for children, youth and families: 3-R trainers' kit on rights, responsibilities and representation* (Bangkok, ILO, 2006), Book 1 User Guide, Section 3.5 How to design and conduct effective training on gender equality, pp. 15-25.

**Tip 9.3.2****How to promote gender equality in training content and process****Training content**

- ✓ *Identify participants' perspectives on gender equality promotion at the early start of the training* to carry out a quick scan of participants' gender perspectives and set the scene for effective gender training in an attractive and non-threatening way.
- ✓ *Avoid jargon, keep it simple and to the point.* The concepts, definitions and strategies for gender equality promotion are straightforward and easy to understand (see Tool 1: Key concepts and strategies). Everybody with any level of education has an idea of what is just and fair. Appealing to these feelings of social justice and common sense is much more effective than getting into academic discussions and elaborate 'gender jargon'.
- ✓ *Design and use training materials that are relevant to the day-to-day experience of female and male participants* and highlight gender problems from the female and male perspective. Use language that address both sexes.
- ✓ *Address concerns about different forms of discrimination simultaneously* (i.e. sex, age, ethnicity, geographical origin and migrant status), as it is not convincing and ineffective to address gender inequalities but not other forms of inequalities.

**Training process**

- ✓ *Ensure enough 'speaking time' for both sexes.* Men are generally more used to public speaking and tend to talk longer. If this happens, let the speaker finish but ask him to be brief. Women are often shy and need to be encouraged to speak. However, when a woman is too talkative, the same rule applies.
- ✓ *Resist making sweeping generalizations and ensure respect for everybody.* Draw out the women's perspective and respect the men's perspective, and vice versa as appropriate.
- ✓ *Do not assume that all women have the same understanding of gender issues.* Women are not a homogenous group and will usually be more loyal to men of their own socio-economic or religious and cultural group, than to women from other backgrounds.
- ✓ *Address sexist jokes proactively.* If men or women feel threatened by the subject they may start to make sexist jokes, use derogatory language about women (or men). Address this type of behaviour immediately by asking the persons in question whether they really believe what they say and why they believe it. Ask other participants for their opinion and start a discussion on the subject. It is important to make it understood (politely but firmly) that disrespectful behaviour is not tolerated.

---

Source: Ibid.

**Tip 9.3.3****Example gender equality clauses in invitation letters for ILO-supported events**

Experience has shown that ILO constituents tend to send mostly men to general ILO-supported events and women to gender-specific ILO-supported events. Therefore, the ILO encourages the constituents to send women to ILO official meetings and training workshops, and men to gender-specific events.

**Standard clause in invitation letters for official ILO meetings:**

*In conformity with Resolutions of the International Labour Conference, the participation of women in ILO meetings is encouraged.*

**Standard clause in invitation letters to other ILO-supported events:**

*The ILO is committed to gender equality in all programmes and activities and encourages participating organizations to ensure that at least 30 per cent of their representatives to the event/meeting/workshop are women or men respectively.*



# Tool 10. How to make media products and processes gender-responsive

## 10.1 About this tool<sup>27</sup>

This tool explains what media products are and why it is important to highlight gender equality promotion in media products and processes. It gives a checklist to assess to what extent the media products, the core media messages and the production and distribution of media products are gender-responsive. Standard gender equality statements used in ILO media products are provided, as well as tips for effective gender advocacy in the media.



**Aims:** To prepare and disseminate ILO-supported media products and processes in a gender-responsive manner



**Users:** Communication and public information officers and all staff of ILO and its partner organizations

## 10.2 Concepts and rationale

### Box 10.2.1 What is a media product?

A media product can be in print, audio, video or multimedia format: a paper or electronic document (e.g. press release, article, brochure, publication, web page or website), audio or video presentation, or a webcast or podcast on the internet. There are many media channels nowadays.

Media products may be delivered on a regular basis or as part of a specific media campaign or event – targeted at the general public through traditional media (radio, television, newspapers, magazines) and/or new media like the internet, or tailor-made for a specific audience like a press conference or a meeting of a specific group.

### Box 10.2.2 Why is it important to have gender-responsive media products and processes?

Gender inequality is ingrained in language, in pictures and in other information that is shared in families, workplaces and society. 'Gender neutral' or 'gender blind' messages and materials tend to implicitly reinforce traditional gender roles and stereotypes and perpetuate inequalities that need to be eliminated. Media products of the ILO and its partners should reflect the universal commitment to achieve gender equality, decent

work, and equal opportunity and treatment for all.

Media messages need to affirm gender equality goals clearly and consistently and development organizations should project 'positive gender images. It is vital to not only highlight inequalities, abuses and exploitation but to also emphasize and showcase successes, solutions, achievements and good practices.




<sup>27</sup> Adapted from: ILO: *Media handbook: How to communicate with the media*, Gender equality: A key ILO commitment (Geneva, 2003); and ILO: Bureau for Gender Equality, *Gender mainstreaming: A management tool for promoting gender equality in technical cooperation projects within the ILO/Netherlands Partnership Programme 2004-2006, Checklists and recommendations*, Checklist 6: Gender sensitive information products, Geneva, no date.



## 10.3 Checklist and tips

### Checklist 10.3.1

#### How do you reflect gender equality in your media products and processes?

If most of the answers to the following questions are 'yes', it means the media products are gender-responsive. If more than half of the answers are 'no' or 'not sure', more attention is needed to integrate gender equality promotion into the products.

| <b>Messages – Do your media products:</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
|--|------------|-----------|-----------------|
| 1. Provide information and data broken down by sex?  |            |           |                 |
| 2. Present the views and priorities of both women and men?   |            |           |                 |
| 3. Highlight possible differences between men and women (e.g. in terms of gender roles, labour market position, or the effects of economic, social and labour policies)?   |            |           |                 |
| 4. Promote the goal of equal partnership between men and women in workplaces, at home and in communities?  |            |           |                 |
| 5. Have explicit gender equality promotion messages?   |            |           |                 |
| 6. Refer to international, national or local agreements, or milestones, on gender equality?  |            |           |                 |
| 7. In the case of promotional or public relations materials such as brochures promoting the organization's or unit's work: <ul style="list-style-type: none"> <li>• Accurately represent the real situation of both men and women?</li> <li>• Portray your organization or unit as a promoter of gender equality?</li> <li>• Showcase good practices and successes in achieving gender equality?</li> </ul>  |            |           |                 |
| <b>Audio and visual – Do your media products:</b>  | <b>Yes</b> | <b>No</b> | <b>Not sure</b> |
| 8. Show balanced participation of both sexes in the images (e.g. photos, drawings, video clips, other visuals) and the soundtrack (e.g. interviews of experts, decision makers, the 'common' worker)?<br><br> Generally, avoid gender stereotypes especially if they portray one or the other sex in a negative light, unless the media message aims at changing harmful stereotypes. |            |           |                 |
| 9. Reflect diversity and sensitivity in terms of age, sex, colour, ethnicity and disability?<br><br> Show pictures of women and men from various ages, ethnic and racial backgrounds.   |            |           |                 |
| 10. Portray diverse and non-stereotypical gender roles?<br><br> Show women and men in the same jobs, in different jobs, and in non-traditional roles, such as men as caregivers and women as supervisors.   |            |           |                 |

