



GMRK

*Mainstreaming  
Gender in  
Development  
Planning:  
Framework and  
Guidelines*

Published by the

National Economic and Development Authority

National Commission on the Role of Filipino Women

Canadian International Development Agency

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***Mainstreaming  
Gender in  
Development  
Planning:  
Framework and  
Guidelines***



National Economic  
and Development Authority



National Commission on the  
Role of Filipino Women



Canadian International  
Development Agency

# Message

The National Commission on the Role of Filipino Women (NCRFW), as the national technical resource base on Gender and Development (GAD), functions as a policy coordinator and catalyst for gender mainstreaming. Since gender is a crosscutting concern, gender mainstreaming promotes equal access to opportunities and becomes a collective responsibility of all government agencies. The support of the National Economic and Development Authority (NEDA), as the country's social and economic development planning and policy coordinating body, is most critical in achieving the aim of gender mainstreaming leading to the attainment of gender equality.

While plans are continuously being enhanced to ensure gender mainstreaming, there is still the need to deepen the understanding, awareness and appreciation of development planners on current and emerging gender issues and concerns. This would lead to a more efficient and effective conceptualization and implementation of gender-sensitive programs and projects. Although tools have been developed over the years, applying them to make the actual plans gender-responsive remains a challenging task for all government agencies.

Rising to such a challenge, the NEDA and the NCRFW joined efforts and expertise in putting together this document, "Mainstreaming Gender in Development Planning: Framework and Guidelines" which aims to guide development planners on ways of mainstreaming gender in every phase of the development planning process, namely: (a) identification of issues and challenges, goals and objectives, targets, policies and strategies, programs and projects, implementation mechanism; and (b) monitoring and evaluation. Specifically, it provides guideposts on how gender as a crosscutting concern can be situated in the different sectoral chapters of the Medium-Term Philippine Development Plan (MTPDP).

This framework and its practical guidelines evolved from a series of consultations and workshops conducted among NEDA central and regional personnel and other stakeholders. It spells out the framework and procedures for gender-responsive development planning at the national and local levels.

As a pioneering effort, this Manual is a “work-in-process” as it does not claim to provide all the answers to questions that users might raise in the course of mainstreaming gender in the national development planning process. As a landmark publication, it is our hope that it will help promote the full participation of women in addressing gender inequalities and in bringing about changes in their lives. At the end, women and men must be able to reap the fruits of development equitably.

We are confident that this publication will be useful to the development planners and technical staff of the NEDA and the sectoral agencies in strengthening and sustaining their efforts to mainstream gender concerns in development planning.

We wish to take this opportunity to express our thanks to the Canadian International Development Agency (CIDA) for providing financial assistance to this endeavor and for their dynamic and continuing partnership with the government toward promoting gender and development.



**Dante B. Canlas**  
*Secretary of Socio-Economic  
Planning and Director General  
National Economic  
and Development Authority*



**Aurora Javate-de Dios**  
*Chairperson, National Commission  
on the Role of Filipino Women*

# Message

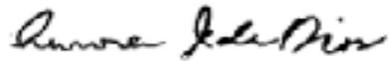
The silver anniversary at the advent of the millennium has been very symbolic for the National Commission on the Role of Filipino Women. It has a grand tradition of leadership as the first national machinery to be set up in Asia in 1975, continually striving to achieve its mission of making government work for women's empowerment and gender equality. It envisions a Philippine society where women and men equally contribute to and benefit from national development.

In this spirited effort, the NCRFW conceptualized the Gender Mainstreaming Resource Kit a year after its 25<sup>th</sup> anniversary. In the conception of the GMRK, the NCRFW brought together the most respected minds in Gender and Development to draft the eight tools in the kit.

Policies are not gender neutral. It affects men and women differently. Thus, the GMRK presents aids and guides to facilitate gender mainstreaming in agencies. With these tools, government agencies, academic and training institutions and civil society will be better equipped to build on their accomplishments. These can also address the gaps and confront the challenges that have faced them in their gender mainstreaming work.

I believe that the Commission is beaming with pride in this contribution. This is a big milestone and I am proud to be part of the experience in laying the foundation for women equality and empowerment. As an active participant in the conceptualization process of this Kit, I have continued to nurture its development. It is a great joy to see how each guidebook, sourcebook and manual in this kit has blossomed to formulate the women's agenda and integrate the Framework plan for Women (FPW). It will be most rewarding to see how each tool will bear fruits of gender-responsive policies and plans, programs and budgets and good governance.

With this, we are optimistic that the government shall realize empowerment and equality for Filipino women. Let us look forward to ensuring that the Gender and Development experience endures for equality and empowerment.



**Amelou Benitez-Reyes, Ph.D**

*NCRFW Commissioner for Culture and Arts, 2002 to present*

*NCRFW Chairperson, 1998 to 2001*

# Message

The Canadian International Development Agency (CIDA) is honored to have been a partner of the Government of the Philippines for many years in promoting Gender Equality. One decade-long of partnership with the National Commission on the Role of Filipino Women (NCRFW) through the Institutional Strengthening Project for Gender Mainstreaming has been highly successful in terms of increasing the capacity of government to implement laws and policies such as the Women in Development and Nation-Building Act (RA 7192). This same partnership has resulted in numerous innovative approaches to gender mainstreaming which have been catalysts for similar efforts in the neighbouring countries of the Asia-Pacific region.

It gives me great pleasure, on behalf of CIDA, to congratulate the NEDA for producing this Manual, which demonstrates another productive collaboration between the NEDA and the NCRFW. I am confident that this publication will prove useful to government planners in providing them with a solid basis for addressing gender concerns in national development process.

As part of the seven tools included in the “Gender Mainstreaming Resource Kit” I am also certain that this Manual will be well-received and used towards a better quality of life for Filipino women through more effective governance that fosters gender equality.

While much has been accomplished, much remains to be done and the challenges are great. Amid these challenges, CIDA remains committed to helping the Philippine Government to integrate gender equality in all of its development efforts.



**Gérard Bélanger**

*Counsellor (Development) and Head of Aid  
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# *Acknowledgements*

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Dr. Alejandro Herrin, Project Consultant, who helped out NEDA in drafting and finalizing this document and served as Resource Person/Facilitator during the Writeshop on selected case studies.

The NEDA Project Advisory Committee headed by former Director General Felipe M. Medalla, former Deputy Director General Ruperto P. Alonzo, and former Assistant Director General Ofelia M. Templo, Social Development Staff Director Erlinda M. Capones and her staff, Marites B. Lagarto, Allan O. Millar and Reina Elena C. Go Tian who provided the overall direction, support and management in the implementation of activities under the NEDA-Institutional Strengthening Project, Phase 2.

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# The GMRK



he **Mainstreaming Gender in Development Planning: Framework and Guidelines** is one of the seven tools chosen for the compendium, Gender Mainstreaming Resource Kit (GMRK). The GMRK is a project initiative of the Institutional Strengthening Project-Phase II (ISP II), collaboration between the Canadian International Development Agency (CIDA) and the National Commission on the Role of Filipino Women (NCRFW). It aims to produce relevant and tested tools that will aid the mainstreaming of gender and development perspectives in development work.

The GMRK is a compendium of tools for gender mainstreaming which can be used by partners and other agencies as a guide in their efforts even beyond the project life. The NCRFW, in consultation with partners and other agencies, went through a thorough process of selecting the tools to be included in the kit. The tool kit therefore includes a range of methods, techniques, know-how, practices and other ways through which gender mainstreaming can be integrated in development efforts. The tool kit is addressed to GAD focal teams, trainers, advocates and champions in various government agencies, academic and training institutions and civil society organizations who engage government institutions in making their operations gender-responsive. This serves as training and reference guide for their various advocacy and training activities and other gender mainstreaming strategies.

Seven (7) tools were chosen for this compendium and are clustered into five (5) categories. The first two (2) categories illustrate the stages of the development planning cycle except for the programming and budgeting and implementation phases. The rest of the categories relate to essential components of the gender mainstreaming strategy which catalyze the integration of gender perspectives in the development planning process.

- The first category is about **Gender-Responsive Planning**. This cluster consists of three titles that tackle mainstreaming gender in the planning process at different levels. The first book is a **“Manual for Mainstreaming Gender in Development Planning: Framework and Guidelines”** that describes how the integration of gender perspectives can enhance macro development planning particularly at the National Economic and Development Authority, the central planning agency of government. It focuses on the application of the tool in reviewing and drafting the Medium Term Philippine Development Plan (MTPDP). It develops a set of guidelines in the analyses, formulation, implementation, monitoring and evaluation of policies, programs and projects to promote gender equality. The second is on **“Gender Responsive Strategic Planning in National Government Agencies”** that tackles how GAD can be woven into the strategic planning process of national government agencies as they translate the MTPDP into their specific agency mandates. The third discusses **“Mainstreaming GAD in Regional and Local Development Planning”** and focuses on GAD mainstreaming cascades at the planning processes of sub-national agencies at the regions and with local government units.
- The second category is in **Gender-Responsive Monitoring and Evaluation** which features the tool, **“A Guide on Gender Mainstreaming: How Far Have We Gone”?** This guidebook aims to track programs and provide GAD practitioners with a holistic view of the gender mainstreaming process. It provides a framework for goals, objectives and strategies for systematic gender mainstreaming; and cases of effective application of strategies at the various stages of gender mainstreaming in national agencies.

- The third category is on **GAD Advocacy and Training** which features **“Transforming Government to Think and Act GAD: A Handbook on Gender and Development Training”**, a tool to help GAD trainers in government agencies formulate their GAD training design and conduct their GAD training sessions. This tool includes as one of its parts, the Gender 101 or GAD Dictionary that defines basic concepts and terms in the source book and in most gender and development literature. It also contains a GAD Planning and Budgeting training module that will orient agencies on the drafting of a GAD plan and the utilization of a GAD budget to ensure that the effects will be most beneficial to women.
- The fourth category is on **Gender-Responsive Organization** with a single volume on **“Ways to Gender-Responsive Organization”**. This guidebook gleans from the experience of agencies that sought to transform themselves into more gender-responsive organizations through a review of their mandate, structure, leadership, culture, resources and other elements.
- The fifth category features **Gender and Statistics** with a solo title on **“Guidebook in Using Statistics for Gender-Responsive Local Development Planning”**. This guidebook clarifies gender statistics amidst other statistics as well as explains the importance and uses of sex-disaggregated data in the various aspects of planning and program development, implementation, monitoring and evaluation. It guides researchers, planners and program implementers to a gender indicator system that will be useful to gender-responsive development planning.

This harvest of materials is a work in progress. It is best to apply them and monitor closely how they work. Further validation in various situations will be most helpful to refine its substance and form.

Feedback and suggestions from readers, GAD advocates and practitioners are most welcome to improve the substance and flow of these materials. Please accomplish the feedback slip inserted in each packet for this purpose.

We hope that these materials will fast track the process of gender mainstreaming in Philippine governance and development. In the end, we hope that these tools will catalyze transformation of individuals and institutions of governance as well as much-awaited improvements in the lives of women and communities.

# *Acronyms*

<b>ARMM</b>	Autonomous Region of Muslim Mindanao
<b>CMTS</b>	Cellular Mobile Telephone Systems
<b>DA</b>	Department of Agriculture
<b>DENR</b>	Department of Environment and Natural Resources
<b>DOH</b>	Department of Health
<b>DOLE</b>	Department of Labor and Employment
<b>FDI</b>	Foreign Direct Investment
<b>FL</b>	Financial Liberalization
<b>FP</b>	Family Planning
<b>FSR</b>	Financial Sector Reform
<b>GASTPE</b>	Government Assistance to Students and Teachers in Private Education
<b>HSRA</b>	Health Sector Reform Agenda
<b>ICPD</b>	International Conference on Population and Development
<b>IGF</b>	International Gateway Facilities
<b>MTPDP</b>	Medium Term Philippine Development Plan
<b>NDHS</b>	National Demographic and Health Survey
<b>NEDA</b>	National Economic and Development Authority
<b>NHIP</b>	National Health Insurance Program
<b>ODA</b>	Official Development Assistance
<b>PPGD</b>	Philippine Plan for Gender-Responsive Development
<b>RH</b>	Reproductive Health
<b>STD</b>	Sexually Transmitted Disease
<b>UN</b>	United Nations
<b>UNICEF</b>	United Nations Children's Fund
<b>WHO</b>	World Health Organization



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## Part 1

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### ***Identifying Gender Issues by Sector***

# Introduction

The purpose of this paper is to develop a set of guidelines for mainstreaming gender in development planning. Operationally, gender mainstreaming in development planning refers to the analyses, formulation, implementation, monitoring, and evaluation of policies, programs and projects, with the objective of promoting equality between women and men.

A number of “guidelines” had been developed in the past.<sup>1</sup> But these guidelines were short on discussions of basic frameworks for analyzing the role of development policies in influencing gender equality, on the one hand, and the role of gender in determining development outcomes such as health, education, employment, etc., on the other. Both types of analysis are needed in development planning. Secondly, said guidelines were not developed with a specific planning document in mind, e.g., the Medium Term Philippine Development Plan (MTPDP). This paper attempts to fill in such gaps.

In preparing this set of guidelines, the author relied on the growing literature on gender and development, more specifically those listed in the references. For a more in-depth understanding of basic concepts and analytical frameworks and greater appreciation of gender and development issues, the reader is encouraged to consult these references.

This paper is in three parts. The first part describes concepts and frameworks. It compares the concept of gender with that of sex. It also discusses the concept of and rationale for mainstreaming, and the gains that could be achieved from using such a strategy.

