

ANNEX 6: CONCEPTUAL FRAMEWORKS FOR GENDER ANALYSIS AND PLANNING

SUMMARY OF THE FRAMEWORKS: 1

- The Harvard Analytical Framework;
- The Moser Framework; and
- The Women’s Empowerment Framework.

THE HARVARD ANALYTICAL FRAMEWORK sets out to: 1) make an economic case for allocating resources to women as well as men; and 2) assist planners to design more efficient projects. It is most useful for projects that are agricultural or rural based, and/or that are adopting a sustainable livelihood approach to poverty reduction. It is also useful to explore the twin facts of productive and reproductive work, especially with groups that have limited experience of analyzing differences between men and women. The framework is designed as a grid for collecting data at the micro-level.

THE MOSER FRAMEWORK (gender planning) was developed as a planning tradition in its own right. It takes the view that gender planning, unlike other mainstream planning, is “both technical and political in nature” (adapted from: March, C., I. Smyth and M. Mukhopadhyay, A Guide to Gender-Analysis Frameworks, Oxfam, Oxford, 1999). It assumes conflict in the process. It involves transformative processes and characterizes planning as a “debate.” There are six tools in the framework that can be used for planning at all levels from project to regional planning.

THE WOMEN’S EMPOWERMENT FRAMEWORK aims to assist planners as well as question what women’s equality and empowerment means in practice and to what extent a development intervention supports empowerment. Women’s empowerment is defined as “enabling women to take an equal place with men, and to participate equally with men in the development processes in order to achieve control over the factors of production on an equal basis with men.”

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1 UNDP Learning and Information Pack
A. **Harvard Analytical Framework**

The Harvard Analytical Framework is also called the *Gender Roles Framework* or *Gender Analysis Framework*. Developed by the Harvard Institute for International development in collaboration with the WID Office of USAID, and based on the WID efficiency approach, it is one of the earliest gender analysis and planning frameworks. The Harvard Framework is originally outlined in Overholt, Anderson, Cloud and Austin, *Gender Roles in Development Projects: A Case Book*, Kumarian Press: Connecticut, 1984.

**Aims of the Harvard Framework:**
- To demonstrate that there is an economic rationale for investing in women as well as men.
- To assist planners in designing more efficient projects and improve overall productivity.
- To emphasize the importance of better information as the basis for meeting the efficiency/equity goal.
- To map the work of men and women in the community and highlight the key differences.

**Features:**

The framework consists of a matrix for collecting data at the micro- (community and household) level. It has four inter-related components:

- The **activity profile**, which answers the question “who does what?”, including gender, age, time spent and location of the activity;
- The **access and control profile**, which identifies the resources used to carry out the work identified in the activity profile, and access to and control over their use, by gender;
- The **analysis of influencing factors**, which charts factors that influence gender differences in the above two profiles;
- The **project cycle analysis**, which examines a project or intervention in light of gender-disaggregated information.

The framework also contains a series of checklists consisting of key questions to ask at each stage of the project cycle: identification, design, implementation and evaluation.

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CHECKLIST 1: Women’s dimension in project identification

Assessing women’s needs:
✓ What needs and opportunities exist for increasing women’s productivity and/or production?
✓ What needs and opportunities exist for increasing women’s access to and control of resources?
✓ What needs and opportunities exist for increasing women’s access to and control of benefits?
✓ How do these needs and opportunities relate to the country’s other general and sectoral development needs and opportunities?
✓ Have women been directly consulted in identifying such needs and opportunities?

Defining general project objectives:
✓ Are project objectives explicitly related to women’s needs?
✓ Do these objectives adequately reflect women’s needs?
✓ Have women participated in setting those objectives?
✓ Have there been any earlier efforts?
✓ How has the present proposal built on earlier activity?

Identifying possible negative effects:
✓ Might the project reduce women’s access to or control of resources and benefits?
✓ Might it adversely affect women’s situation in some other way?
✓ What will be the effects on women in the short and longer term?

CHECKLIST 2: Women’s dimension in project design

Project impact on women’s activities:
✓ Which of these activities (productive, reproductive, socio-political) does the project affect?
✓ Is the planned component consistent with the current gender denomination for the activity?
✓ If it is planned to change the women’s performance of that activity, i.e., locus of activity, remunerative mode, technology, mode of activity) is this feasible, and what positive or negative effects would there be on women?
✓ If it does not change, is this a missed opportunity for women’s roles in the development process?
✓ How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones?

Project impact on women’s access and control:
✓ How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from the production of goods and services?
✓ How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from the reproduction and maintenance of the human resources?
✓ How will each of the project components affect women’s access to and control of the resources and benefits engaged in and stemming from the socio-political functions?
✓ What forces have been set in motion to induce further exploration of constraints and possible improvements?
✓ How can the project design be adjusted to increase women’s access to and control of resources and benefits?

CHECKLIST 3: Women’s dimension in project implementation

**Personnel:**
✓ Are project personnel aware of and sympathetic to women’s needs?
✓ Are women used to delivering the goods and services to women beneficiaries?
✓ Do personnel have the necessary skills to provide any special inputs required by women?
✓ What training techniques will be used to develop delivery systems?
✓ Are there appropriate opportunities for women to participate in project management positions?