| Language – <i>Do your media products:</i>  | Yes | No | Not sure |
|--|-----|----|----------|
| <p>11. Use language to reflect the actual male-female balance in the populations referred to instead of 'gender-blind' terms which often result in women and girls becoming invisible?</p> <p> Specify <i>women working in the informal economy</i> instead of <i>informal economy workers</i>; <i>male and female migrant workers</i> instead of <i>migrant workers</i>; <i>girls</i> or <i>boys</i> instead of <i>children</i>.</p> |     |    |          |
| <p>12. Use 'gender-sensitive' language instead of sexist terms?</p> <p> Avoid using male nouns and pronouns as 'generic' terms for both sexes, and use genuinely sex-neutral terms such as <i>human resource</i> instead of <i>manpower</i>; <i>working hours</i> instead of <i>man-hours</i>; <i>village head</i> instead of <i>village headman</i>; <i>homemaker</i> instead of <i>housewife</i>.</p>                               |     |    |          |
| Production and distribution of media products  | Yes | No | Not sure |
| <p>13. Is gender equality promotion systematically included in media and outreach campaigns?</p>   |     |    |          |
| <p>14. Is the representation of both sexes consistently considered when developing visual materials?</p>   |     |    |          |
| <p>15. Is there a policy and/or standard of practice to promote positive images and women and men and avoid images that perpetuate traditional sex stereotypes and gender inequalities in the media products?</p>  |     |    |          |
| <p>16. Are the needs and roles of both women and men taken into account when developing and adapting training and advocacy materials?</p>  |     |    |          |
| <p>17. Does your organization/programme/project disseminate knowledge and information on gender through:</p> <ul style="list-style-type: none"> <li>• Research and Publications</li> <li>• Library and Documentation</li> <li>• Seminars, Conferences, Meetings</li> <li>• Radio and television, or other audio and visual media</li> <li>• Websites, social networking sites and blogs?</li> </ul>  |     |    |          |
| <p>18. Do the media products indicate whether sources of information on gender issues are widely accessible, and to whom?</p>  |     |    |          |
| <p>19. Have you selected media channels that will reach both men and women?</p>  |     |    |          |

**Tip 10.3.1****Gender advocacy messages: How to deal with tricky questions**

- Q.** Our women are happy with the way life and work is organized in our society. We see no need to change, why should we?
- A.** Have you asked the women who are disadvantaged? Richer women and men who belong to the well-off parts of society have often not faced discrimination themselves and may not see the need for change. The picture changes if you ask those who suffer from discrimination.
- Q.** In Asian society we highly value our women as mothers and caretakers of the family so there is no gender inequality in our society. What is the problem?
- A.** If all women and men are happy in a society with the way the relations between men and women are organized, there is indeed no problem. However, when there are unequal power relations between men and women in a society, those who suffer from these inequalities are usually keen to change. Giving high esteem to women and mothers in general does not mean that there is equal sharing between workload and decision making. Nor does it mean that girls and boys have equal chances in life. Giving value to women only in their roles of mothers and caretakers of the family also may mean a disregard for the value of their other roles and responsibilities. You need to look for the facts, do a sound gender analysis, ask women and men from all spheres of life what is the situation and then base your action on facts not only on values and beliefs which may turn out to be myths.
- Q.** Are we not imposing western feminism on other societies?
- A.** The demand for gender equality evolved both from developed and developing countries and has strong roots in all civil societies. Not only women in the West, but women from all countries have been aware and have struggled against women's oppression and inequality in society for decades. The women's movement has been active in all parts of the world to improve women's position.
- Q.** Isn't it culturally inappropriate to try to change gender relations through development activities?
- A.**
- All societies in the world change constantly and are not static, nor harmonious. People all over the world struggle for justice and equality of opportunity and treatment. The concept of the 'traditional culture' which should not be touched or changed is too easily used as a way of keeping power in the hands of a few. One should consult especially with women groups in society to find out their views.
  - All development activities, whether they are about labour legislation, health care, road construction, employment promotion or vocational training, are interventions and promote changes in attitudes and behaviour.
  - With regard to gender equality, especially women but also men in the concerned societies need to decide what actions and strategies they prefer and are appropriate to improve gender equality in their society.

**ILO vision**

- “Promoting gender equality is not only the *right* thing to do. It is also the *smart* thing to do.” – *Juan Somavia, ILO Director General, 8 March 1999*
- Equality for women and men in the world of work is a core value of the ILO. Gender equality is a matter of social justice and is anchored in both a rights-based and an economic efficiency approach. Gender equality is now globally accepted as a necessity for sustainable development and poverty reduction for women and men, improving living standards for all.
- The overall objective of the ILO is to promote equal opportunities for women and men to obtain decent and productive work, in conditions of freedom, equity, security and human dignity. Decent work, gender equality and non-discrimination are universal goals.
- Since its founding in 1919, the ILO has been committed to promoting the rights of women and men in the world of work and to achieving equality. The ILO promotes gender equality – not only as a basic human right – but also as intrinsic to the global goals of decent work and poverty alleviation and as an instrument for a more inclusive globalization. Therefore, the ILO regards gender equality as an essential condition for achieving social and economic development.
- The global economic crisis and its aftermath mean the world faces the prospect of a prolonged increase in unemployment, deepening poverty and inequality. The ILO should contribute to a fair globalization, a greener economy and development that more effectively creates jobs and sustainable enterprises, respects workers’ rights, promotes gender equality, protects vulnerable people, assists countries in the provision of quality public services and enables countries to achieve the Millennium Development Goals. There is a need to enhance support to vulnerable women and men hit hard by the crisis, including youth at risk, low-wage, low-skilled, informal economy and migrant workers.

**ILO approaches**

- The ILO has adopted a two-pronged approach to promoting equality between men and women:
  1. Bringing gender issues into the mainstream by including women’s and men’s priorities and needs in all policies and programmes.
  2. Gender-specific interventions, to empower one or the other sex, generally women as they are more likely to experience gender-based social, political or economic disadvantage by targeting either women or men exclusively or women and men together to address inequalities.
- The ILO aims to achieve an equal and equitable world of work by promoting gender equality through:
  - development, ratification and application of international labour standards
  - policy development and advocacy
  - technical cooperation and development assistance
  - knowledge management, dissemination and sharing.
- ILO approaches gender equality as:
  - A matter of *human rights* and an essential condition for achieving effective democracy. Women make up half the population and more than one-third of the workforce. Their right to equality of opportunity and treatment in employment must be expressed by their participation at all levels of activity.
  - A matter of *social justice*, by improving women’s access to employment and training, and their conditions of work and social protection.
  - A matter of *sustainable development* by promoting the participation of women in decision making, and their involvement in shaping development and labour policies and practices.