In this paper, the guidelines are simply a set of basic questions that planners need to consider when formulating a medium-term development plan. These questions include:

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<sup>1</sup> See selected references under “Guidelines for Integrating Gender Concerns in Planning.”

- Assessment of performance: What is the gender impact of past policies and activities?
- Challenges: Is achieving gender equality considered a challenge in the sector? Does responding to this challenge affect other challenges?
- Development goals and objectives: Is gender equality an explicitly stated goal of the sector, and does gender equality affect the achievement of other goals?
- Target setting: Are targets specified, through the use of sex-disaggregated indicators, to allow assessment of whether gender equality is being promoted?
- Policies and strategies: What policies and activities are proposed to address specific gender equality concerns identified in the assessment and expressed as challenges, goals/objectives, and targets? What is the gender impact of policies designed to address macroeconomic or sectoral concerns, and how can favorable gender impacts be enhanced or adverse impacts be avoided or mitigated?
- Legislative agenda: What legislation is needed to promote gender equality based on an assessment of the current situation and a review of existing legislation? What is the gender impact of proposed legislation designed to achieve other objectives?

In the second section of Part I, the paper argues that answering these basic questions (which serve as guidelines for mainstreaming gender in development planning) requires a number of things. These include

- a framework for analyzing the gender impact of policies and programs;
- a framework for analyzing the role of gender in influencing the basic determinants and consequences of such development outcomes as health, education, employment, wage rates, etc.;
- sex-disaggregated data; and
- empirical research on gender impacts and the determinants and consequences of gendered outcomes (i.e., outcomes that are influenced by gender in addition to the commonly known determinants and consequences).

To provide the necessary analytical tools for answering these basic questions, the section presents a framework for analyzing the impact of macroeconomic policies, as well as sector-specific frameworks for analyzing the role of gender in influencing the basic determinants and consequences of such outcomes as health, education, employment, wage rates, and domestic violence.

In Part II, these questions or guidelines are applied to the format in which the MTPDP is typically formulated, that is, in the context of assessing performance, articulating development challenges, translating these into goals and objectives, setting targets, formulating policies and programs, and developing a legislative agenda.

(It may be pointed out that the MTPDP 1999-2004 was used only as reference point and that the arrangement of the basic sectors could vary in subsequent plans.)

Part III presents selected case studies by specialists of the National Economic and Development Authority (NEDA) who applied the frameworks presented in Part I of this manual.

# PART 1

## ***Concepts and Frameworks***

### ***Basic Concepts***

Mainstreaming or integrating gender into development planning requires a uniform understanding of various concepts. These concepts include the concept of gender as compared with sex, and the concept of mainstreaming or integration itself. The rationale for mainstreaming and the gains that could be achieved from such a strategy should also be clearly understood.

#### **1. How does “gender” differ from “sex”?**

- “Sex refers to the genetic/physiological or biological characteristics of a person that indicate whether one is female or male.” (*World Health Organization, 1998:2*).

“Gender refers to socially constructed roles and socially learned behaviors and expectations associated with females and males. Women and men are different biologically - but all cultures interpret and elaborate these innate biological differences into a set of social expectations about what behaviors and activities are appropriate, and what rights, resources, and power they possess.” (*World Bank, 2001:2*)

## **2. What is development, and what does gender have to do with development?**

- Development is the sustained capacity to achieve a better life. For a nation or community, having a better life means that the members have a higher life expectancy and enjoy a higher quality of life. Quality of life involves a) the capacity to do; and b) the capacity to be. Underlying these capacities is the freedom of choice. Hence, development is also about expanding the range of choices for people. (*Sen, 1988*)
- Development is for all, equally for women and men. However, development has a gender dimension that was not recognized until recently. Because men were perceived as dominant in the productive sphere, and because of the secondary importance given to reproductive functions, male needs and concerns became the focus of development initiatives, with the assumption that these concerns apply to all. This so-called gender blindness led to the neglect of concerns particular to women. The neglect is now being redressed through affirmative action in which women are given the advantage so they can catch up in areas where they have fallen behind, and through policy and program formulation that takes into account the specific needs of women and men. These actions are said to be gender-responsive and are aimed at promoting gender equality and eliminating discrimination<sup>2</sup> in development.

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<sup>2</sup> As defined in the Convention for the Elimination of Discrimination Against Women, discrimination is “any distinction, exclusion or restriction made on the basis of sex which has the effect or purpose of impairing or nullifying the recognition, enjoyment or exercise by men and women of human rights and fundamental freedoms in the political, economic, social, cultural, civil or any other field.”

- Gender equality refers to the equality of women and men in
  - ◇ rights: social, economic and legal (e.g., right to own land, manage property, conduct business, travel).
  - ◇ resources: command over productive resources including education, land, information and financial resources.
  - ◇ voice: power to influence resource allocation and investment decisions in the home, in the community, and at the national level. (*World Bank, 2001*)

Using this framework, one can identify a number of gender equality issues by area of concern or across sectors (see *Annex A*).

Gender equality is not the same as equality of outcomes. Equality implies that women and men are free to choose different (or similar) roles and different (or similar) outcomes in accordance with their preferences and goals. (*World Bank, 2001*)

### **3. What is meant by “mainstreaming gender in development planning”? What is the role of government in mainstreaming?**

- Gender mainstreaming starts with the recognition that gender equality is a basic development goal and a key objective of development planning. In gender mainstreaming, what is being brought into the mainstream of development ideas and directions is “the legitimacy of gender equality as a fundamental value that should be reflected in development choices and in institutional practices” (*Schalkwyk, Thomas and Woroniuk, 1996*).
- In development planning, gender mainstreaming refers to the analyses, formulation, implementation, monitoring, and evaluation of policies, programs and projects, with the objective of promoting gender equality.

- Gender mainstreaming requires gender analysis, which is the examination of a) the differences in socially constructed roles and socially learned behaviors and expectations associated with females and males; b) how these differences can lead to inequality in rights, access to resources, and voice; and (c) how, in turn, such inequality affects the quality of life of women and men.

According to the World Health Organization (WHO) (1998), there has been a tendency to equate gender analysis with the “analysis of the situation of women”. It, therefore, emphasizes that the purpose of gender analysis is “to identify, analyze and act upon inequalities that arise from belonging to one sex or the other,” and not just to identify, analyze or act upon problems of women that arise from other kinds of inequalities, such as social class or income.

- The role of government in gender mainstreaming is best described by World Bank (2001) as follows:

“That gender inequalities exact high human costs and constrain countries’ development prospects provides a compelling case for public and private action to promote gender equality. The state has a critical role in improving the well-being of both women and men and, by so doing, in capturing the substantial social benefits associated with improving the absolute and relative status of women and girls. Public action is particularly important since social and legal institutions that perpetuate gender inequalities are extremely difficult, if not impossible, for individuals alone to change.”  
(p.14)

#### **4. What happens when gender concerns are neglected in development planning?**

- Because of lack of attention to gender considerations or what is termed gender blindness<sup>3</sup>, development policies do not

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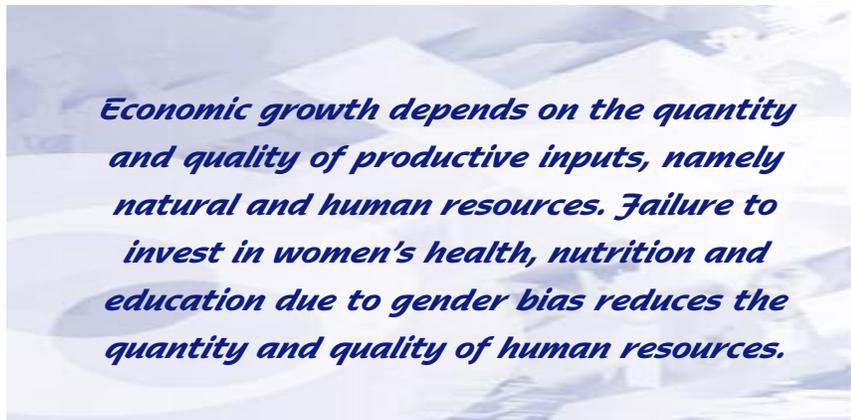
<sup>3</sup> Gender blindness refers to the failure to recognize that gender is an essential determinant of social outcomes, e.g., health (WHO, 1998).

always provide women and men equal opportunity to achieve a better life. By this standard alone, a policy or program may already be considered defective. That such a failure could also reduce the overall efficiency of the economy is another reason for judging the policy/program deficient.

- The impact on economic efficiency may be described as follows. Economic growth depends on the quantity and quality of productive inputs, namely natural and human resources. Failure to invest in women's health, nutrition and education due to gender bias reduces the quantity and quality of human resources, and therefore, the productive capacity of the economy. Moreover, gender bias in occupational choice and employment, by limiting the mobility of labor, results in lower productivity.

## **5. What are practical and strategic gender needs and how do they promote gender equality?**

- In formulating gender-responsive policies and programs, there is a need to address strategic gender needs in addition to meeting practical gender needs.
- Practical gender needs refer to what people need to perform their current roles more easily, effectively and efficiently. Strategic gender needs, on the other hand, refer to what people need to be freed from traditional gender roles and



*Economic growth depends on the quantity and quality of productive inputs, namely natural and human resources. Failure to invest in women's health, nutrition and education due to gender bias reduces the quantity and quality of human resources.*

expectations, and to prepare them for performing varied roles of their choice. (Adopted from Moser, 1989)

- Meeting practical gender needs include, for example, actions to make home production and reproduction more efficient, such as providing a safe water supply system and safe motherhood services, respectively, and actions to increase income opportunities for women as secondary earners using home production skills. These actions would be the same as those actions designed to achieve general development, without reference to gender.
- Examples of actions to meet strategic gender needs are: making the law responsive to women's concerns, re-educating society about the roles assigned to women and men, enhancing women's ability to own and control productive assets, freeing women from homemaking tasks and giving them greater control over their bodies, affirmative action for more women to become managers and leaders, protecting women from domestic violence, among others. These actions require transforming social and economic institutions.

## **6. How is gender mainstreaming done in development planning?**

Mainstreaming gender in development planning involves answering some basic questions. These questions are summarized below.<sup>4</sup> Their application to the MTPDP is discussed in Part II.

### ***Assessment of performance***

- What is the gender impact of past policies and activities (e.g., government's policy responses to the financial crisis of 1998 and the policy reforms in the sector)?

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<sup>4</sup> Using the MTPDP 1999-2004 as the reference point.

Gender impact refers to the extent to which gender inequality in rights, access to resources, and voice was reduced. Gender impact analysis requires first the examination of the manner in which gender inequality was addressed (i.e., how strategic gender needs and practical gender needs were addressed), then relating this to the extent to which gender inequality was reduced (or increased).

### **Challenges**

- Is achieving gender equality considered a challenge in the sector?
- Does gender equality affect other challenges?

As mentioned, gender mainstreaming involves bringing into the mainstream gender equality as a fundamental value. Achieving gender equality should, therefore, be considered a challenge among other challenges. Achieving gender equality, in turn, could facilitate the achievement of other challenges.

### **Development goals and objectives**

- Is gender equality an explicitly stated goal of the sector?
- Does achieving gender equality affect the achievement of other goals?

If gender equality is a fundamental value, its achievement should be considered an important goal or objective of development. This has to be made explicit in the plan, as well as the recognition that the achievement of gender equality could facilitate the achievement of other goals and objectives.

### **Target setting**

- Are targets specified, through the use of sex-disaggregated indicators, to allow assessment of whether gender equality is being promoted?

If gender equality is a fundamental development objective, targets should be set so that progress at the different stages of the plan period can be assessed using sex-disaggregated indicators.

### ***Policies and strategies***

- What policies and activities are proposed to address specific gender equality concerns identified in the assessment and expressed as challenges, goals/objectives, and targets?
- What is the gender impact of policies designed to address macroeconomic or sectoral concerns? How can favorable gender impacts be enhanced or adverse impacts be avoided or mitigated?

Once gender equality is articulated as a challenge, goal or objective, it follows that planners should propose policies and strategies or activities that will address specific gender equality issues identified in the assessment, such as disparities between women and men in labor force participation rates and wage rates, unequal access to credit, etc. Moreover, in formulating policies and strategies to achieve broad macroeconomic and sectoral goals, opportunities for supporting the gender equality objective within such policies and strategies must be identified.

### ***Legislative agenda***

- What legislation is needed to promote gender equality based on an assessment of the current situation and a review of existing legislation?
- What is the gender impact of proposed legislation designed to achieve other objectives?

Existing gender inequalities may be perpetuated by existing laws, e.g., in the ownership and management of properties, the system of inheritance, and in penalties for marital misbehavior. Promoting gender equality in rights requires a periodic review of existing legislation to eliminate bias. Moreover, there is also a need to explicitly consider possible opportunities for promoting gender equality in proposed legislation in order to achieve other objectives.

## ***Framework and Analysis***

The basic questions that serve as guidelines for integrating gender concerns into development planning are deceptively simple. To answer them properly requires

- a framework for analyzing the gender impact of policies and programs;
- a framework for analyzing the role of gender in influencing the basic determinants and consequences of such outcomes as health, education, employment, wage rates, etc.;
- sex-disaggregated data; and
- empirical research on gender impacts and the determinants and consequences of gendered outcomes (i.e., outcomes that are influenced by gender in addition to the commonly known determinants and consequences).

This section discusses frameworks and reviews some empirical research.