**Organizational structures:**
✓ Does the organizational structure enhance women’s access to resources?
✓ Does the organization have adequate power to obtain resources needed by women from other organizations?
✓ Does the organization have the institutional capability to support and protect women during the change process?

**Operations and logistics:**
✓ Are the organization’s delivery channels accessible to women in terms of personnel, location and timing?
✓ Do control procedures exist to ensure dependable delivery of the goods and services?
✓ Are there mechanisms to ensure that the project resources or benefits are not usurped by males?

**Finances:**
✓ Do funding mechanisms exist to ensure program continuity?
✓ Are funding levels adequate for proposed tasks?
✓ Is preferential access to resources by males avoided?
✓ Is it possible to trace funds for women from allocation to delivery with a fair deal of accuracy?
Flexibility:
✓ Does the project have a management information system which will allow it to detect the effects of the operation on women?
✓ Does the organization have enough flexibility to adapt its structures and operations to meet the changing or new-found situations of women?

CHECKLIST 4: Women’s dimension in project evaluation

Data requirements:
✓ Does the project’s monitoring and evaluation system explicitly measure the project’s effects on women?
✓ Does it also collect data to update the Activity Analysis and the Women’s Access and Control Analysis?
✓ Are women involved in designing the data requirements?

Data collection and analysis:
✓ Are the data collected with sufficient frequency so that necessary project adjustments could be made during the project?
✓ Are the data fed back to project personnel and beneficiaries in an understandable form and on a timely basis to allow project adjustments?
✓ Are women involved in the collection and interpretation of data?
✓ Are data analyzed so as to provide guidance to the design of other projects?
✓ Are key areas of WID research identified?

Uses of the Framework:
✓ Best suited for project planning, rather than program or policy planning;
✓ As a gender-neutral entry point when raising gender issues with constituents resistant to considering gender relations and power dynamics;
✓ For baseline data collection;
✓ In conjunction with Moser’s framework, to draw in the idea of strategic gender needs.

Strengths of the Harvard Framework:
✓ It is practical and hands-on.
✓ Once the data have been collected, it gives a clear picture of who does what, when and with what resources. It makes women’s roles and work visible.
✓ It distinguishes between access to and control over resources.
✓ It can be easily adapted to a variety of settings and situations.
✓ It is relatively non-threatening, because it relies on “facts” only.

Potential limitations:
✓ Based on WID rationale, which aims at increasing project/program efficiency.
✓ It does not delineate power relations or decision-making processes. Therefore, the framework offers little guidance on how to change existing gender inequalities.
It tends to result in gender-neutral or gender-specific interventions, rather than those that can transform existing gender relations.

Tends to oversimplify, based on a somewhat superficial, “tick-the-boxes” approach to data collection, ignoring complexities in the community; may result in lost opportunities for change.

Is basically a top-down planning tool, excluding women’s and men’s own analysis of their situation.

Ignores other underlying inequalities, such as class, race and ethnicity, encouraging an erroneous view of men and women as homogeneous categories.

Emphasizes separation of activities and resources based on sex or age, ignoring connections and cooperative relations across these categories. This can result in projects that may have unintended consequences or cannot tackle women’s strategic gender needs.

The profiles yield a somewhat static view of the community, without reference to changes over time in gender relations.

B. Moser’s Gender Planning Framework

Features:
One of the most popularly used frameworks is that developed by Caroline Moser. It is based on her concepts of gender roles and gender needs, and policy approaches to gender and development planning. Other sections in this module discuss the concepts of gender roles and gender needs, and contain exercises which clarify an understanding of these concepts.

Moser categorizes the main policy approaches to women and development as follows:

Policy approaches to low-income Third World women have shifted over the past decade, mirroring shifts in macro-economic development policies. Five different policy approaches can be identified, each categorized in terms of the roles of women on which they focus and the practical and strategic needs they meet.

- **Welfare**: Earliest approach, 1950-70. Its purpose is to bring women into development as better mothers. Women are seen as passive beneficiaries of development. It recognizes the reproductive role of women and seeks to meet practical gender needs (PGNs) associated with that role through top-down handouts of food aid and measures against malnutrition and family planning. It is non-challenging and, therefore, still widely popular.

- **Equity**: The original WID approach, used in the 1976-85 UN Women’s Decade, its purpose is to gain equity for women, who are seen as active participants in development. It recognizes women’s triple role (productive, reproductive and community-based) and seeks to meet strategic gender needs (SGNs) through direct state intervention giving political and economic autonomy, and reducing inequality with men. It challenges women’s subordinate position. Criticized as Western feminism, equity is considered threatening, and is unpopular with governments.
• **Anti-poverty**: The second WID approach, a toned-down version of equity, adopted from the 1970s onward. Its purpose is to ensure that poor women increase their productivity. Women’s poverty is seen as a problem of underdevelopment, not of subordination. It recognizes the productive role of women, and seeks to meet the PGN to earn an income, particularly in small-scale income-generating projects. It is most popular with NGOs.