*continued on page 72*

### Tip 10.3.2... from page 71

#### ILO Mission statements

- The *ILO Action Plan for Gender Equality* is an ILO instrument for realizing gender equality in its Decent Work Agenda. It supports ILO constituents' efforts toward the goals of productive work for all women and men in conditions of freedom, equity, security and human dignity. It also serves a larger global development agenda due to many regional and national initiatives linking decent work with the global poverty reduction agenda and achievement of the Millennium Development Goals (MDGs).
- The ILO's mandate to promote equality is enshrined in its Constitution and in a number of international labour standards. Key gender equality Conventions cover equal remuneration, non-discrimination in employment and occupation, workers with family responsibilities and maternity protection. This commitment is expressed in several resolutions adopted on gender equality by the International Labour Conference, for example, on the promotion of gender equality, pay equity and maternity protection in 2004, and on gender equality at the heart of decent work in 2009.
- There is increasing empirical evidence, as highlighted in the 2007 Global Report, *Equality at Work: Tackling the challenges*, of the role that gender inequality plays in constraining productivity, growth and prosperity. Likewise, there is convincing evidence that addressing such inequality benefits individuals and families, workers and employers, and society and national economies. Improving women's earnings is a key element in tackling poverty and achieving the MDGs. More women work in the paid economy today than ever before, while continuing to undertake unpaid reproductive work. There are trade-offs for such women, their families and society as a whole, from engagement in the labour force; there are also barriers to overcome to ensure that women and men have equal opportunity to participate in economic activities. Thus, all ILO constituents – workers, employers and governments – would benefit from achieving gender equality in the world of work.
- The principle of equality among women and men is central to the ILO 1998 *Declaration on Fundamental Principles and Rights at Work and its Follow-up*. Recognizing that globalization is a factor of economic growth and that economic growth is a prerequisite for social progress, ILO member States in their realization that it by itself does not guarantee progress, adopted the Declaration and laid down social ground rules founded on common values to enable all those involved to claim the fair share of the wealth they have helped to generate.
- The ILO's Decent Work Agenda holds gender equality central in its four strategic areas of promoting basic human rights at work, expanding opportunities for quality jobs, ensuring social protection, and ensuring the freedom to organize and promoting social dialogue and representation among its partners. At the 2005 World Summit of the United Nations General Assembly, heads of State and Government of more than 150 countries made a commitment to implement a wide-ranging international agenda requiring global, regional and national action: "We strongly support fair globalization and resolve to make the goals of full and productive employment and decent work for all, including women and young people, a central objective of our relevant national and international policies as well as our national development strategies, including poverty reduction strategies, as part of our efforts to achieve the Millennium Development Goals." (General Assembly resolution 60/1, 2005 World Summit Outcome paragraph 47. This commitment was reiterated in at the high-level 2006 session of the United Nations Economic and Social Council through the adoption of a Ministerial Declaration, Report of the Economic and Social Council for 2006 (A/61/3)).

---

Sources: ILO, *Recovering from the crisis: A global jobs pact*, Provisional record 19A, International Labour Conference, 98<sup>th</sup> Session, Geneva, 2009; ILO, *Resolution concerning Gender Equality at the Heart of Decent Work*, Provisional record 19, International Labour Conference, 98<sup>th</sup> Session, Geneva, 2009; ILO, *ILO Declaration on Social Justice for a Fair Globalization*, International Labour Conference, 97<sup>th</sup> Session, Geneva, June 2008; ILO, *The ILO action plan for gender equality 2008-2009*, Governing Body, GB 300/5, 300<sup>th</sup> Session, Geneva, November 2007; ILO, *ILO & gender equality at work: Beijing +5 and beyond*, Geneva, 2000; ILO, *ILO Declaration on Fundamental Principles and Rights at Work and its Follow-up*, Geneva, 1998; ILO, *Resolution concerning the Promotion of Gender Equality, Pay Equity and Maternity Protection*, Record of proceedings, Volume II, International Labour Conference, 92<sup>nd</sup> Session, Geneva, 2004, GB 291/3.

## Tool 11. GEMS in the working environment

---

### 11.1 About this tool<sup>28</sup>

This tool explains what a ‘family-friendly’, gender equal and violence-free workplace is and what the benefits are for employers and workers. It shows how to promote equality at work in day-to-day workplace practices. The checklist provides a tool to assess to what extent your workplace has policies and practical measures in place to enable workers to balance work and family responsibilities and to ensure a productive workplace climate and environment. Tips are also given on how workplaces can be made more gender equal and how to promote respect and prevent violence at the workplace.



**Aims:** To make your workplace family-friendly, gender equal, free of violence and respectful to all



**Users:** Employers, workers, human resource departments, heads of unit, programme or project managers

### 11.2 Concepts and rationale

#### Box 11.2.1 What is ‘family-friendly’?

Being a family-friendly organization goes beyond being just child- or women-friendly. More employers are now recognizing that employees need to balance their work and family responsibilities and accept that such responsibilities can have an impact on employees’ working lives. A family-friendly employer understands that it is important to

make ‘family-friendly’ arrangements available to all employees, not only those with care responsibilities. A family-friendly organization tries to reconcile and strike a better balance between work and family responsibilities for all its workers. It supports them in carrying out their work productively and meeting their outside work commitments.

---

<sup>28</sup> Sources: ILO: *The ‘family-friendly’ workplace*, Information sheet No. WF-3, *Addressing gender equality through work-family measures*, Information sheet No. WF-2, and *Making work arrangements more family-friendly*, Information sheet No. WF-5 (Geneva, Conditions of work and employment programme, 2004), ILO: *Violence at work*, 3<sup>rd</sup> ed. (Geneva, 2006), pp. vi, 20-22; and ILO: *Action against sexual harassment at work in Asia and the Pacific* (Bangkok, 2001), p. 17.

**Box 11.2.2 What is violence at the workplace?**

Workplace violence includes any action, incident or behaviour that departs from reasonable conduct in which a person is assaulted, threatened, harmed, injured in the course of, or as a result of, his or her work. It can take the form of murders, assaults, rape, sexual harassment, threats, bullying, mobbing and verbal abuse:

- **Sexual harassment** means unwanted conduct of a sexual nature, or other conduct based on sex, affecting the dignity of a person. It includes physical, verbal or non-verbal conduct that is

unwelcome, unreasonable and offensive to the recipient. Both women and men – regardless of their age, marital status, physical appearance, background or professional status – can be victims of sexual harassment. Usually, however, women workers are more vulnerable due to their lower position in the labour market.

- **Bullying and mobbing** consist of repeated, regular and persistent negative attacks on the personal and professional performance of an individual or group of employees.