### **1. Gender and poverty: are women poorer than men?**

This question, as Cagatay (1998) notes, is frequently posed in literature on poverty. The idea of women being poorer than men, however, can mean one or a combination of the following:

- Women compared with men have a higher rate of poverty.
- Women's poverty is more severe than men's.<sup>5</sup>
- Over time, the poverty rate among women and its severity is increasing compared with that of men.

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<sup>5</sup> Severity of poverty is defined in terms of how far the household income or consumption falls below the poverty threshold. The farther the household income from the threshold, the poorer the household is.

### **Gender and income poverty**

A common approach to studying women's poverty compared with that of men is to compare the poverty rate measured in terms of income or consumption among *female-headed households* with that of male-headed households. The unit of analysis is the household.

It has been argued that there is reason to be concerned about the welfare of female-headed households (compared with male-headed households) if women relative to men find it very difficult to maintain a livelihood for themselves or their children because of gender discrimination in employment, access to credit, and ownership and access to land and other resources. Others argue, however, that if this is the principal concern, then it would be more meaningful to study households that are *female-maintained* rather than female-headed. *Female-maintained households* are those in which women are the primary providers of the family. In any case, Cagatay points out that it is necessary to understand the process through which households become women-headed or female-maintained.

Indeed, without an understanding of the process through which households become female-headed or female-maintained, it would be difficult to interpret current statistical findings. In the Philippines, for example, female-headed households tend to have a lower poverty rate than male-headed households (based on 1997 Family Income and Expenditures Survey of the National Statistics Office). The main source of income among female-headed households come from property income, net share of crops, interest from bank deposits, dividends, etc., rather than from wages and salaries. Female-headed households are mainly headed by widows. Although female-headed households fair better in terms of income or poverty, this does not mean that there does not exist any gender bias that might affect their ability to earn income or to escape from poverty. The potential gender bias and disadvantage that women face relative to men could not be fully brought out by simply looking at differences in the poverty

rates or average incomes (which in this case, contrary to what many would expect, appear to favor women).

Empirical studies on gender and poverty (defined in terms of income or consumption) in developing countries show that persons in male- and female-headed households may not differ significantly with respect to poverty (*Quisumbing, Haddad and Pena, 1999*). Moreover, it cannot be concluded that poverty occurs more among female-headed or among male-headed households because the situation varies from one country to another.

### ***Gender and human poverty***

The lack of clear-cut findings on gender and poverty (in terms of income through comparison of female-headed and male-headed households) has led to the suggestion that poverty should be defined broadly not just in terms of income or consumption (income poverty), but in terms of “capability” or human poverty. According to the latter perspective, poverty represents the absence of some basic capabilities to function, functioning in turn representing the “doings” and “beings” of a person (*Cagatay, 1998; Razavi, 1998*). But if such a broad definition of poverty is adopted, then we are back with assessing differences between women and men in terms of development outcomes, i.e., health, nutrition, education, employment, etc., with attention to how far women compared with men fall below some threshold levels in such outcomes.

However, in the same way that analysis involving statistical comparison of income poverty between female-headed and male-headed households is limited, statistical comparison of human poverty indices between women and men is also limited. As suggested by the authors mentioned above, what is needed is to understand how and why female-headed households tend to fall into poverty at a higher or lower rate and more or less severely

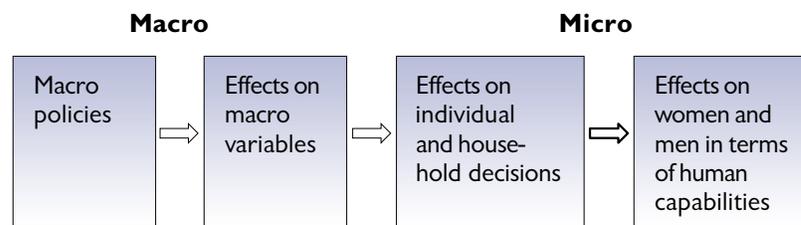
than male-headed households, on one hand, and to understand the determinants of gender differentials in human poverty indices, on the other. This leads us to consider what the situation is among women and men in terms of whether they have an equal chance to have better health, nutrition, education, employment, etc. The remaining sections of this paper attempts to identify factors that contribute to gender equality or inequality.

## 2. Gender and macroeconomic policies

Do macroeconomic policies promote or retard gender equality particularly in rights, access to resources, and voice? Through what processes? To answer these questions, we need to have a framework for analyzing the gender impact of macroeconomic policies.

### ***Framework for analyzing the impact of macroeconomic policies<sup>6</sup>***

The framework shown in Figure 1 and summarized below is constructed to highlight a) the different levels of analysis (i.e., macro and micro levels); b) processes at the micro-level, which include choices that households and individuals make (which might be influenced by gender); and c) outcomes specified to reflect human capabilities.



The impact of macroeconomic policies may be described as follows (see Figure 1):

<sup>6</sup> Based on Herrin, A. N., 1994, "Towards Gender-Responsive Macroeconomic Policies", paper prepared for the National Commission on the Role of Filipino Women.

**Figure 1:  
Analytical Framework for Assessing the Gender Impact  
of Macroeconomic and Sectoral Policies**

Macro-level Processes and Outcomes		Micro-level Processes and Outcomes		
Macro-economic Policies	Macro-economic Processes and Outcomes	Economic Outcomes Facing Individuals and Households by Sex of Individual or Household Head	Individual and Household Choices by Sex of Individual or Household Head	Developmental Outcomes by Sex (Economic and Human Capabilities)
<p><b>Policies:</b></p> <p>Fiscal Monetary Trade Exchange rate External debt Wage &amp; prices</p> <p><b>Policy instruments affecting:</b></p> <p>Interest rate Exchange rate Wages &amp; prices Government revenues &amp; expenditures</p>	<p><b>Macro-processes:</b></p> <p>Operation of:  Labor and other factor markets</p> <p>Goods and services markets</p> <p>Public provision of goods and services</p> <p><b>Macro outcomes:</b></p> <p>Employment</p> <p>Output</p> <p>Prices</p> <p>Level and distribution of publicly provided goods and services</p>	<p><b>Prices of labor (wage rate) other productive assets</b></p> <p>- by type of asset (land, labor, capital)</p> <p>- for labor, by occupation and type of workers</p> <p>- by type of household</p> <p><b>Prices of goods and services</b></p> <p>(Total cost to an individual or household of goods and services)</p> <p>- by type of cost (e.g. money, time, convenience)</p> <p>- by type of household</p>	<p>Entrepreneurial activities by type of establishment or industry</p> <p>Labor force participation by occupation and industry</p> <p>Home production by type of activity</p> <p>Health service utilization by type of service</p> <p>Dietary/Nutrient intake by type of nutrient</p> <p>School participation by level</p> <p>Family size and family planning</p> <p>Migration by destination and type of work</p> <p>Community participation</p>	<p><b>Income</b></p> <p><b>Employment</b></p> <p><b>Health</b> Mortality Morbidity</p> <p><b>Nutrition</b> Growth failure Micronutrient deficiency</p> <p><b>Education</b> Literacy Schooling attainment Schooling achievement</p> <p><b>Fertility</b></p> <p><b>Participation</b></p>

- Fiscal, monetary and trade policies implemented through a set of instruments directly affect key macroeconomic variables such as the interest rate, exchange rate, wages and prices as well as government revenues and expenditures. Changes in these key variables affect the operation (supply and demand) of factor markets (e.g., labor and capital) and product markets (goods and services), on the one hand, and the

public provision and financing of goods and services, on the other. These processes determine the aggregate level of employment and output in both private and public sectors, and the overall price level.

- Within this macroeconomy are individual economic decision-making units, in particular individuals (classified by sex) and households. Individuals and households face a set of factor prices and product prices. Factor prices refer to income obtained either from the sale of labor and other productive assets, or from the use of these factor inputs in the production of goods and services for sale. Product prices are prices for various goods and services, both those supplied by private producers and those that are publicly provided. The total price of a good or service includes not only the money price that the individual or household pays the provider, but also the transportation costs and the value of travel time and waiting time needed to obtain the good or service. Thus, the money prices for health, education and nutrition services would increase if subsidies are reduced, while their time prices would increase if community-based or outreach facilities providing these services are closed down as a result of cutbacks in government expenditures.
- To maximize individual or household welfare subject to income and prices, individuals and households make a variety of decisions. These include whether or not to engage in entrepreneurial activities and to participate in the labor force, and how much time to allocate to various home production activities (e.g., child care, preparation of nutritious meals). With respect to human capital formation, the choices pertain to health service utilization, nutrient consumption, school participation and migration, among others. Reproduction choices include family size and methods of contraception. These and other decisions determine the income, employment, health, nutrition, education and fertility status of a person or household.
- Thus, macroeconomic policies ultimately affect households and individuals by altering the structure of prices that

households and individuals face, whether these prices refer to the price of their labor and other assets or the price of goods and services they produce and consume, the latter including those that are publicly provided. How households and individuals are ultimately affected by the changing structure of prices brought about by the effects of macroeconomic policies depends on their initial situation and the choices that they subsequently make, both of which may be highly influenced by gender bias.

### **Potential impacts: general considerations**

Macroeconomic policies generally revolve around three major areas: fiscal, monetary and external, whether the context is that of stabilization, structural adjustment, liberalization or response to an economic crisis. Within each area are specific policies such as policies on the exchange rate and the external debt.

In assessing the impact of macroeconomic policies, first on macroeconomic aggregates and ultimately on individuals and households, one should note that there can be as many outcomes as there are combinations of specific instruments to achieve a particular policy objective and as there are differing initial conditions among women and men on a number of economic and social dimensions. *Knowing the specific ways in which a policy action is carried out and the characteristics of the population most likely to be directly or indirectly affected is a first step toward a fuller assessment of the gender impacts of macroeconomic policies.*

- **Fiscal policy.** One major policy objective is to reduce the fiscal deficit. This can be done by increasing revenues or reducing expenditures or both. Revenues can be increased through any or a combination of the following actions:
  - ◇ Increase collection efforts given existing tax rates.
  - ◇ Maintain collection but increase tax rates or impose new taxes.
  - ◇ Widen the tax base, keep tax rates the same and maintain collection efforts.

Whichever approach is chosen, it is important to see how the net effects are reflected in relative prices of factors and products, i.e., the relative prices facing individuals and households.

First, the net effect of new revenue generation measures could affect the incomes of some types of enterprises more than others by increasing the cost of non-labor (taxable) inputs and the prices of products.

Secondly, the new revenue generation measures could affect the employment of some groups of the population more than others depending on the employer's response. For example, factory owners may deal with the higher cost of inputs (e.g., due to the higher tax on imported inputs) by reducing production or laying off workers.

Thirdly, these measures affect the prices of some types of goods and services more than others as affected producers pass on the high cost of production to consumers. The subsequent impact of these changes on individuals and households would depend on how important these goods and services are in their consumption baskets and whether they are also producers rather than merely consumers of such goods and services.

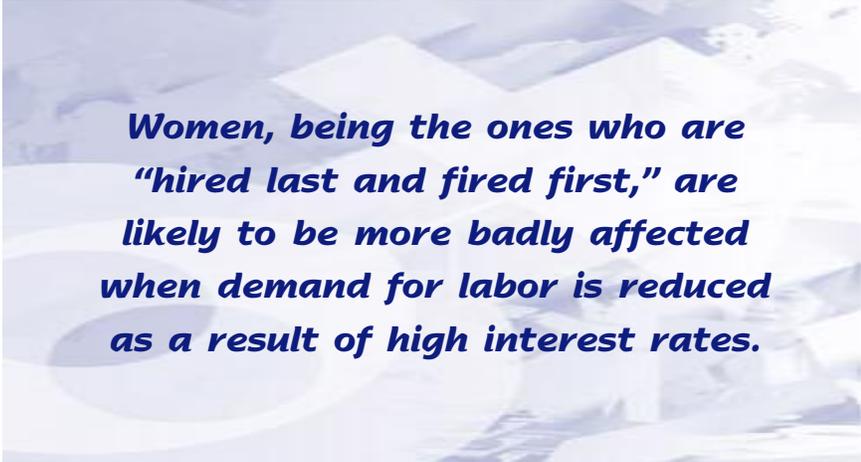
Budget deficits can also be reduced by cutting government expenditure. The effect on women and men would depend on the nature of the cuts, i.e., what was reduced and how it was reduced. Women would be directly and adversely affected if expenditure is reduced on publicly provided goods and services that women consume more than men in view of women's special needs, e.g., the provision of maternal and child care.

- **Monetary policy.** It is the commonly announced policy of most governments to allow markets to determine interest rates. A common goal is to maintain positive real interest rates that encourage savings and investments.

However, some observers have noted that often the overriding goal is to control inflation. This has led governments to pursue a tight monetary policy by restricting the growth of money supply. This measure would result in high interest rates. Moreover, a high interest rate policy has often been used to protect the domestic currency from speculation. Thus measures to achieve other goals, i.e., controlling inflation and protecting the domestic currency, could negate whatever efforts are made to maintain an interest rate conducive to investment and growth.

High interest rates, in turn, could affect the economic activities of both women and men as entrepreneurs by increasing the cost of capital for current operations and future expansion. A regime of high interest rates also slows down investment growth, which can reduce demand for labor. Women, being the ones who are “hired last and fired first,” are likely to be more badly affected than the men in this situation.

High interest rates could also result in higher prices of goods and services as producers shift the higher cost of production to consumers. Again, as relative prices for goods and services change, the net effect on men and women will depend on which goods and services are most affected and which goods and services are important in the consumption baskets of men and women.