• **Efficiency**: The third, and now predominant, WID approach, adopted particularly since the 1980s debt crisis. Its purpose is to ensure that development is more efficient and effective through women’s economic contribution, with participation often equated with equity. It seeks to meet PGNs while relying on all three roles and an elastic concept of women’s time. Women are seen entirely in terms of their capacity to compensate for declining social services by extending their working day, a very popular approach.

• **Empowerment**: The most recent approach, articulated by Third World women. Its purpose is to empower women through greater self-reliance. Women’s subordination is experienced not only because of male oppression but also because of colonial and neo-colonial oppression. It recognizes the triple role and seeks to meet SGNs indirectly through bottom-up mobilization of PGNs. Empowerment is potentially challenging, although its avoidance of Western feminism makes it unpopular except with Third World women’s NGOs.

**Uses of the framework:**
- For planning at all levels from policies to projects;
- In conjunction with Harvard framework

**Strengths of Moser’s framework:**
- Moves beyond technical elements of planning, recognizing its political elements and assuming conflict of interests in the planning process. Recognizes the transformative potential of gender planning;
- Conceptualizes planning as aiming to challenge unequal gender relations and support women’s empowerment;
- Makes all work visible and valuable to planners through the concept of triple roles;
- Distinguishes between types of gender needs: those that relate to women’s daily lives but maintain existing gender relations (practical gender needs) and those that potentially transform existing gender subordination (strategic gender needs);
- Categorizes policy approaches.
Potential limitations:
- The idea of gender roles obscures the notion of gender relationships and can give the false impression of natural order and equality;
- The framework does not mention other forms of inequality, such as class, race or ethnicity;
- The framework is static and does not examine change over time as a variable;
- The policy approaches should not be seen as mutually exclusive; they may often overlap each other in practice.

C. WOMEN’S EMPOWERMENT FRAMEWORK

This framework was developed by Sara Hlupekile, a gender expert from Lusaka, Zambia.

Aims of the framework:
- To achieve women’s empowerment by enabling women to achieve equal control over the factors of production and participate equally in the development process.

Features:
Longwe argues that poverty arises not from lack of productivity, but from oppression and exploitation. She conceptualizes five progressive levels of equality, arranged in hierarchical order, with each higher level denoting a higher level of empowerment. These are the basis to assess the extent of women’s empowerment in any area of social or economic life. The levels of equality are:

<table>
<thead>
<tr>
<th>Control</th>
<th>Using the participation of women in the decision-making process to achieve balance of control between men and women over the factors of production, without one in a position of dominance.</th>
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<tbody>
<tr>
<td>Participation</td>
<td>Pertains to women’s equal participation in the decision-making process, policy-making, planning and administration. In development projects, it includes involvement in needs assessment, project design, implementation and evaluation.</td>
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<td>Conscientization</td>
<td>Pertains to an understanding of the difference between sex roles and gender roles and the belief that gender relations and the gender division of labor should be fair and agreeable to both sides, and not based on the domination of one over the other.</td>
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Access | Pertains to women’s access to factors of production of three-fourths land, labor, credit, training, marketing facilities, and all publicly available services and benefits three-fourths on an equal basis with men. Equality of access is obtained by securing equality of opportunity through legal reform to remove discriminatory provisions.

Welfare | Pertains to level of material welfare of women, relative to men, with respect to food supply, income and medical care, without reference to whether women are themselves the active creators and producers of their material needs.

Longwe also distinguishes between:

| Women’s issues | Which pertain to equality with men in any social or economic role and involving any of the levels of equality.

| Women’s concerns | Which pertain to women’s traditional and subordinate, sex-stereotyped gender roles.

The women’s empowerment framework identifies three levels of recognition of women’s issues in project design:

| Negative level | Where project objectives are silent about women’s issues. Experience suggests that women are likely to be left worse off by such a project.

| Neutral level | Where the project objectives recognize women’s issues but concern remains neutral or conservative, merely ensuring that women are not left worse off than before.

| Positive level | Where project objectives are positively concerned with women’s issues and with improving the position of women relative to men.

The framework can be used to produce profiles as below:
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<tr>
<th>Levels of Recognition</th>
<th>Negative</th>
<th>Neutral</th>
<th>Positive</th>
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<td>Levels of Equality</td>
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**Women’s Empowerment Framework for a Country Program**

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<th>Welfare</th>
<th>Access</th>
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**Uses of the framework:**
- Particularly useful for groups committed to promoting equality and empowerment through their work.

**Strengths of the framework:**
- Develops the notion of practical and strategic gender needs into a progressive hierarchy.
- Shows that empowerment is an essential element of development and enables assessment of interventions along this criterion.
• Has a strong political perspective, aims to change attitudes.

**Potential limitations:**
• Assumption of levels of equality as strictly hierarchical is questionable.
• Framework is static and takes no account of how situations change over time.
• Examines gender relations from the point of view of equality alone, excludes interrelationship between rights and responsibilities.
• Ignores other forms of inequality.

[Adapted from Training Workshop for Trainers in Women, Gender and Development, June 9-21, 1996, Programme Handbook, Royal Tropical Institute, The Netherlands].

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