**Box 11.2.3 Why is it important to have a workplace that is family-friendly, free from violence and respectful to all?**

A family-friendly and respectful workplace has **benefits for both the employee and employer** and is a **win-win situation** for all.

| Benefits for the Employee   | Benefits for the Employer   |
|---|---|
| <ul style="list-style-type: none"> <li>• Reduced stress from reduced conflicts between work and family responsibilities and improved mental health</li> <li>• A sense of empowerment in a more supportive working environment</li> <li>• Increased efficiency and productivity</li> <li>• Increased job satisfaction and morale</li> <li>• Improved working conditions due to better enjoyment of labour rights such as annual leave, sick leave, etc.</li> </ul> | <ul style="list-style-type: none"> <li>• Increased productivity from enhanced performances and employees' motivation</li> <li>• Decreased staff turnover and fewer costs for recruitment and training of replacements</li> <li>• Lower costs for decreased workplace-related accidents</li> <li>• Reduced absenteeism and lateness</li> <li>• Enhanced capacity to attract and retain high-quality employees</li> <li>• Improved relations with workers</li> <li>• Positive image of the family-friendly company</li> <li>• Improved competitiveness</li> </ul> |

The **effects of workplace violence are detrimental** to employees' employment, promotion prospects and job security, and to the morale, productivity and reputation of the organization.

- The stressful and hostile working environment resulting from violence can cause tension, anger, anxiety, depression and other stress-related illnesses for the victims and an uncomfortable atmosphere for other employees.
- The intensity of violence can cause the victims to leave the job, in turn causing loss of opportunity for career advancement. Worse, the victims may be unfairly dismissed or given a bad reference due to the position and influence of those who harass or bully.
- A hostile working atmosphere can lead to conflicts, absenteeism and poor morale among employees, causing lower productivity for the organization.
- In addition to negative image, the organization may suffer from high staff turnover, potential loss of high quality employees, lack of staff's loyalty, and loss of potential income.



## 11.3 Checklist and tips

### Checklist 11.3.1 How family- and equality-friendly is your workplace?

If most of the answers to the following questions are 'yes', it means your workplace is friendly and supportive. If more than half of the answers are 'no' or 'not sure', serious attention is needed to make your workplace more family-friendly, gender-equal, free of violence and respectful to all.

| Policy  | Yes | No | Not sure |
|---|-----|----|----------|
| 1. Are there policy measures, rules and/or regulations in your organization that promote the value to balance work and family responsibilities?   |     |    |          |
| 2. Does the leadership of your organization show commitment to promote the values of work-life balance, e.g. by example and/or by encouraging line managers to implement work-life balance measures?  |     |    |          |
| 3. Has any assessment of the needs of staff to balance work and family responsibilities been conducted in your organization?  |     |    |          |
| 4. Have the results of the needs assessment been translated into concrete family-friendly policies and practical measures?  |     |    |          |
| 5. Has any evaluation or review of the content of the existing policies, rules and regulations been conducted to improve the work-life balance for staff?   |     |    |          |
| 6. Are there policy measures, rules and/or regulations providing for maternity protection for women, paternity leave for men after child birth/adoption, and career breaks for female and male employees with young children or other dependants? |     |    |          |
| 7. Do arrangements exist to enable employees to deal with family emergencies?   |     |    |          |
| 8. Are there policy measures, rules and/or regulations to prevent and address discrimination on the grounds of sex, race, ethnicity, or health status (e.g. disability and HIV/Aids)?   |     |    |          |
| 9. Are there policy measures, rules and/or regulations to prevent and address sexual and racial harassment and mobbing at the workplace?  |     |    |          |
| 10. Is there a policy, rule or an implicit understanding that is observed in your organization which discourages gender stereotyping (e.g. women are always expected to clean and serve coffee)?  |     |    |          |
| Actual practices  | Yes | No | Not sure |
| 11. Are training and career development opportunities provided to all staff irrespective of their grade, sex, age, race, or ethnicity?  |     |    |          |
| 12. Are men and women given equal opportunities to be actively involved in family life (e.g. both women and men are given leave or flexible work arrangements for family emergencies, illness or care of family members)?                         |     |    |          |

|  |  |  |  |
|--|--|--|--|
| 13. Does the definition of 'family' extend beyond children and spouse to include any person dependent upon an employee (female or male) such as an elderly dependent, an ill parent or sibling, a disabled partner, or a same-sex partner?   |  |  |  |
| 14. Is special consideration given to pregnant women and nursing mothers in terms of suitability of job, workload and working conditions?  |  |  |  |
| 15. Are breastfeeding breaks and facilities provided for pregnant women and nursing mothers (e.g. breast-feeding room for nursing mothers and day beds for pregnant women to rest)?  |  |  |  |
| 16. Are appropriate facilities provided for both women and men (e.g. separate bathrooms) and disabled workers (e.g. wheelchair ramps, elevators and bathrooms)?  |  |  |  |
| 17. Have any employees in your organization successfully negotiated for flexible work arrangements in relation to family responsibilities or maternity or paternity (e.g. flexible working hours, part-time work, job-sharing, work from home and telecommuting)?                          |  |  |  |
| 18. Are there facilities or measures for child care and elderly care (e.g. workplace nurseries or subsidies for child care, workplace support for employees taking care of a family member)?   |  |  |  |
| 19. Do employees have access to information and training about the family-friendly and violence-prevention policies and measures (e.g. information kits, contact information during leave, courses and workshops)?   |  |  |  |
| 20. Are line managers given support and relevant training to promote the implementation of family-friendly, gender equal and violence-free policies throughout the organization?   |  |  |  |
| 21. Has there been any complaint about violence, such as sexual harassment at your workplace?  |  |  |  |
| 22. If there have been complaints about violence in your workplace, have any investigations been conducted?  |  |  |  |
| 23. Is it easy for someone to file a complaint about sexual harassment or other violence at your workplace?  |  |  |  |
| 24. Would you describe the day-to-day treatment of women and men at your workplace as equally respectful (in terms of respect for their professional ability, contribution to the company/organization, and social status)?  |  |  |  |
| 25. Would you describe the day-to-day treatment of people of different cultures, ethnicities, disabilities, sexual orientations at your workplace as equally respectful (in terms of respect for their professional ability, contribution to the company/organization, and social status)? |  |  |  |
| 26. Has any gender or cultural sensitivity training been provided to workers in the organization?  |  |  |  |

***Treat everybody at work with respect, irrespective of their sex, status or other characteristics, and avoid gender stereotyping in day-to-day workplace practices***

***Promote better work-life balance between men and women with and without family responsibilities:***

- **More equal sharing of household and family responsibilities between men and women**  
*The competent authorities ... should take appropriate measures ... to promote such education as will encourage the sharing of family responsibilities between men and women.* (Recommendation No. 165 on Workers with Family Responsibilities, para 11(b))
- **Make work more compatible with family responsibilities**  
Take measures to improve working conditions and the quality of life including measures aimed at:
  - ✓ *Progressive reduction of daily hours of work and the reduction of overtime*
  - ✓ *More flexible arrangements as concerns working schedules, rest periods and holidays* (Recommendation No.165 on Workers with Family Responsibilities, Art. 18)



***Flexi-time*** requires employees to be present at their place of work for certain specified periods (called 'core time'), and allows them to vary their starting and finishing times. There are two types of flexi-time:

- ✓ ***Formal flexi-time***: fixed number of working hours, but workers can choose their daily working hours, provided that they cover "core-hours"
  - ✓ ***Informal flexi-time***: flexibility on daily hours, such as taking a short lunch break and leaving early, or allowing a half-hour flexibility to arrive early or leave early
- **Make family responsibilities more compatible with work**  
*All measures compatible with national conditions and possibilities shall be taken ... to develop and promote community services, public or private such as childcare and family services and facilities* (Convention No. 156 on Workers with Family Responsibilities, Art. 5(b))
  - **Enabling men and women to take family emergency leave**



It is vitally important that practical measures to better balance work and family are made available to both male and female employees. In some countries, only workplaces with many women workers are obliged to provide child care facilities or only female employees are allowed to take emergency leave to take care of their young children when they fall sick. These measures have often been designed to make it easier for women to cope with both paid work and their family and household responsibilities. Such measures are counterproductive as they lead to higher costs of individual female employees to individual employers in practice and thereby discrimination of women in the labour market. Women will either not be hired at all, or be given lower pay as employers will want to offset these higher costs.