***Women, being the ones who are “hired last and fired first,” are likely to be more badly affected when demand for labor is reduced as a result of high interest rates.***

- **External sector policies.** The commonly announced external sector policies include the vigorous pursuit of export expansion through trade liberalization and the maintenance of a flexible exchange rate consistent with international competitiveness. In addition, the government may actively pursue an overseas employment program to increase the flow of dollar earnings from the export of labor.

Although the exchange rate is an important policy tool for a country with a chronic trade deficit, it has been observed that this tool has played a minor role in the stabilization program of the Philippine government. As a result, the trade deficit was reduced not by exporting more or importing less, but by reducing output. The reluctance to use changes in the exchange rate as a major policy tool may be partly due to the perceived short-run adverse effects, such as rapid price increases of imported inputs and consumer goods, which are likely to raise overall prices. These price increases hurt the poor in particular. Note the overriding goal of containing inflation mentioned earlier.

However, protecting the domestic currency in effect means protecting non-competitive, import-substituting industries at the expense of economic efficiency in the long run. Since such import-substituting industries are capital-intensive, continued protection means that their products will cost more compared with imported products, and that labor absorption particularly of women will be slow relative to the rapid growth of the labor force.

- In summary, the impact of macroeconomic policies on specific economic sectors and population groups, including women and men, depends, on the one hand, on what policy instruments are used to achieve a given policy objective and how such policy instruments are implemented, and on the other hand, on the differing initial conditions of different sectors and groups, including men and women.

## **Potential impacts given differing initial conditions of women and men<sup>7</sup>**

The discussion here is organized according to the different decision-making situations that women may find themselves in, relative to men. It thus captures in different ways the distinction often made in literature between the productive and reproductive economy. The discussion constantly refers to gender bias as a determinant of the initial conditions as well as a factor affecting the outcomes of policies.

- **Women as entrepreneurs and managers/executives in enterprises.** Data on the employment of women relative to men from the Census of Establishments suggest that opportunities for women to become major decision makers in enterprises as managers/executives or entrepreneurs are much less than those for men. An exception may be the service industries, where women predominate. Nevertheless, women lack participation in other industries, which may reflect social norms that relegate women to traditional (home-related) activities.

Given the above initial condition of women and men, macroeconomic policies in the form of fiscal and other incentives that tend to favor manufacturing relative to service industries will tend to have a more favorable effect on men than on women in terms of participation in economic decision making.

- **Women in household-operated activities.**<sup>8</sup> Men are likely to dominate household-operated activities in comparison with women, again with the exception perhaps of trade, which can be undertaken at or close to home. If this pattern reflects gender-differentiated roles, then the

<sup>7</sup> Based on Herrin, A. N. and M. F. B. Durano, 1994, "Filipino Women in Economic Decision-Making: A Profile Based on National-Level Data", paper prepared by United Nations Division for the Advancement of Women.

<sup>8</sup> Household-operated activities are farm or business activities operated by the household. As defined by the National Statistics Office in its Survey of Household-Operated Activities, an "operator" can either be self-employed or is an employer in own farm or business. A person is considered an operator if he/she is the one managing the activity.

opportunities for participation in more profitable activities are more limited for women than for men. Because economic policies and programs tend to concentrate on expanding production in agriculture and manufacturing rather than promoting wholesale and retail trade, the direct effects of such policies and programs will tend to favor men relative to women operators.

- **Women in the labor force.** Available data reveal the uneven situation among women and men in the labor force. The labor force participation rate of women is much lower than that of men. In addition, women tend to have higher unemployment rates. With respect to occupation, women tend to dominate as, or make up the majority of, service workers or sales workers. While women tend to dominate the professional, technical and related workers category, they are nevertheless the lowest paid workers in this category, i.e., as public school teachers and nurses. Men, on the other hand, tend to dominate as administrative, executive and managerial workers, as agricultural workers, and as production workers — positions or occupations that generally command higher pay.

In terms of class of workers, men tend to outnumber women as wage and salary workers, and as own account workers, which include employers and the self-employed. Women, on the other hand, tend to dominate as unpaid workers. It is significant that men outnumber women more than two to one in the own-account worker category, where economic decision making is done by the individual either as self-employed or as an employer.

If the pattern of employment of men and women reflects traditional gender roles, then the effects of economic expansion on labor markets are likely to favor men (men rather than women are expected to fill up new job openings). Moreover, when the short-run impacts of

economic policies reduce economic activity, women are more likely than men to be the first ones to lose their jobs.

- **Women's earnings.** Available data from several countries show large differentials in earnings between men and women (Meng, 1996). The differences in the pattern of labor force participation and employment of women and men partly explain wage differentials between them. First, traditional gender roles limit women's choices to fewer occupations relative to men. Thus, there would tend to be excess supply in these "female" occupations relative to demand. As a result, wages would tend to be depressed in these occupations (e.g., teachers, nurses, sales workers) than in other occupations.

Secondly, traditional gender roles limit women's role to that of secondary earner. Women are often expected only to enter the labor force when household income needs to be supplemented as a result of falling incomes of men. In this situation, women are likely to be moving in and out of the labor force much more than men. This means that women would not gain enough skills and experience in the workplace relative to men that would allow them to move up in the earnings scale in any given occupation.<sup>9</sup> Men on the other hand, who are expected to stay longer, if not permanently, in the labor force, tend to move up the earnings scale over time,



***“Women tend to be the last to be hired in times of economic expansion and the first to be fired during economic contraction.”***

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<sup>9</sup> Moreover, given their low commitment to the labor market as primary earner, women may not invest in training activities to upgrade skills as much as men, notwithstanding the fact that training activities for women on a wide range of skills may be more limited than that for men, again as a result of gender bias.

often by acquiring supervisory or managerial responsibilities. Under these conditions, men and women in the same occupation would have different wage rates.

The secondary earner role assigned to women is also likely to influence the hiring practices of employers. Thus, as noted above, women would tend to be the last to be hired in times of economic expansion and the first to be fired during economic contraction. Women might also be offered a lower wage relative to men for the same work, because of the prevailing view that women are merely secondary earners.

Social policies that put emphasis on investments in education and training for women might narrow the earnings differentials if these are caused by differences in human capital. But the differentials due to gender bias as manifested above are likely to remain.

- **Women's time allocation.** Time allocation data generally show that men (fathers and sons) devote more time to market work than to non-market or home activities, while women (mothers and daughters) do the reverse. Work roles by gender are thus preserved and institutionalized in the family. What this implies is that women might be constrained from taking advantage of new opportunities for market work, if they are still expected (under prevailing social norms) to perform the time-intensive non-market activities without men's help.

Moreover, in times of economic hardship women are expected to join the labor market while also being responsible for the non-market tasks at home. This has resulted in heavier burdens for them compared with the men. While women are expected to substitute for men's market time, men are not expected under prevailing social norms to substitute for women's non-market or home production time. This imbalance in men's and women's obligations compounds the adverse impact on women of economic adjustment policies that reduce economic activities in the short run.

- **Women in home production.** Changes in the structure of prices for both privately and publicly provided goods and services brought about by the macroeconomic policies of

government, have important implications for efficiency in home production (for which, in view of gender roles, women are held responsible much more than men). The reduction in public expenditures on social services (e.g., health and nutrition) as a means to reduce the fiscal deficit or restrain aggregate demand could increase the total cost (money and time) of health and nutrition services. Women use many of these services more often than men in view of their special needs, such as maternal care and micronutrient supplementation. Moreover, many of these services are for children but require women's attendance, such as immunization, weight monitoring and treatment of infectious diseases.

The increased prices of basic commodities due to the short-run impact of economic adjustment programs could affect women's time allocation as women substitute higher-priced market commodities with home-produced commodities involving more time inputs from women relative to men. Activities like food preparation, boiling water to make it potable, gathering firewood instead of using kerosene or LPG, or shopping around for lower prices all add to women's burden and reduce women's ability to take advantage of opportunities for earning income outside the home.

### ***Impact of policies: review of evidence***

The above discussion describes the potential impact of macroeconomic policies, whether short-run to stabilize the economy or long-run to affect its structure. Below are examples of the impact of policies, particularly liberalization policies, on women and men as summarized in recent reviews.

- ***Impact of trade liberalization***<sup>10</sup>
  - ◇ Trade liberalization and expansion has affected women (in the absolute sense as well as relative to men) both negatively and positively, depending on a range of factors and preconditions.

<sup>10</sup> Excerpted from Marzia Fontana, Susan Joekes and Rachel Masika, 1998, "Global trade expansion and liberalisation: gender issues and impacts", Institute of Development Studies, University of Sussex, Brighton, U.K.

- ◇ The expansion of export production has been associated with the feminization of the industrial labor force, at least in its initial stages. Women, especially younger, educated women, have been drawn into paid work for the first time in export industries. This has had positive implications for their well-being and autonomy, although controversy remains about the terms and conditions of female employment in export production and evidence shows that the benefits may be short-lived.
  - ◇ Overall, existing evidence seems to suggest that women are likely to benefit from the employment-creation dimension of trade expansion, although this is largely limited to the industrial sector. The situation is much less clear with respect to agriculture. Trade-related employment is also recruiting women in varying degrees in services such as finance, tourism and information processing and in agribusiness and food processing. However, the relative importance of the services sector and women's representation within it varies significantly among regions. The current and prospective labor demand for women workers in the modern services sector has had little study and warrants much more research.
  - ◇ In summary, trade expansion facilitates and accelerates the absorption of women into the modern industrial economy. This has gender equality effects that are strongly positive, even when the conditions of work for women are less favorable than for men in similar occupations.
- **Impact of financial liberalization<sup>11</sup>**
    - ◇ The processes of financial liberalization (FL) and financial sector reform (FSR) are not gender-neutral.<sup>12</sup> Failure to take

<sup>11</sup> Excerpted from Sally Baden, 1996, "Gender issues in financial liberalisation and financial sector reform", Institute of Development Studies, University of Sussex, Brighton, U.K.

<sup>12</sup> Financial liberalization means the removal of government ceilings on interest rates and of other controls on financial intermediaries. It is concerned with macro-economic aggregates (interest rates, savings and investment) and conditions in formal financial markets. Financial sector reform policies complement FL and include a broad range of measures aimed at improving the regulatory and supervisory environment in the financial sector and at the restructuring and development of financial sector institutions (*Baden, 1996*).

gender issues into account in the design and implementation of FSR may lead to inefficient and inequitable outcomes in terms of women's access to financial markets as both users and providers of financial services (credit and savings principally).

- ◇ However, given the limited empirical evidence, it is difficult to make an assessment of the gender impact of financial liberalization. More detailed, sex-disaggregated data on patterns of borrowing, savings and investment and their trends over time are required than are currently available.
- ◇ To date many interventions relating to women in the financial sector have focused on the provision of micro-credit, with limited attention to the broader financial environment. Current emphasis on micro-credit programs for the poor generally and women specifically should now be complemented by making an inventory and assessing the impact of other types of financial sector intervention designed to increase women's access to financial services.

- ***Impact of agricultural liberalization***<sup>13</sup>

- ◇ Agricultural market liberalization policies have focused on increasing incentives to agricultural producers, reforming price regimes, increasing competition and improving the regulatory environment for agricultural trade, and restructuring and privatizing parastatal and government marketing boards. To a lesser extent, pro-active measures to support market development have also been taken.

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<sup>13</sup> Excerpted from Sally Baden, 1998, "Gender issues in agricultural liberalisation", Institute of Development Studies, University of Sussex, Brighton, U.K.

- ◇ The impact of these policies has been varied. In general, supply response to changing agricultural price incentives has not been as substantial as anticipated. Response in the food sector has been better in many cases than in the export sector. This has possible benefits for women producers and traders, who are more likely to be involved in this activity and to control the proceeds from sales of food crops than from non-food cash crop production. While the role of the private sector in agricultural markets has increased, this has not always led to greater efficiency or to competition, even where markets have become integrated. The overall efficiency of marketing systems is hindered by gender biases which favor accumulation and sometimes excessive profits by male-controlled large trading concerns or support services higher up the marketing chain. Although women often comprise the majority of traders, they tend to be trapped in a vicious cycle of petty trading lower down the marketing chain. Lack of economies of scale and poor integration of women in agricultural markets are linked to these gender biases.
  
- ◇ The distribution of benefits from agricultural market liberalization has favored mainly medium and large-scale commercial producers and large-scale private traders, or providers of support services to marketing (e.g. transporters). Women, whose scale of operations is on average smaller than men's, are less likely to have benefited from liberalization policies. They may have gained though from the expansion of local food production and trading, particularly where there is increasing demand for cheap import substitutes such as cassava and other crops traditionally planted by

women, and in processing where increased competition may have helped them obtain a higher price for their products.

### **3. Gender and employment**

#### ***Sex differentials in labor and employment***

As noted earlier, available data generally show that women compared with men have lower labor force participation, have higher levels of unemployment, occupy less prestigious and less remunerative occupations, and have lower earnings. Time allocation studies also reveal the traditional gender roles: compared with men, women tend to devote more time to housework or home production and less time to market work.

The factors affecting the observed sex differentials in employment include the following (*Masika and Joeques, 1996*):

- Supply factors, which determine the quantity and quality of women workers in the labor market (family responsibilities and constraints, and inequalities in education, training and access to productive resources)



***Available data generally show that women compared with men have lower labor force participation, have higher levels of unemployment, occupy less prestigious and less remunerative occupations, and have lower earnings.***

- Demand factors (labor market segregation, discrimination in pay differentials and quality of employment, higher risks of unemployment for women) which are conditioned by specific structures of the economy
- Policies (legislation and regulations, employment practices, hiring standards and wage rates) that discriminate against women and govern their treatment in the economy and labor market

### ***Economic empowerment and gender equality***

Does the labor force participation of women translate into economic empowerment? Masika and Joekes (1996) summarized research studies showing in general that outcomes vary according to the type of economic activity that women are engaged in. Contractual, steady, regular, well-paid work or occupations are expected to be most empowering for women while irregular, low or non-paid work is less empowering.

### ***Impact of social policies***

Social policies aimed at protecting women and promoting equality in the labor market can have unintended negative impacts on women (Rodgers, 1999). For example, while working-hour restrictions help ensure women's physical security and mandated maternity benefits help safeguard women's family responsibilities, these regulations can raise the cost to firms of hiring women. In other cases, measures that can potentially increase women's relative earnings such as equal pay and equal opportunity measures are often difficult to implement and enforce. As a result, such measures have little impact on gender equality.

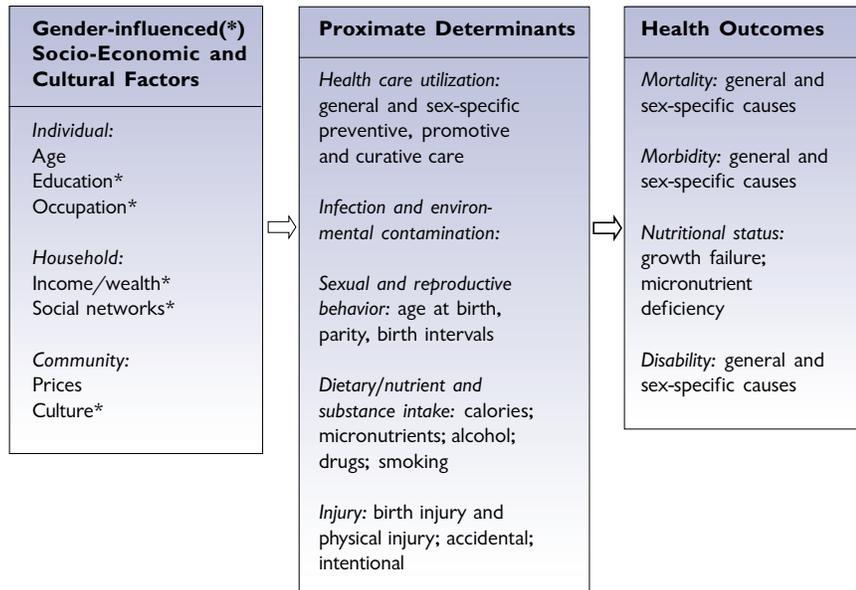
## **4. Gender and health**

### ***Determinants of health: a framework***<sup>14</sup>

The basic components of this framework are the health outcomes, the proximate determinants, and socio-economic and cultural factors, including gender roles and expectations (see Figure 2).

<sup>14</sup> Based on Herrin, 1994, "Population, Health and Women", Journal of Philippine Development, No. 38, Vol. XXI, Nos. 1 & 2, First & Second Semesters, pp. 341-384.

**Figure 2:  
Determinants of Health and the Role of Gender**



Health outcomes are represented by measurable indicators of mortality, morbidity, nutritional status and disability. The proximate (the most direct) determinants of both health and fertility are grouped into five interacting factors: health care which includes preventive (e.g., immunization), promotive (e.g., exercise) and curative care; infection and environmental contamination; sexual and reproductive behavior; dietary, nutrient and substance intake; and injury. Socio-economic and cultural factors are classified into individual factors (e.g., age, education); household factors (e.g., income and wealth, social networks); and community factors (prices of goods and services, culture).

Women's and men's health, as indicated by the four different outcomes, are directly determined by the proximate determinants acting singly or in combination. The socio-economic and cultural factors affect women's and men's health only through their impact on the proximate determinants.

- **Proximate determinants**

**Health care utilization.** Many deaths due to infectious diseases can either be prevented (e.g., through immunization) or treated successfully with curative services. Female-specific diseases such as cancers of the breast and the uterus, micronutrient deficiency during pregnancy and lactation, and health risks associated with the use of contraceptives, require special care.

**Infection and environmental contamination.** In general, the rate and severity of infection and whether it results in death depend on the potency of the infectious agent, the degree of exposure to it, the susceptibility of the host (partly determined by nutritional status), and the quality and amount of health care received. Specific infection such as infections of the genital-urinary tract among pregnant women is one cause of low birth weight and high infant mortality (*Chen, 1983*).

**Sexual and reproductive behavior.** Sexual behavior exposes a person to the risk of sexually transmitted diseases (STDs) which could lead to infertility and cervical cancer. Early motherhood and closely spaced pregnancies increase the risk of maternal malnutrition, morbidity and mortality, as well as the risk of infant and child mortality.

**Dietary, nutrient and substance intake.** Inadequate dietary and nutrient intake leads to poor nutritional status in general. Inadequate micronutrient intake during pregnancy could lead to maternal malnutrition and to low birth weight or increased risk of fetal loss. Abuse of drugs and alcohol and cigarette smoking could seriously affect the fetus and birth outcomes.

**Injury.** This includes birth injury and other injury both physical and mental. Birth injuries can be caused by

incorrect delivery procedures and incompetent handling of complicated cases. Accidental injuries can result from various hazards in the workplace and in the home. Injury arising from violent acts against women, in or outside the home, is usually both physical and mental.

- **Socio-economic and cultural determinants**

**Individual factors.** Health risks and the sources of those risks vary over the life cycle of the individual. Education affects knowledge about health care, infection and environmental risks, nutrition, sexual and reproductive behavior and risks of injury. The education of women is likely to have the most significant impact on health and fertility. To the extent that gender bias prevents women from having the same opportunities for education as men, women's health as well as those of their children will suffer.

**Household factors.** The higher their income and that of their household, the greater is the capacity of women to obtain the needed health care and nutritious food for themselves and their families, and the goods and services that reduce environmental risks of infection and hazards at home that could lead to injuries. The ability of women to have control of income or wealth further enhances their power to make the above health-related decisions, thereby promoting better health for themselves and their families. Societal bias against women having control over household income and resources could hinder the provision of critical health inputs. The constraint posed by limited income can be partly compensated by assistance from social networks especially in times of emergency.

**Community factors.** The cost of health care, nutrition, environmental sanitation facilities, contraceptive methods and other health-promoting goods and services affect the consumption or use of health inputs and the practice of

contraception. Cultural factors, in particular traditional gender roles and expectations, affect health care use, sexual behavior, norms regarding family size and contraception, and attitudes towards violence against women.

### ***Health sector reform and gender impacts***

In response to the slow progress in health improvements, the large variation in health outcomes among different population groups, inadequate and inappropriate health services, and unequal access to health services, the Department of Health (DOH) in 2000 launched the Health Sector Reform Agenda (HSRA). Five major reforms were formulated. These reforms seek to

- provide fiscal autonomy to government hospitals. Government hospitals must be allowed to charge socialized fees so they can reduce the dependence on direct subsidies from the government.
- secure funding for priority public health programs. Multi-year budgets must be provided to eliminate or significantly reduce the burden of infectious diseases as a public health problem.
- promote the development of local health systems and ensure their effective performance. Local government units must enter into cooperative and cost sharing arrangements to improve local health services.
- strengthen health regulatory agencies to ensure safe, quality, accessible, and affordable health services and products.
- expand the coverage of the National Health Insurance Program (NHIP), to extend protection to more people especially the poor.

Do these reforms promote women's access to health services, and therefore, increase women's chances of living longer and in better

health? An approach to the analysis of the impact of reforms is to examine the situation before the reforms and then assess whether the reforms, in terms of design and mode of implementation, are likely to correct the problems they address. For example:

- Is the current funding for priority public health programs, such as the provision of quality maternal and child services (of which women are the main users), adequate and secure, or is it always subject to budgetary uncertainties? Will reform through the use of multi-year budgets ensure funding for the health services that women and children need?
- Does the NHIP provide equal coverage for women and men? Or is the coverage for men greater than for women, because there are more men than women in the formal wage sector? Does the current insurance program cover health services most often needed by women compared with men, e.g., reproductive health services? Will the expanded coverage of the insurance program under the health sector reform program adequately provide for equal access to health services among women and men?

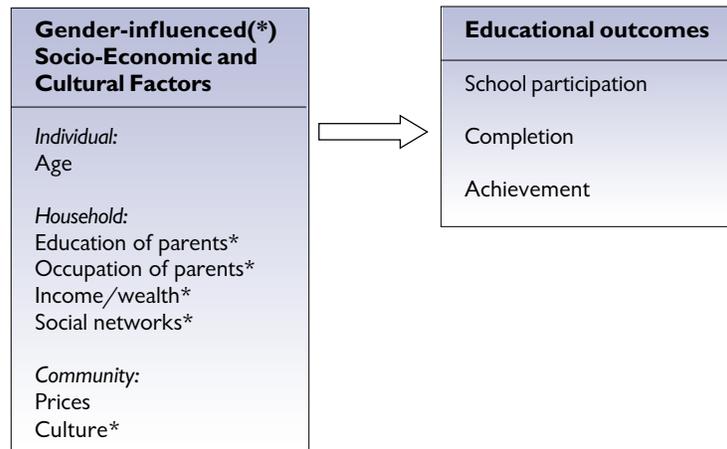
## 5. Gender and education

### **Framework**

The basic components of this framework are the education outcomes and the determinants. The outcomes are participation, completion and achievement. The major determinants are the socio-economic and cultural factors, including gender roles and expectations. (See Figure 3)

Socio-economic and cultural factors are classified into individual factors (e.g., age, education); household factors (e.g., income and wealth, social networks); and community factors (prices of goods and services, labor inputs, culture).

**Figure 3:  
Determinants of Educational Outcomes  
and the Role of Gender**



Underlying the above factors are traditional gender roles and expectations which affect the educational opportunities of parents (mothers) and their choice of occupation, their control over income and other household resources, and their capacity to form alliances and social networks. These in turn affect their decisions regarding their children's school participation and completion, as well as their ability to help educate their children.

For example, applying the framework above, the major factors affecting investment in female relative to male education by parents would include:<sup>15</sup>

- education of parents: less educated parents may be unaware of the benefits and potential returns from female education relative to male education.
- prices of labor inputs: opportunity costs (in terms of domestic labor or market work) of girl's versus boy's education. In this case, a higher opportunity cost of a boy's education relative to

<sup>15</sup> From Sally Baden and Cathy Green, 1994, "Gender and Education in Asia and the Pacific", Institute of Development Studies, Brighton, U.K.

that of a girl, could mean reduced investment in boys' education.

- gender bias in labor and capital markets: discrimination in labor markets and access to productive resources faced by women result in lower earning potential or productivity, thus lowering both the expected and actual returns to female, compared with male, education.
- culture: in some societies parents are able to benefit from daughters' education more than from sons' due to kinship structure, marriage patterns and social obligations, hence, may invest more in daughters' education than sons'. The opposite may be true in other societies.

## 6. Gender and violence<sup>16</sup>

### ***Defining domestic violence***

The United Nations (UN) Declaration on the Elimination of Violence Against Women (1993) defines violence against women as “any act of gender-based violence that results in, or is likely to result in, physical, sexual or psychological harm or suffering to women, including threats of such acts, coercion or arbitrary deprivation of liberty, whether occurring in public or in private life”.

A more detailed and slightly expanded definition is adopted by the United Nations Children's Fund (UNICEF) (2000). Domestic violence is defined to include violence perpetrated by intimate partners and other family members, and manifested through

- ***physical abuse*** such as slapping, beating, arm twisting, stabbing, strangling, burning, choking, kicking, threats with

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<sup>16</sup> From UNICEF, 2000, “Domestic Violence Against Women and Girls”, Innocenti Digest, No. 6.

an object or weapon, and murder. It also includes traditional practices harmful to women such as female genital mutilation and wife inheritance (the practice of passing a widow, and her property, to her dead husband's brother).

- **sexual abuse** such as coerced sex through threats, intimidation or physical force, forcing unwanted sexual acts or forcing sex with others.
- **psychological abuse** which includes behavior that is intended to intimidate and persecute, and takes the form of threats of abandonment or abuse, confinement to the home, surveillance, threat to take away custody of the children, destruction of objects, isolation, verbal aggression and constant humiliation.
- **economic abuse** which includes such acts as the denial of funds, refusal to contribute financially, denial of food and basic needs, and controlling access to health care, employment, etc.

### **Common forms of violence experienced by Filipino women<sup>17</sup>**

As described in the Philippine Plan for Gender-Responsive Development (PPGD) 1995-2025, the most common forms of violence experienced by Filipino women include

- domestic violence (defined as the physical as well as psychological or emotional abuse of a woman by the husband or live-in partner).
- marital rape (includes forcing the wife to have sexual intercourse, striptease or do unacceptable sexual acts, and subjecting her to other sexual brutalities).

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<sup>17</sup> Excerpted from Republic of the Philippines, Philippine Plan for Gender-Responsive Development 1995-2025.

- incest (the commission of sexually inappropriate acts or acts with sexual overtones, with a child or adolescent, by an older person or adult who wields authority through emotional bonding with that child or younger person).
- reproductive rights violations (include forced pregnancy, forced sterilization, forced abortion, or denial of information on and access to safe birth control methods and reproductive technologies).
- rape (as defined under the Revised Penal Code, this occurs under at least one of three specific circumstances: there must have been use of force or intimidation; the victim is “deprived of reason or was unconscious”; the victim is under 12 years old).
- sexual harassment (any unwanted or uninvited sexual attention that creates an intimidating, hostile or offensive environment in the school or workplace, with the harasser usually having power or authority over the victim).
- sexual slavery, prostitution and international trafficking of women.
- pornography and abuse of women in media.
- abuse of women in internal refugee or relocation camps (women displaced by natural disasters or armed conflicts are subjected to sexual harassment, rape and other forms of physical and sexual violation).