**What can you do if you encounter violence at work?**

- Take action and object to disrespectful behaviour against yourself or another worker.
- Do not think it is your fault, if someone harasses you. Speak to the harasser and point out what you find objectionable. Talk to other employees and ask them if they are experiencing the same problem with the person.
- Discuss the problem with friends, family and co-workers or a manager whom you can trust to get feedback and ideas on how to solve it.
- Keep records at home of what happened: exactly what was said, names of witnesses, date, time, locations of the incident. Save any letters, cards, notes in a safe place.
- If the unwelcome behaviour persists, tell the person in writing that you object to such behaviour. Be specific and keep a copy of the letter.
- Speak to your supervisor. If the harasser is your supervisor, speak to his or her boss. Bring copies of records and other documentation that you have. Keep the original or copies for yourself too.
- If these steps fail to solve the problem, seek advice from another body (e.g. trade union or other workers' association to which you belong, the personnel department, the sexual harassment committee, women's or legal aid center), and file a complaint. Violence is against the law in most countries.
- File criminal charges with the police in case of sexual assault and rape. Take somebody you trust with you.

**What can employers do to prevent violence at the workplace?**

Effective measures to prevent, address and redress workplace violence are:

- Create awareness on the importance of respect for all workers irrespective of their sex, age, ethnicity, race or health status and be a role model in this respect.
- Develop a policy against workplace violence defining the problem and outlining the procedures to deal with it.
- Disseminate readily available and easy-to-understand information to explain the policy and measures that workers can take. Remove inappropriate materials, such as nude posters from the workplace.
- Train managers and workers. Make everybody accountable for their own conduct and ensure managers enforce standards of zero-tolerance against violence.
- Improve the safety of the working environment, such as well-lit workplaces and have equal numbers of men and women of different ranks at all workstations.
- Make panels rather than individuals responsible for personnel recruitment and promotion.
- When violence problems arise at work, discuss them openly with employees. Consult women or gender experts as women workers especially from the lower ranks may be too shy to speak up.
- Set up a committee for investigation and respect in the workplace, consisting of employees and managers, and women and men from all levels in the job hierarchy to develop, implement and monitor programmes against workplace violence.

---

Source: Adapted from *Sexual Harassment Is a Trade Union Issue: A Worker's Handbook* by Development Action for Women, Trade Union Congress of the Philippines (DAWN-TUCP), 2001, in Annex 5 Information Booklet of *Sexual Harassment in Neliën Haspels, Zaitun Mohamed Kasim, Constance Thomas & Deirdre McCann, Action against Sexual Harassment at Work in Asia and the Pacific*, ILO, Bangkok, 2001, pp. 170-226.

## Tool 12. Key international labour standards for gender equality in brief

### 12.1 About this tool<sup>29</sup>

This tool explains main international labour standards which are vital for equality promotion in societies. These include the fundamental principles and rights at work, defined by ILO member States in 1998 and four key ILO standards for gender equality promotion: the Equal Remuneration Convention, 1951 (No. 100), the Discrimination (Employment and Occupation) Convention, 1958 (No. 111), the Workers with Family Responsibilities Convention, 1981 (No. 156), and the Maternity Protection Convention, 2000 (No. 183).



**Aims:** To increase understanding about key international labour standards on gender equality promotion and promote their inclusion in national law and workplace practices



**Users:** ILO partner organizations and ILO managers, technical specialists, advisers and experts, programme officers, project managers and staff

### 12.2 Fundamental principles and rights at work

In order to enable ILO member States to cope with the competitive pressures of global economic integration and ensure that the principles underlying these standards as laid down in the ILO Constitution are recognized, respected and realized everywhere, governments, employers' and workers' organizations adopted a Declaration on Fundamental Principles and Rights at Work and its Follow-up in 1998.

These principles and rights are universal and *apply to all human beings in all countries* and must be respected even in countries whose governments have not ratified the Conventions concerned. The fundamental principles and rights at work cover four areas and concern eight ILO Conventions as shown below.

| Box 12.2.1 Fundamental principles and rights at work and concerned Conventions |  |
|--|--|
| <b>Freedom of association and the right to bargain collectively</b>            | <ul style="list-style-type: none"><li>• Freedom of Association and Protection of the Right to Organize Convention, 1948 (No. 87)</li><li>• Right to Organize and Collective Bargaining Convention, 1949 (No. 98)</li></ul> |
| <b>Elimination of all forms of forced or compulsory labour</b>                 | <ul style="list-style-type: none"><li>• Forced Labour Convention, 1930 (No. 29)</li><li>• Abolition of Forced Labour Convention, 1957 (No. 105)</li></ul>  |

<sup>29</sup> Sources: ILO: *Recovering from the crisis: A global jobs pact*, Provisional record 19A, International Labour Conference, 98<sup>th</sup> Session, Geneva, 2009; ILO: *Resolution concerning Gender Equality at the Heart of Decent Work*, Provisional record 19, International Labour Conference, 98<sup>th</sup> Session, Geneva, 2009; ILO: *ILO Declaration on Social Justice for a Fair Globalization*, International Labour Conference, 97<sup>th</sup> Session, Geneva, June 2008; ILO, *International labour standards on migrant workers rights: Guide for policymakers and practitioners in Asia and the Pacific* (Bangkok, 2007); and ILO: *ABC of women workers' rights and gender equality*, 2<sup>nd</sup> ed. (Geneva, 2007).

|   |  |
|---|--|
| <b>Effective abolition of child labour</b>                        | <ul style="list-style-type: none"> <li>• Minimum Age Convention, 1973 (No. 138)</li> <li>• Worst Forms of Child Labour Convention, 1999 (No. 182)</li> </ul>                       |
| <b>Elimination of discrimination in employment and occupation</b> | <ul style="list-style-type: none"> <li>• Equal Remuneration Convention, 1951 (No. 100)</li> <li>• Discrimination (Employment and Occupation) Convention, 1958 (No. 111)</li> </ul> |

Respect for these fundamental principles and rights at work is critical for human dignity and economic development, and in times of crisis they serve to prevent a downward spiral in labour conditions and build sustainable economies. This message was reinforced in 2008 when ILO constituents adopted the Declaration on Social Justice for a Fair Globalization and in 2009 when the ILO member States adopted a Global Jobs Pact to guide national and international policies to create jobs, protect workers and stimulate economic recovery.