***Domestic violence is defined as the physical as well as the psychological or emotional abuse of one spouse by the other, or between live-in partners.***

### ***Determinants of domestic violence (violence against women and girls)***<sup>18</sup>

Cultural, economic, legal and political factors have been suggested as perpetuating domestic violence. Among the cultural and gender-related factors are

- gender-specific socialization;
- cultural definitions of appropriate sex roles;
- role expectations in relationships;
- belief in the inherent superiority of males;
- values that give men proprietary rights over women and girls;
- notion of the family as private sphere and under male control; and
- acceptability of violence as a means to resolve conflict.

### ***Consequences of domestic violence***<sup>19</sup>

Among the consequences of domestic violence are

- denial of fundamental rights;
- non-fatal physical and mental health outcomes, fatal outcomes; and
- health and behavioral problems in children.

It has been argued that strategies and interventions to address the interrelated determinants and consequences of domestic violence require a comprehensive and integrated framework at various levels: family, local community, civil society, state, and the international community.

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<sup>18</sup> From UNICEF, 2000, "Domestic Violence Against Women and Girls", *Innocenti Digest*, No. 6.

<sup>19</sup> From UNICEF, 2000, "Domestic Violence Against Women and Girls", *Innocenti Digest*, No. 6.

# 2 P A R T

## ***Guidelines for Mainstreaming Gender in Development Planning***<sup>20</sup>

### ***A. Basic Questions***

As mentioned in Part I, mainstreaming gender in development planning involves answering a few basic questions. Those questions are repeated here in the context of the format in which the MTPDP is typically formulated, i.e., in the context of assessing performance, articulating development challenges, translating these into goals and objectives, setting targets, formulating policies and programs, and developing a legislative agenda.

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<sup>20</sup> Using the MTPDP 1999-2004 as the reference point.

## Assessment of performance

- What is the gender impact of past policies and activities?

Gender impact refers to the extent to which gender inequality in rights, access to resources and voice was reduced. Gender impact analysis requires first the examination of the manner in which gender inequality was addressed (i.e., how strategic gender needs and practical gender needs were addressed), then relating this to the extent to which gender inequality was reduced (or increased).

## Challenges

- Is achieving gender equality considered a challenge in the sector?
- Does achieving gender equality affect other challenges?

As mentioned, gender mainstreaming involves bringing into the mainstream gender equality as a fundamental value. Achieving gender equality should therefore be considered a challenge among other challenges. Achieving gender equality, in turn, could facilitate the achievement of other challenges.

## Development goals and objectives

- Is gender equality an explicitly stated goal of the sector?
- Does achieving gender equality affect the achievement of other goals?

If gender equality is a fundamental value, its achievement should be considered an important goal or objective of development. This has to be made explicit in the plan, as well as the recognition that the achievement of gender equality could facilitate the achievement of other goals and objectives.

## Targets

- Are targets specified, through the use of sex-disaggregated indicators, to allow assessment of whether gender equality is being promoted?

If gender equality is a fundamental development objective, targets should be set so that progress at the different stages of the plan period can be assessed using sex-disaggregated indicators.

## **Policies and strategies**

- What policies and activities are proposed to address specific gender equality concerns identified in the assessment and expressed as challenges, goals/objectives, and targets?
- What is the gender impact of policies designed to address macroeconomic or sectoral concerns? How can favorable gender impacts be enhanced or adverse impacts be avoided or mitigated?

Once gender equality is articulated as a challenge, goal or objective, it follows that planners should propose policies and strategies or activities that will address specific gender equality issues identified in the assessment, e.g., disparities between women and men in labor force participation rates and wage rates, unequal access to credit, etc. Moreover, in formulating policies and strategies to achieve broad macroeconomic and sectoral goals, opportunities for supporting the gender equality objective within such policies and strategies must be identified.

## **Legislative agenda**

- What legislation is needed to promote gender equality based on assessment of the current situation and a review of existing legislation?
- What is the gender impact of proposed legislation designed to achieve other objectives?

Existing gender inequalities may be perpetuated by existing laws, e.g., in the ownership and management of properties, system of inheritance, and penalties for marital misbehavior. Promoting gender equality in rights requires periodic review of existing legislation to eliminate existing bias. Moreover, there is also a

need to explicitly consider what opportunities exist to promote gender equality in proposed legislation to achieve other objectives.

## ***B. Basic Questions Applied to the ΜΤΡΔΡ 1999-2004***

The above basic questions that are shown here applied to the different chapters of the development plan for 1999-2004.

### **Chapter I: Development Challenges**

#### ***Challenges***

- What is the impact of past development on poverty, in general, and on the poverty of women relative to men in particular? Did it reduce poverty in general and of women in particular, and by how much relative to targets?

In this section of the plan, the discussion on the impact of past development on poverty could be expanded to include the impact on the poverty of women relative to men. The simplest analysis might be to examine data on poverty rates by sex of household head.

#### ***Vision: sustainable development and growth with social equity***

- Does the vision of reducing poverty include reduction in gender disparities in income and quality of life? If so, how is this reflected in this section of the plan?
- What role does gender equality play in achieving sustainable development and growth?

In the plan, the achievement of the vision is to be measured in terms of reduction in poverty, especially in rural areas, and an improvement in the distribution of income. Adopting the broader concept of poverty, i.e., in terms of capability or human poverty, instead of just in terms of income, one could extend the vision of

income poverty reduction to human poverty reduction, with the consequent focus on reducing disparities in human poverty between women and men.

In the discussion of factors crucial to uplifting the lives of the poor and meeting the challenge of the global economy, note could be made of the contribution that gender equality can make to achieving such a vision. It could be stated that greater gender equality not only improves human well-being for all but also increases the overall efficiency of the economy.

### ***Mission***

- Is the participation and empowerment of the citizenry, particularly of women relative to men, a priority area? If so, how is this reflected in the mission statement of the plan?

The plan speaks of policies being directed towards several priority thrusts, such as accelerating rural development, delivering basic social services, strengthening competitiveness, ensuring macroeconomic stability, and reforming governance. But nothing specific is said about the participation and empowerment of citizens, particularly women in relation to men. Empowerment could both be a mission and a guiding principle (see below).

### ***Guiding principles***

- Is gender equality one of the guiding principles? If so, how is this reflected in this section of the plan?
- How does gender equality relate to the other guiding principles?

The first principle stated in the plan is equity. As a guiding principle, equity calls for the improvement of the quality of life of all Filipinos, particularly the poor and the disadvantaged. One could explicitly add women in relation to men as among those that require added focus in quality of life improvements. This could then be strengthened by following up with the principle of “Empowerment and Gender Equity in Development”, which the plan explicitly adopts. In another vein, achieving gender equality relates to other guiding principles, such as efficiency.

## Chapter 2: Social Reform and Development

### *Assessment of performance*

- What has been the progress towards reducing gender disparities in key development outcomes/indicators and access to services?
  - ◇ Health, nutrition, and education outcomes
  - ◇ Access to health, nutrition and education services
  - ◇ Access to housing services
  - ◇ Access to social welfare and community development services
- What factors were important in reducing such disparities?
- What is the gender impact of major shocks, e.g., the financial crisis and the Mindanao armed conflict?

Analysis of the gains in life expectancy, literacy and nutrition highlighted in this section should include analysis of the gains in the well-being of women relative to men. Sex-disaggregated data on health outcomes, for example, are needed similar to that provided for nutritional status.

Reduction in gender disparities in well-being are partly due to improvements in access to health and education services by women relative to men. Discussion on access to services should be extended to examine the access by women relative to men. Has women's access to health and nutrition services improved relative to men's? Similarly, have more women been availing of education services such as Government Assistance to Students and Teachers in Private Education (GASTPE) and scholarships, how do they compare with the men? With respect to housing services, have housing programs equally benefited female-headed and male-headed households? Have social welfare and community development programs been of benefit to women and men equally? Finally, who are the beneficiaries of the credit programs, employment facilitation services and other services of the Department of Labor and Employment (DOLE)?

In other words, in this section, there is opportunity to undertake gender analysis based on available sex-disaggregated data. Of course, there is an urgent need to produce sex-disaggregated data both on indicators of well-being, i.e., health, education, nutrition, and on indicators of access to services that help improve these indicators of well-being, i.e., access to health services, nutrition services, education services, housing, and community development.

The plan also discusses the impact of the financial crisis. Indeed, any major economic shock is likely to affect government provision of, and access to, basic services. Further analysis is needed to determine whether women's access to basic services has been reduced much more than that of men.

A special concern is the current armed conflict in Mindanao and its impact on women relative to men. Armed conflict often leads to the displacement of families from their communities. Such a displacement makes women even more vulnerable to sexual harassment, abuse and other forms of violence. On the other hand, such a conflict situation provides an opportunity to promote leadership roles for women as managers of displaced communities and as peacemakers.

### **Issues and challenges**

- Is achieving gender equality a major challenge? If so, how is this reflected in this section of the plan?
- How does the effort to achieve gender equality affect other challenges?



If the assessment in this chapter included gender equality issues, e.g., access by women (compared with men) to basic services, then the challenges should also be specific about how these gender equality issues are to be addressed.

### ***Development goals and objectives***

- Is gender equality a major goal of the sector? If so, how is this reflected in this section of the plan?
- How does achieving gender equality affect the achievement of the other goals?

### ***Policies and strategies***

- What is the gender impact of key reforms? How will proposed policies reduce gender inequalities?
  - ◇ Health sector reforms
  - ◇ Education reforms
  - ◇ Housing reforms
  - ◇ Social welfare and community development
  - ◇ Labor market reforms

This section of the plan is almost silent on how women relative to men are likely to be affected by the policies and strategies that have been formulated. It should discuss the matter more explicitly. It should also be more explicit on what policies and strategies are formulated to specifically address strategic gender needs.

### ***Targets***

- Are targets specified, through the use of sex-disaggregated indicators, to allow assessment of progress towards, e.g., reduction in differences between the sexes in life expectancy, infant mortality, children's nutritional status, participation rate, cohort survival rate, completion rate, achievement rate, drop-out rate?

### **Priority sector activities**

- What is the expected gender impact of selected sector activities?
  - ◇ Health, nutrition and population
  - ◇ Education
  - ◇ Housing
  - ◇ Social welfare and community development
  - ◇ Labor and employment

Are there any sector activities that specifically address strategic gender needs as distinguished from only practical gender needs?

### **Priority legislative agenda**

- What is the gender impact of selected proposed legislation?

Aside from the legislative areas of domestic violence, trafficking of women, and child protection, are there opportunities in other legislation for addressing strategic gender needs? For example, what provisions under the law creating local housing boards for urban areas provide opportunities for women relative to men to participate as members and decision makers in such boards?

## **Chapter 3: Agriculture, Agrarian Reform and Natural Resources**

### **Assessment of performance/Challenges**

- What is the gender impact of major policy reforms in the sector (agriculture, natural resources management and environmental protection, agrarian reform) implemented during the period under review?
- What is the gender impact of major external and other shocks (e.g., financial crisis or weather disturbance) during the period under review?

- What is the gender impact of specific activities implemented during the past planning period? Specific questions might be asked, for example:
  - ◇ Were gender concerns integrated into the training modules on Farm Systems Development?
  - ◇ Did women's access to land improve relative to that of men?
  - ◇ Did women's access to credit from public banks, cooperatives and other agricultural inputs and services improve relative to that of men?
  - ◇ Was the development of Small Engineering Technologies for women an effective way of enhancing women's participation in the agriculture sector?

With respect to challenges, which were incorporated in this section along with assessment, the following questions may be asked:

- Is reducing gender inequalities a major challenge in the sector? If so, how is this reflected in this section of the Plan?
- Can reducing gender inequalities in the sector be both a means and a result of meeting other key challenges? For example, would reducing gender inequalities in agriculture help increase agricultural productivity, and would efforts to increase agricultural productivity help reduce gender disparities?

### ***Development goals and objectives***

- Is gender equality a goal to be pursued in this sector, in line with the goal of attaining sustainable rural development, founded on a modernized agriculture and fisheries sector, and a diversified rural economy that is responsive to the needs of the population? If so, how is

this reflected in this section of the plan?

- How does gender equality affect the goal of achieving a modern agricultural sector (dynamic and open to innovation and change; highly productive and competitive; enterprising farmer making wise choices as to technology, crop variety, market outlets)?

### ***Policies and strategies***

- What is the gender impact of the proposed policies and strategies (e.g., tariff reform program to correct uneven protection across commodities)?
- How can gender equality help achieve stated policies and strategies (e.g., improving delivery of support services for each major subsector)?
- How can gender impacts be enhanced (e.g., access to credit and long-term financing)?

The framework on analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here.

### ***Targets***

- Are there any gender-related targets associated with the stated targets (e.g., access to land and other productive resources)? How are these reflected in this section of the plan?

### ***Priority sector activities***

- What is the gender impact of selected activities, that is, how do women in relation to men contribute to and benefit from specific activities?

### ***Legislative agenda***

- What is the gender impact of selected legislation?

## **Chapter 4: Industry and Services**

### ***Assessment of performance***

- What is the gender impact of liberalization, deregulation, and privatization in specific sectors?
- What is the gender impact of major economic and other shocks (e.g., financial, political)? What sector was affected most?

The framework on analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here.

### ***Development goals and objectives***

- Is gender equality also a goal to be pursued in line with other goals, e.g., attaining global competitiveness, increased income and employment opportunities, and transformation into a high value-added service economy? If so, how is this reflected in this section of the plan?
- How does gender equality affect the achievement of the other goals?

### ***Policies and strategies***

- What is the gender impact of the proposed policies and strategies (e.g., liberalization in trade)?
- How can gender equality help achieve stated policies and strategies (e.g., develop competitive and high value-added new products)?
- How can gender impacts be enhanced in such areas as access to credit, human resource development?

The framework on analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here.

### ***Targets***

- Are there any gender-related targets associated with the stated targets?

### ***Priority sector activities***

- What is the gender impact of selected activities? Or, how do women in relation to men contribute to and benefit from specific activities?

### ***Legislative agenda***

- What is the gender impact of selected legislation?

## **Chapter 5: Infrastructure Development**

### ***Assessment of performance***

- What is the gender impact of major policies during the period under review (e.g., liberalization of the telecommunications industry, deregulation of air and water transport, solution to the power crisis, and major public investment projects)?

The framework for analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here. Like the chapter on agriculture, there is no separate section in this chapter that presents challenges. Hence, the questions asked in the other chapters (or sectors) are relevant here, namely:

- Is reducing gender inequality a major challenge in this sector? If so, how is this reflected in this chapter?
- Can reducing gender inequality in this sector affect the ability to meet other challenges of this sector? In what way?

### ***Development objectives***

- Is gender equality a goal to be pursued in this in line with other goals? If so, how is this reflected in this section of the plan?
- How does gender equality help achieve the other goals of the sector?

### **Strategies, targets, priority activities, and legislative agenda**

- What is the gender impact of selected strategies, activities, and legislation in
  - ◇ energy (e.g., expand electrification in the countryside)?
  - ◇ transportation (e.g., full cost recovery of services)?
  - ◇ communications (promotion of value-added services and their advanced uses in business and other professional opportunities)?
  - ◇ water resources (e.g., improved water supply, sanitation and sewerage; irrigation development and pricing policies)?

In the strategies for these sectors, what opportunities exist (and were taken) to address strategic gender needs (e.g., professional opportunities in communications)? Likewise, what opportunities exist (and were taken) in improving equality in access by women and men to basic infrastructure services, e.g., electrification for home and economic activities, water resources?

## **Chapter 6: Governance and Institutions Development**

### **Assessment of performance**

- What is the gender impact of major policy reforms in the public sector during the period under review? Examples of reforms are the following:
  - ◇ Streamlining of the bureaucracy (through attrition, devolution and privatization) and increase in average per capita compensation
  - ◇ Privatization program for government corporations
  - ◇ Reforms in the administration of justice

Did women in government, compared with the men, suffer more from attrition and loss of jobs? And did the income disparity between women and men widen or narrow as a result of the

reforms?

### **Challenges**

- Is gender equality considered a challenge in this sector? If so, how is this reflected in this section of the plan?
- How does meeting the challenge of gender equality affect the other challenges mentioned in this chapter?

In the MTPDP, this section described a number of challenges with little attention to their gender dimensions. The gender equality challenge may be reflected in the specific challenges enumerated.

For example:

- How does the promotion of efficient and effective governance through reengineering, streamlining and right-sizing of the bureaucracy affect the security of tenure of women employees relative to men?
- How does making compensation more competitive with that of the private sector affect women government employees relative to the men?
- To what extent does improving peace and order, law enforcement and administration of justice favorably affect women's security relative to men?

In short, as government tries to meet the challenge of effective governance, are its women employees compared with the men a) less or more at risk of losing their jobs; b) likely to have higher or lower earnings; c) under less or greater threat of physical abuse; and d) less or more likely to experience unequal treatment, e.g. in the enforcement and administration of justice?

### **Development goals and objectives**

- Is gender equality a goal to be pursued in line with other goals and objectives of the sector? If so, how is this reflected in this section of the plan?
- How does gender equality help achieve the other goals of

the sector?

### ***Policies and strategies***

- What is the gender impact of specific policies and strategies, such as
  - ◇ reengineering the bureaucracy;
  - ◇ rationalizing compensation and incentives systems for government personnel;
  - ◇ building capacities, core competencies and skills of civil servants, local government units, and civil society organizations;
  - ◇ multi-year budget planning;
  - ◇ better targeting of recipients of government assistance;
  - ◇ improving peace and order, law enforcement, and administration of justice;
  - ◇ reducing graft and corruption; and
  - ◇ sustaining and deepening the devolution process.

Are women relative to men given equal opportunity to take advantage of new job offerings in the reengineered bureaucracy? Do women have equal opportunity to obtain compensation commensurate with productivity; obtain new competencies and skills; and receive government assistance?

### ***Priority sub-sector activities***

- What is the gender impact of selected priority sub-sector activities?

What specific activities provide for the equal opportunities mentioned in “Policies and strategies”? How specifically are strategic gender needs addressed by these sub-sector activities?

Priority legislative agenda

- What is the gender impact of selected legislation?

## **Chapter 7: Macroeconomic Framework and**

## **Development Financing**

### ***Assessment of performance***

- What is the gender impact of major macroeconomic policies (monetary, fiscal, trade, exchange rate) during the period under review?
- What is the gender impact of major shocks experienced during the period under review (e.g., financial crisis, political crisis)?

The framework for analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here.

### ***Challenges***

- Is achieving gender equality considered one of the challenges? If so, how is this reflected in this section of the plan?
- How does gender equality affect other challenges (e.g., reducing poverty and income inequity, increasing productivity and competitiveness)?

### ***Development objectives***

- Is gender equality a goal to be pursued in line with other goals and objectives of the sector? If so, how is this reflected in this section of the plan?
- How does gender equality/equity help achieve the other goals of the sector?

### ***Policies and strategies***

- What is the gender impact of the proposed policies and strategies?

The framework for analyzing the gender impact of macroeconomic policies described in Part I would be useful reference here.

### ***Targets***

- Are there gender-related targets (i.e., reducing gender disparities) associated with the stated targets (i.e., in areas of concern such as labor and employment, and poverty)? How are these specified, i.e., what indicators are used?

***Priority sub-sector activities***

- What is the gender impact of selected activities?
- How are strategic gender needs addressed by these activities?

***Legislative agenda***

- What is the gender impact of selected legislation?

# 3 PART

## ***Gender Analysis: Selected Case Studies***

Below are selected case studies by NEDA specialists who applied the frameworks presented in Part I of this guidebook. The case studies include:

- Gender and the completion rates in basic education
- Gender and reproductive health
- Gender and the diversification of production and resources in agriculture
- Gender and trade liberalization
- Gender and the liberalization of the telecommunications industry

In the first case study, the analysis is focused on the determinants of gender disparity (favoring girls) in the completion rate in basic education. The analysis is then extended to also look at the consequences of this disparity.

In the second case study, the focus is on the consequences on reproductive health of gender bias in reproductive decision making. The study extends the analysis to look at the macroeconomic implications of sectoral policies designed to address the adverse consequences on reproductive health.

The third case study looks at the economic impacts of the strategy of crop diversification in agriculture, the issue of whether women and men benefit equally from favorable impacts, what constraints women face relative to men in taking advantage of the potential benefits, and what can be done to address such constraints.

The fourth case study outlines the general economic impacts of trade liberalization, and examines how these impacts affect women as suppliers of labor inputs, as producers of goods and services, and as consumers.

The last study outlines the general impacts of liberalizing the telecommunications industry and indicates the likely impact on women as suppliers of labor inputs.

## ***Gender and the Completion Rates in Basic Education***<sup>21</sup>

The education sector plays a very important role in the country's human capital formation, which, in turn, is the linchpin of economic development. The sector's role in national development has been established by various studies which show its direct linkage with economic growth. Even traditional economic analysis of the interplay of variables such as output (Y) on one hand, and land (D), labor (L), and capital (K) on the other, points to an

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<sup>21</sup> By Allan O. Millar, Senior Economic Development Specialist, Social Development Staff, National Economic and Development Authority. Prepared and presented during the Writeshop on Developing Guidelines for Formulating Gender-Responsive Development Plans, 28-29 November 2000, SEAMEO-INNOTECH, Quezon City.

unexplained contributing factor (residual). This unexplained portion of growth not attributed to changes in the traditional factors (land, labor and capital) has been associated with human capital formation, where education and training play a crucial role (in addition to health, nutrition and other social variables). It has also been established that, within the education sector, basic education (primary and secondary levels) has the highest rate of return, whether to the individual or to the country as a whole. It is the stage where basic skills are learned, and prepares individuals for higher learning or economic activity (in case they will not be able to pursue higher education). It is for this reason also that the government treats basic education as a priority social service.

This traditional analysis of the contribution of education, particularly basic education, to individual productivity and economic growth tends to overlook the disparities between boys and girls, especially in the area of completion. While enrolment rates for boys and girls are almost equal, a closer look at sex-disaggregated completion rates<sup>22</sup> reveal that boys lag by almost 10 percentage points (see Table 1).

**Table I.**  
**Completion Rates for Primary and Secondary Levels, by Sex**  
**SY 1996-1997 & SY 1997-1998**

	SY 96-97		SY 97-98	
	Male	Female	Male	Female
<b>Elementary</b>	61.98	72.05	63.19	72.66
<b>Secondary</b>	63.28	74.99	66.29	76.35

Source: Department of Education

<sup>22</sup> Completion rate for basic education is defined as the proportion of enrolled students in Grade 1 or First Year who completed Grade VI or graduated from high school, respectively.

Given the disparities between boys and girls in terms of completion rates, it is necessary to analyze the underlying causes and consequences/effects of such disparities. To do this, the following questions need to be asked:

## **Underlying causes**

### ***How does the socialization of boys and girls affect the situation? Is there gender bias?***

- Socialization/stereotyping in the early stages of life (societal factors)

This is a reflection of the “prescribed” roles of individuals within a given household, i.e., market/economic work for males and home work for females. At this very early stage, the household head or the parents already make some initial judgment on the possible and immediate economic contribution of boys and girls if they will quit schooling and engage in economic activity.

The government’s overall policy (MTPDP, p. 2-44) is focused on “closing the access and quality gap between private and public schools, urban and rural areas, and focusing on the needs of disadvantaged groups.” However, in terms of interventions to put the policy into operation, strategies are focused on the education side (expanding resources). There is no adequate focus on the households side of the issue, i.e., boys are forced to work while girls are allowed to study. The current national medium-term plan recognizes gender disparities only in higher education (MTPDP, p. 2-32).

### ***How does the economic situation interplay with other factors such as socialization and stereotyping?***

- Short-run necessities and opportunity cost (total cost to an individual or household of goods and services)

Faced with poverty, household heads or parents make a choice between meeting their day-to-day necessities and ensuring a better future for their children. In this situation, the opportunity cost of engaging in an economic activity outweighs the opportunity cost of going to school. This household perspective should be contextualized within the economic factors that give rise to the phenomenon of child labor in the Philippines. In addition to being the poor households' immediate response to poverty, child labor is part of the cheap labor that poor countries are forced to exploit for their comparative advantage in the globalization process.

The government's response to the challenges of having to improve the economic well-being of the poor, on one hand, and keeping children in school and ensuring effective learning, on the other, is contained in its strategy to alleviate poverty and improve access to basic education. In addition to its effort to improve the overall performance of the economy and alleviate poverty, the government is seeking higher completion rates in basic education through: a) the reduction of classroom backlogs and teacher shortage; b) reduction of incomplete elementary schools through the provision of additional classrooms and teachers, and creation of multigrade classes in appropriate areas; c) reduction in the number of rural barangays without elementary schools and the number of municipalities without high schools; and d) augmentation of funds for the School Building Program from the private sector and Official Development Assistance (ODA). However, it should be noted that past approaches did not consider gender disparities. In addition, education strategies (in terms of education inputs, such as resources and facilities) were often focused on the education sector per se and did not adequately look into the link between the short-run priorities of the households tied to poverty and decisions on the schooling of children.

## **Consequences/effects**

### ***At the national level, what is the medium- to long-run impact if the gender disparity in completion rates continues?***

- Economic inefficiency

Failure to address the disparities due to gender bias and poverty affects the quantity and quality of human resources and the productive capacity of the economy in general.

While data in many countries typically show lower schooling completion rates for girls than boys, data from the Philippines suggest the opposite. The government must realize the long-run implications of the lower completion rates of boys relative to girls. Apart from the focus given to education inputs to address the problem of low completion rates in general, there is a need to put additional focus on the problem of lagging completion rates for boys relative to girls and the consequent impact on future labor productivity.

The elimination of the gender gap in education can be expected to contribute to increased future productivity of males who will enter the labor force with a higher level of education than if present disparities in completion rates continue.

### ***At the individual level, what is the effect of working early and foregoing the long-run benefits of completing basic education?***

- Those who leave school, whether on their own initiative or in obedience to their parents, often get stuck with low-paying jobs. They tend to pass on the same attitude toward schooling to their children, who get caught in the same economic condition, and so on, in perpetuation of the vicious cycle.

## Recommendation

There is a need to revisit the targeting of school-level interventions not only to keep children in school but also to encourage parents, in spite of the poverty situation (higher opportunity cost of child labor as opposed to schooling), to send their children to school. For example, an approach that may be explored is to provide livelihood opportunities to targeted poor household heads with children provided that they send their children to school. This will reduce the attractiveness of deciding to pull out their children from school to help support the family, thereby augmenting the interventions at the school level. However, there is a need to closely examine the time-frame. A mechanism must also be put in place to sustain the gains even after the program has ended.