### 12.3 Key international labour standards on gender equality at work

The roles of men and women are constantly evolving and perceptions of the ‘traditional’ share of paid labour and unpaid family or care work are still undergoing profound changes. In order to shape **a more equal and equitable future for women and men at work**, four key gender equality Conventions cover equal remuneration, non-discrimination in employment and occupation, workers with family responsibilities and maternity protection. Two of these are included among the fundamental principles and rights at work.

#### Box 12.3.1 What are the key ILO instruments for achieving gender equality at work?

Four ILO Conventions have been adopted by ILO member States as key instruments for achieving gender equality in the world of work, and four twin Recommendations provide guidance for in-country action.

**Equal Remuneration Convention, 1951 (No. 100)**, and Recommendation No. 90

**Aim**

To ensure and promote equal remuneration for women and men for work of equal value

**Scope of remuneration**

All wages, emoluments and benefits arising out of a worker’s employment

- whether paid in cash or in kind
- whether paid directly or indirectly

Examples:

- Overtime bonuses, grants
- Transport payments, business expenses
- Family benefits
- Payments to joint insurance schemes

**Implementation measures**

- ✓ Review means of wage setting to eliminate any direct differential between men’s and women’s pay
- ✓ Review laws and practices that indirectly determine wage or benefit amounts
- ✓ Promote the use of job evaluations based on analytical methodology
- ✓ Revise pay schedules to eliminate differentials that are not based on job content, or seniority, or are not productivity linked
- ✓ Set up pay equity councils
- ✓ Collect and analyze statistics disaggregated by sex (on earning levels and hours of work, occupational groupings, level of education, age, seniority, hours actually worked, etc.)
- ✓ Include a provision of equal pay in legislation, collective agreements and wage directives
- ✓ Review suspect differential pay categories between jobs done by mostly men and jobs done by mostly women (e.g. light work and heavy work)

*continued on page 81*

**Box 12.3.1... from page 80**

**Discrimination (Employment and Occupation) Convention, 1958 (No. 111), and Recommendation No. 111**

**Aim**

To promote equality of opportunity and treatment in the workplace and eliminate discrimination in the world of work

**Scope**

- Access to vocational training, credit and jobs, employment and working conditions, such as job security, equal pay, social security and other benefits linked to employment
- All employment stages: preparation, entry, work and exit
- All employed and self-employed workers, including own-account workers, enterprise owners and contributing family members

**What is discrimination?**

Any distinction, exclusion, or preference that:

- results in unequal treatment or a denied job opportunity
- is based on a number of grounds bearing little or no relation to potential or performance (race, colour, sex, religion, political opinion, social origin or national extraction)

**What is *not* discrimination?**

- Distinction based on *inherent requirements of a job* (e.g. language or religious requirements)
- *Special measures* to protect the reproductive functions of men and women and maternal health
- *Positive action* – temporary measures to redress the effects of past or continuing discrimination

**Implementation measures**

- ✓ Cooperation with employers' and workers' organizations
- ✓ Enact or modify legislation
- ✓ Promote educational programmes
- ✓ Implement public policies on employment and vocational training

**Workers with Family Responsibilities Convention, 1981 (No. 156), and Recommendation No. 165**

**Aim**

To establish equality of opportunity and treatment between:

- men and women workers with family responsibilities
- workers with and without family responsibilities

**Scope**

- All sectors of economic activity and all categories of workers
- All men and women workers with family responsibilities for dependent children or any other member of the immediate family who clearly need care and support

**Application at national policy level**

With a view to creating effective equality of opportunity and treatment, make it an aim of national policy to enable workers with family responsibilities to engage in employment **without discrimination** and, to the extent possible, without conflict between their work and family responsibilities.

**Measures to promote work-family reconciliation**

- ✓ **Family services** (child care, elder care, services to reduce domestic tasks)
- ✓ **Leave** (maternity leave, paternity leave, parental leave, emergency family leave retraining/reintegration)
- ✓ **Working time** (duration, part-time, flexible working time)
- ✓ **Raising awareness** about balancing work and family responsibilities

*continued on page 82*

**Box 12.3.1... from page 81**

**Maternity Protection Convention, 2000 (No. 183), and Recommendation No. 191**

**Aim**

To provide maternity protection for women at work

**Scope**

All employed women, including those in atypical forms of dependent work

**What is maternity protection?**

- ✓ **Maternity leave** (14 weeks; 6 weeks compulsory postnatal leave unless otherwise agreed at the national level; additional leave in case of illness or complications)
- ✓ **Cash & medical benefits** (at least 2/3 of a woman's insured earnings or comparable coverage; prenatal, childbirth, postnatal medical care; necessary hospitalization)
- ✓ **Health protection** (woman not obliged to perform work hazardous to her health or that of her child)
- ✓ **Employment security** (protection from dismissal; right to return to the same or equivalent job at equal pay)
- ✓ **Non-discrimination** (maternity not a source of discrimination in employment; no pregnancy testing unless legally prescribed to protect health)
- ✓ **Breastfeeding** (periodic breaks or a reduction of work hours to breastfeed – nursing breaks/ hours counted as working time and remunerated)

---

Sources: Presentations by Constance Thomas, "Gender Equality at Work – Conventions Nos. 100 & 111," Bangkok and Beijing; Tim de Meyer, "Promoting Equality of Opportunity and Treatment at Work (and Eliminating Discrimination)," SRO-Bangkok, 22 August 2007; Martin Oelz, "The Workers with Family Responsibility Convention, 1981 (No. 156): Issues and Trends Emerging from the Supervisory Process," NORMES (Equality Team), 11 September 2007 & Social Protection Sector – Conditions of Work and Employment Programme (TRAVAIL).

A list of international labour standards of specific relevance to gender equality promotion is given in Annex 2.



## Annex 1 Glossary

### **Affirmative action or positive measures**

Special – usually temporary – measures to redress the effects of past or continuing discrimination in order to establish equality of opportunity and treatment between population groups in society in actual practice.

### **Decent work**

Productive work performed in conditions of freedom, equity, security and human dignity, to which women and men have access on equal terms.

### **Discrimination, see also sex discrimination**

Defined in the Discrimination (Employment and Occupation) Convention, 1958 (No. 111), as *any distinction, exclusion or preference based on race, colour, sex, religion, political opinion, national extraction or social origin which nullifies or impairs equality of opportunity or treatment in employment or occupation* (Art. 1 (1a)).

### **Equality at work**

A fundamental value and principle enabling workers to claim a fair share of the wealth which they help generate. Everybody needs to be given freedom to reach their full potential in life and in work.

### **Equal opportunity in the world of work**

The principle of equal opportunity aims to ensure that people can develop their potential to the fullest, and can allocate their time and energy where reward is the highest. Equal opportunity between men and women at work refers to equal chances to apply for a particular job to be employed, to attend educational or training courses, to be eligible to attain certain qualifications and to be considered as a worker or for a promotion in all occupations or positions, including those dominated by one sex or the other.

### **Equal treatment in the world of work**

The principle of equal treatment intends to ensure that people's work performance is rewarded according to their productivity and merit, taking into account the objective characteristics and occupational requirements of a job, such as skills, efforts, responsibilities and working conditions, and without interference of considerations unrelated to merit. It refers to equal entitlements in pay, working conditions, security of employment, reconciliation between work and family life, and social protection.

### **Equal remuneration:**

- **Equal pay for equal work**

The same pay for performing the same, identical or similar work. Equal pay for equal work is more limited in scope than 'equal pay for work of equal value'.

- **Equal pay for work of equal value**

The principle of equal pay for work of equal value applies when men and women perform work that is different in content but equal in terms of skill and qualifications, efforts, duties and responsibilities, and working conditions.

### **Evaluation**

Review of the effects and the impact of a programme or project's objectives, outcomes, outputs and activities, assessing the actions or reactions of those affected at one point in time either during implementation (interim and final evaluations) or after the completion of activities (ex-post evaluations).

### **Femininity and masculinity**

Ideas and expectations about the characteristics, abilities and likely behaviour of women and men.

## **Gender**

Social differences and relations between men and women that are learned, vary widely among societies and cultures, and change over time. The term 'gender' does not replace the term 'sex', which refers exclusively to biological differences between men and women, for example, statistical data are broken down by sex. The term 'gender' is used to analyze the roles, responsibilities, constraints, opportunities and needs of women and men in all areas and in any given social context.

## **Gender analysis**

Research examining similarities, differences and relations between women and men, and girls and boys in all spheres of life and work. It looks at their specific activities, the division of labour, access to and control over resources, as well as their needs, constraints and opportunities as well as access to development benefits and decision making at the micro level of the individual, the family and the workplace, the meso or institutional level and the macro level or the larger natural, social, economic and political environment with a view to identify possible gender gaps and means of rectifying these.

## **Gender-blind, *see also* gender neutral**

Describes measures and actions, such as research, analysis, policies, advocacy and training materials, project and programme design and implementation that do not recognize and ignore possible differences between the position, needs, constraints, opportunities and interests of women, men, girls and boys.

## **Gender budgeting**

Application of gender mainstreaming in the budgetary process and incorporating a gender perspective at all levels of the budgetary process to promote gender equality by measuring where spending goes and revenue comes from, and who pays and who benefits. If inequalities are found it may involve re-allocation of revenues and expenditures and restructuring of the budget process to ensure fair and equitable distribution of benefits.

## **Gender dimension, *see* gender gap**

## **Gender equality *or* equality between men and women**

Enjoyment of equal rights, opportunities and treatment by men and women of all ages in all spheres of life and work. It implies that all human beings are free to develop their personal abilities and make choices without the limitations set by stereotypes and prejudices about gender roles or the characteristics of men and women. It means that the different behaviour, aspirations and needs of women and men are considered, valued and favored equally. It does not mean that women and men are the same or have to become the same, but that their rights, responsibilities, social status and access to resources do not depend on whether they are born male or female.

## **Gender equity**

Equality of outcomes and results, i.e. women and men, girls and boys have an equal chance not only at the starting point but also when reaching the finishing line. Gender equity is about fair and just treatment of both sexes that takes into account and addresses the different needs and interests of men and women, cultural barriers and (past) discrimination of specific groups.

## **Gender gap *or* gender imbalance**

Differences in any area between women and men (or girls and boys) in terms of their levels of participation, access to resources, rights, power and influence, remuneration and benefits.

## **Gender justice**

Aims at the ending of, and the provision of redress for, inequalities between women and men that result in the subordination of women to men. The gender justice approach pursues gender equality with an emphasis on transforming unequal power relations between the sexes. Priorities include advancing women's rights and access to resources on an equal footing with men; building women's voice and 'agency' – ability to make choices; creating women's access and influence in policy and decision making institutions and making social, economic and political institutions responsive and accountable to women. The term 'gender justice' is increasingly being used because of the growing concern and realization that terms like 'gender equality' and 'gender mainstreaming' have failed to communicate, or provide redress for, the ongoing gender injustices from which mostly women suffer.

**Gender mainstreaming**

Main strategy to accelerate progress toward equality between women and men. A two-pronged approach is applied: firstly, through explicitly and systematically addressing the specific and often different needs and concerns of both women and men in all policies, strategies and programmes; secondly, through targeted interventions when analysis shows that one sex – usually women – is socially, politically and/or economically disadvantaged. Empowerment initiatives, such as affirmative action measures, are essential to achieve equality and are an integral component of the gender mainstreaming strategy.

**Gender-neutral, see also gender blind**

Describes measures and actions, such as research, analysis, policies, advocacy and training materials, project and programme design and implementation that are not affected by and do not affect the different situations, roles, needs, and interests of women, men, girls and boys. In reality, very few policies, measures and actions are gender-neutral, because they have different effects on women and men.

**Gender-responsive or gender-sensitive**

Refers to measures and actions that address the different situations, roles, needs and interests of women, men, girls and boys with a view to close gender gaps and achieve equality.

**Gender roles**

Activities that men and women actually do. Gender roles can be flexible or rigid. They vary according to individual characteristics of people and change over time. For example, in many traditional societies the roles of men and women are segregated by sex with men working outside the house and women responsible for family and household duties at home. In other societies the roles of men and women are increasingly interchangeable with men sharing household work and more women as main income earners in the family.

**Gender stereotypes**

Ideas that people have on what boys and men, girls and women are capable of doing, for example, women are better housekeepers and men are better leaders. While stereotypes may sometimes be true, they are often proven false.

**Gender values and norms (on masculinity and femininity in society)**

Ideas that people have on what men and women of all generations should be like. For example, in many societies women should be feminine: beautiful, obedient and good housewives. Men, on the other hand, are expected to be masculine: strong, brave and leaders of the family and community.

**Human rights**

Basic and absolute rights agreed and defined at the international level that each person has because he or she is a human being.

**Indicator**

A quantitative or qualitative measurement of performance

**Logical framework**

Planning tool to improve the design, implementation and evaluation of a development programme or project which emphasizes the interrelationships and causal links between main programme or project components, such as identifying a problem, defining a strategy, objectives, outcomes and indicators, describing key outputs and activities, assessing risks or external factors and establishing preconditions for success.

**Monitoring**

Takes place regularly during the implementation of a programme or project and reviews the process of transforming inputs into outputs through activities. Monitoring is concerned with the delivery process throughout a period of time, assessing the quantity and quality of project outputs and activities.

## **Objective or Outcome**

- **Development objective**

Expected contribution of a programme or project to wider positive economic or social changes.

- **Immediate objective or outcome**

Significant change in terms of policies, capacities, knowledge, skills, behaviours, measures or practices, etc., that is intended to occur as a result of a programme or project.

## **Output**

Results or products in terms of valuable resources, goods or services produced by a policy, programme or project and delivered to beneficiaries.

## **Practical needs, see also strategic needs**

Basic needs or survival needs, e.g. food, water, shelter, income, clothing and healthcare. Practical needs relate to inadequacies in living and working conditions of men and women. Practical and strategic needs should be met simultaneously to achieve equality in practice. Projects that target practical needs only will not lead to long lasting benefits and will only be sustainable when strategic needs are also addressed.

## **Programme**

Coherent framework of action to achieve development objectives, consisting of separate sets of activities (grouped under different components) that are oriented towards the attainment of specific immediate objectives/outcomes within a given time period; consists of interventions on a larger scale than a project and usually includes several projects whose specific objectives are linked to the achievement of higher-level common objectives.

## **Programming cycle**

Comprises several phases of a programme or project that interact with one another. The main phases are:

- planning (project identification)
- formulation and design
- implementation and monitoring
- evaluation.

## **Project**

Planned undertaking of interrelated and coordinated activities designed to achieve certain specific objectives within a given budget and period of time. A project is usually part of a broader undertaking such as a development programme, to which it will only make a contribution.

## **Sex discrimination or gender discrimination**

Any distinction, exclusion or preference based on sex or gender values, norms or stereotypes, which has the effect of nullifying or impairing equality of opportunity and treatment in life and at work.

## **Strategic needs, see also practical needs**

Needs for equality and empowerment of women, men, boys and girls, such as, equal access to education, training and jobs, equal rights to land and property, fair sharing of family responsibilities and decision making, equal representation in governance and equal pay for work of equal value. Strategic needs can not be met without also meeting people's practical needs, but projects that target practical needs only and do not redress inequalities in power relations between men and women will not lead to long lasting benefits. Gender equality can only be achieved in a sustainable manner when both practical and strategic needs are addressed.

## Annex 2 ILO standards of specific relevance to gender equality

### Fundamental principles and rights at work

- **Equal Remuneration** Convention, 1951 (No. 100) and Recommendation No. 90
- **Discrimination in Respect of Employment and Occupation** Convention, 1958 (No. 111) and Recommendation No. 111
- **Freedom of Association and Protection of the Right to Organise** Convention, 1948 (No. 87)
- **Right to Organise and Collective Bargaining** Convention, 1949 (No. 98)
- **Forced Labour** Convention, 1930 (No. 29) and Recommendation No. 35
- **Abolition of Forced Labour** Convention, 1957 (No. 105)
- **Minimum Age for Admission to Employment** Convention, 1973 (No. 138) and Recommendation No. 146
- **Elimination of the Worst Forms of Child Labour** Convention, 1999 (No. 182) and Recommendation No. 190

### Governance

- **Labour Inspection** Convention, 1947 (No. 81) and Recommendation No. 81
- **Labour Inspection (Agriculture)** Convention, 1969 (No. 129) and Recommendation No. 133
- **Tripartite Consultation (International Labour Standards)** Convention, 1976. (No. 144) and Tripartite Consultation (Activities of the ILO) Recommendation, 1976 (No. 152)
- **Employment Policy** Convention, 1964 (No. 122) and Recommendation No. 122; Employment Policy (Supplementary Provisions) Recommendation, 1984 (No. 169)

### Employment and Human Resources Development

- **Human Resources Development** Convention, 1975 (No. 142), and Human Resources Development Recommendation, 2004 (No. 195)
- **Termination of Employment** Convention, 1982 (No. 158) and Recommendation No. 166
- **Promotion of Cooperatives** Recommendation, 2002 (No. 193)
- **Employment Relationship** Recommendation, 2006 (No. 198)

### Social protection

- **Night Work (Women)** Convention (Revised), 1948 (No. 89) and Protocol of 1990 to the Night Work (Women) Convention (Revised) (No. 89); Night Work Convention, 1990 (No. 171) and Recommendation No. 178
- **Protection of Wages** Convention, 1949 (No. 95) and Recommendation No. 85; **Minimum Wage Fixing** Convention, 1970 (No. 131) and Recommendation No. 135
- **Social Security (Minimum Standards)** Convention, 1952 (No. 102)
- **Maternity Protection** Convention (Revised), 1952 (No. 103), and Recommendation No. 95, and Maternity Protection Convention, 2000 (No. 183), and Recommendation No. 191
- **Reduction of Hours of Work** Recommendation, 1962 (No. 116)
- **Workers with Family Responsibilities** Convention, 1981 (No. 156), and Recommendation No. 165
- **Occupational Safety and Health** Convention, 1981 (No. 155) and Recommendation No. 164; Protocol of 2002 to the Occupational Safety and Health Convention (No. 155)
- **Chemicals** Convention, 1990 (No. 170), and Recommendation No. 177
- **Part-Time Work** Convention, 1994 (No. 175), and Recommendation No. 182
- **Home Work** Convention, 1996 (No. 177), and Recommendation No. 184
- **Safety and Health in Agriculture** Convention, 2001 (No. 184), and Recommendation No. 192

### Specific groups of workers or specific sectors

- **Migration for Employment** Convention (Revised), 1949 (No. 97), and Recommendation No. 86
- **Migrant Workers** (Supplementary Provisions) Conventions, 1975 (No. 143), and Recommendation No. 151
- **Plantations** Convention, 1958 (No. 110), and Protocol of 1982 to the Plantations Convention (No. 110)
- **Nursing Personnel** Recommendation, 1977 (No. 157)
- **Indigenous and Tribal Peoples** Convention, 1989 (No. 169)

# Gender mainstreaming strategies in decent work promotion: Programming tools

## GEMS TOOLKIT

Equality empowers women and men: It is the right and the smart thing to do. The GEMS Toolkit is a set of 12 practical tools to facilitate the implementation of Gender Mainstreaming Strategies (GEMS) in organizations, policies, programmes and projects. The tools are provided in the form of quick reference guides, checklists and tips for easy use. The first tool explains key concepts and strategies for gender equality in decent work promotion. The other tools are about GEMS in Decent Work Country Programmes, in organizations, research, the design, implementation, monitoring and evaluation of programmes and projects, in budgeting, human resource development, media products and processes, meetings and training and in the working environment. The final tool summarizes four main international labour standards for gender equality.



Contact information:

### International Labour Organization

Regional Office for Asia and the Pacific

11<sup>th</sup> Floor, United Nations Building, Rajdamnern Nok Avenue, P.O. Box 2-349, Bangkok 10200, Thailand

Tel: +662 288 1234, Fax: +662 288 3062, Email: [libroap@ilo.org](mailto:libroap@ilo.org) or [BANGKOK@ilo.org](mailto:BANGKOK@ilo.org)

Url: [www.ilo.org/asia/whatwedo/publications/](http://www.ilo.org/asia/whatwedo/publications/) (See Equality and discrimination under Area of work)

**DECENT WORK**

A better world starts here.

ISBN: 9789221238690