## Limitations

This analysis could be expanded to include: a) data on the experiences of other countries with similar situations (lagging completion rates of boys); and b) spatial analyses to show which regions have higher disparities and whether this is attributed to the same factors cited in this paper.

## ***Gender and Reproductive Health***<sup>23</sup>

Reproductive health (RH) has often been misunderstood to mean only family planning (FP), which in turn is associated with population policy aimed at slowing down population growth. But reproductive health goes far beyond the concept of population control, for it is grounded in reproductive rights<sup>24</sup> and gender equality. The 1994

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<sup>23</sup> By Rhodora A. Tiongson, Economic Development Specialist II, Social Development Staff, National Economic and Development Authority. Prepared and presented during the Writeshop on Developing Guidelines for Formulating Gender-Responsive Development Plans, 28-29 November 2000, SEAMEO-INNOTECH, Quezon City.

<sup>24</sup> The International Conference on Population and Development Programme of Action (1994) defines reproductive rights as the recognition of the basic right of all couples and individuals to decide freely and responsibly the number, spacing and timing of their children and to have the information and means to do so and the right to attain the highest standards of sexual and reproductive health.

International Conference on Population and Development (ICPD) in Cairo defines RH as a “state of complete physical, mental and social well being and not merely the absence of disease or infirmity, in all matters relating to the reproductive system and to its functions and processes.” It is about men and women having an equal voice in planning their family, and enjoying their sexual life without fear of having an unwanted pregnancy or being exposed to sexually transmitted disease.

### **Gender issues in reproductive health**

Unequal gender relations in reproductive decision-making are slowly but alarmingly creating a negative impact on the country’s reproductive health program. Men’s tendency to be the ultimate decision makers in sexual relations, childbearing and child rearing have put the burden of family planning on women. While women may desire to postpone having the next child, their partners might be demanding another child soon. Men significantly influence decisions on family size. Although seven in 10 currently married women say that they want the same number of children as their partner, one in five currently married women believes that her partner wants more children than she does. Women with no education (32%) and those living in the Autonomous Region of Muslim Mindanao or ARMM (42%) are more likely than other women to say that their partner wants more children than they do. In the 1998 National Demographic and Health Survey (NDHS), 5.5% of the respondents cited husband’s opposition as the reason for not using contraceptives, despite the latter’s desire for family planning.

Also, women generally assume the responsibility for birth control. The use of contraceptive methods designed for men including condoms, withdrawal, periodic abstinence and vasectomy lags behind those designed for women such as the pill, IUD, female sterilization and injection. According to the 1998 NDHS, the pill and female sterilization are the most frequently used methods of contraception (10% each). Although the pill has more side effects and costs more than the condom, it continues to be the most prevalent method. Similarly, female sterilization, which is a more

risky and more invasive procedure than its male counterpart (vasectomy), continues to be practiced much more widely than the male methods.

## **Determinants of the gender issue**

Men's contribution to reproductive health has been limited. Gender roles and cultural expectations have left men less aware of and knowledgeable about family planning, contraceptive choices, and even the prevention of sexually transmitted diseases (STDs). RH programs, having been generally focused on women, are also partly to blame. RH services directed toward men have concentrated mainly on STD treatment and control. Even when they have better access to RH information, men may lack interest in the matter because they see this as a woman's concern. And although some men do want to space their children, they are often unwilling to go to public clinics for RH services since these are "women's places" used mainly for maternal and child health services.

At the same time, men have continued to play the role of patriarch and primary decision maker on family and reproductive issues, expecting women to submit to their wishes. For men of low status, control over women offers a position of power denied them in other areas of their lives. Fear of family or community disapproval, and especially the threat of physical punishment or exclusion, may force women to just do what is expected of them. They have little or no say on when to have sex or when to get pregnant. This situation is more common among women with little education, usually among poorer households.

## **Policies to address the determinants**

Addressing such inequality in reproductive decision making requires a community-oriented public health approach, emphasizing shared roles for women and men in reproductive health.

The Philippine Population Management Program, 2001-2004, aims to reduce or eliminate the unmet needs of men and women in RH, helping couples to have the number of children they want and preparing young women and men to become responsible parents. It recognizes the need to involve men as equal partners of women in attaining reproductive health. The program provides for capability building/training in reproductive health practice, as well as education on sexuality and gender issues including violence against women.

The HSRA, on the other hand, seeks to institute reforms in health service delivery. The establishment of local health networks and the upgrading of local health facilities will promote the safer use of family planning methods and make these methods available to more users, especially the poor who usually go to rural health units and barangay health stations for free health services. Efforts to promote community-based primary health systems are likewise strengthened by the Barangay Health Workers' Benefits and Incentives Act of 1995 and the Magna Carta for Health Workers.

### **Link to the macroeconomy**

Reproductive health programs including family planning are funded by the government and foreign donors, and are highly dependent on macroeconomic variables. Organizational and financing choices are underpinned by macroeconomic considerations such as the country's fiscal policy. When a country suffers from economic crisis and international aid is also scarce, the government may decide to manage its deficit by reducing the budget for the social sector, thereby affecting the delivery of basic social services. In the health sector, FP and RH services are among the most likely to suffer cutbacks. Budget cuts in labor, education and related sectors can also affect reproductive health indirectly, by limiting women's access to education and work opportunities which could empower them to assert their sexual rights and to make intelligent decisions regarding contraception and other RH concerns.

## **Consequences of gender inequality**

Unequal gender relations in RH - characterized by women's sexual passivity, men's low awareness of and lack of responsibility for RH, and women's assumption of the burden of family planning, contribute to the prevalence of sexually transmitted infections, reproductive tract infections and infection with the human immunodeficiency virus or HIV (leading to AIDS) since women cannot negotiate for safe/protected sex (men for instance are often not inclined to use the condom). Gender inequality may also be a factor in the high incidence of unwanted pregnancies and abortions, poor health among pregnant women/mothers and their children, and maternal and infant deaths.

In the Philippines, 10 women die every 24 hours from causes related to pregnancy and childbirth, about 60 percent of pregnancies are considered risky, and a total of 30,404 women were admitted to hospitals for abortion in 1998. The maternal mortality rate is relatively high compared with Asian neighbors. Infants/children of mothers who had no antenatal care or medical assistance at the time of delivery, lack access to health services/facilities, have no education or have a low level of education, etc., are more likely to have higher mortality rates than those with mothers who have had more schooling and may be better able to assert their sexual and reproductive rights.

## **Macroeconomic implications**

The above statistics show the need for the government as well as external donors to make a greater investment in primary health care particularly of mothers and children. The most affected sector (the poor, especially women) have become heavily dependent on public facilities and major health programs and projects, and a reduction in the capacity of the public health system and these programs/projects to deliver FP/RH services will certainly affect them adversely. Moreover, reproductive health partly determines

the nation's overall health, which in turn is an important component of human capital. Investments in health have direct effects on productivity and thus on economic growth — people are more energetic and productive when they are in good health.

Current initiatives in health care include programs like Urban and Rural Family Health Services, AIDS Prevention and Control, AIDS Surveillance and Education, Urban Health and Nutrition, and Women's Health and Safe Motherhood. The DOH is also implementing the HSRA to improve health service delivery, health care financing and health regulation, all the components being instrumental in promoting and sustaining reproductive health care. The NHIP is also being improved to make health care more affordable and accessible.

### **Initial guidelines for mainstreaming gender in the health sector**

- What sex-disaggregated data are available that will facilitate the analysis of gender issues in health?
- What are the gender issues in health? How do these issues affect the health of men and women in general?
- What are the underlying causes of those gender issues?
- Are existing health policies responsive to the unmet gender needs? What are the gaps in health programs/projects/policies that need to be addressed to promote gender equality?
- How do macroeconomic policies/decisions affect the gender issues in health?
- What are the consequences of the gender issue/s? What are the policies/ programs that address these consequences?
- What are the impacts of such consequences on the health sector?
- How do the impacts on health link to the macroeconomy?

## ***Gender and the Diversification of Production and Resources in Agriculture***<sup>25</sup>

Diversification of production and resources is a policy/strategy aimed at alleviating poverty by increasing productivity and income. This will be achieved, among others, through: a) production of high value crops, b) undertaking high value-adding activities such as processing, and c) exploring underutilized resources such as marine resources.

A quick analysis shows that diversification does benefit farmers, fisherfolk and agricultural workers. However, gender analysis must be undertaken to determine the particular effect on women and men, and whether they benefit equally. Policy measures may then be adopted to compensate for or mitigate the negative effects, if any.

Gender analysis of this policy was undertaken using the following guide questions:

### ***Guide question: What are the expected direct positive impacts of the policy/strategy?***

The direct positive impacts should include

- increase in income since diversification involves the production of high-value crops and/or conduct of high-value adding activities such as processing, etc.;
- increase in employment opportunities in the processing of primary products, and in industry; and
- promotion of sustainable agriculture as this explores marine resources and allows land-based resources to regenerate.

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<sup>25</sup> By Ma. Cristina DM. Carambas, Supervising Economic Development Specialist, Agriculture Staff, National Economic and Development Authority. Prepared and presented during the Writeshop on Developing Guidelines for Formulating Gender-Responsive Development Plans, 28-29 November 2000, SEAMEO-INNOTECH, Quezon City.

**Guide question: Would the policy benefit men and women equally without encountering any constraints?**

The policy should benefit both men and women if

- both have equal access to needed resources and support services particularly training and extension;
- women are willing and able to participate fully in productive activities, given their reproductive functions;
- women labor is properly priced; and
- necessary guidelines/measures/support with regard to proper and productive utilization of marine resources have been put in place by concerned agencies, i.e. the Department of Agriculture (DA) and Department of Environment and Natural Resources (DENR).

**Guide question: How do we address the constraints, if any?**

Men and women should have equal access to support services provided by the government. However, gender bias might be encountered in the provision of credit because of the perception that women are less creditworthy than men. This calls for affirmative action to improve women's access to credit.

**Guide question: What are the expected direct negative impacts of the policy/strategy?**

One possible negative impact is a decline in the production of staple crops particularly rice, which could threaten food security.

**Guide question: How do we address the negative impact?**

It should be clarified that crops diversification refers to two main cropping strategies, i.e. planting alternative crops after main crops (crop rotation), and planting one or more crops in between main crop plantings (intercropping). Diversification increases the productivity of the land and the income derived from it without abandoning the main crop such as rice. It should also be noted that policies and strategies in the plan still include increasing the

production of traditional crops particularly rice, corn, coconut and sugar. Moreover, shifting to the production of commercial crops should not threaten food security since the increase in income from the production of high value crops would enable farming households to purchase rice or other staple products coming from sources other than domestic.

**Guide question: Are there other policies (macro, sectoral) that could impact on this policy?**

Government policies that directly and indirectly affect crops diversification are

- pricing policy;
- policy on public expenditure; and
- agrarian reform.

In particular, low support price for rice, increased investments in research and development and rural infrastructure facilities, and achievements in the land reform program encourage farmers to engage in the production of high value commercial crops.

## **Gender Impacts of Trade Liberalization<sup>26</sup>**

Trade liberalization can have several positive impacts. These include

- increased output and employment;
- specialization;
- wider access to production factors and to intermediate and consumer goods at lower prices;
- expanded market opportunities;
- greater opportunities to exploit economies of scale;
- increased efficiency due to competition;
- greater transfer of technology;

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<sup>26</sup> By Carolina J. dela Cruz and Marlene L. Tablante, both Supervising Economic Development Specialists, Trade, Industry and Utility Staff, National Economic and Development Authority. Prepared and presented during the Writeshop on Developing Guidelines for Formulating Gender-Responsive Development Plans, 28-29 November 2000, SEAMEO-INNOTECH, Quezon City.

- increased inflow of foreign direct investment (FDI); and
- increased availability of foreign exchange.

Trade liberalization, however, can also have negative impacts. These include

- retrenchment of workers/increased unemployment resulting from the closure of certain industries severely affected by liberalization;
- exploitation of labor, misuse of natural resources; and
- outflow of profits (\$).

Trade liberalization can have impacts specific to women relative to men in a number of dimensions, i.e., women as supplier of labor inputs, as producer of goods and services, and as consumers. The potential impacts are as follows:

***Women as suppliers of labor inputs***

- More labor-intensive industries employing mostly women
- Wider opportunities for employment, more work choices, higher wages
- Multiple burden of workers with families
- Abusive and exploitative work conditions
- Dislocation of women workers specifically in manufacturing and agriculture (where women form 45% and 50%, respectively, of workers)
- Migration of workers to urban areas or overseas

***As producers of goods and services***

- Increased sales of products resulting in increased income
- Access to modern technology
- Reduced cost and wider choice of imported inputs
- Removal of price distortions which may involve reduction in input subsidies and increase in cost of credit resulting in reduced profits

***As consumers***

- Wider choice of consumer goods
- Reduced prices of goods and services due to greater availability

### **Guide questions**

- What are the impacts of trade liberalization?
- What are the sectors most affected?
- What policies should be pursued to mitigate the adverse impacts of trade liberalization?
- What are the gender-related effects of these impacts and policies?

## ***Gender and the Liberalization of the Telecommunications Industry***<sup>27</sup>

### **Beginnings**

Government allowed the telecommunications industry to liberalize because of the sorry state it was in. The effort to expand the coverage of telephone services in the country began with the granting of licenses to new operators in previously monopolized sector-international gateway facilities (IGF), cellular mobile telephone systems (CMTS), paging and cable television. The industry moved even faster with the enactment of RA 7925 or the Public Telecommunications Policy Act, which injected vibrancy into the industry. Teledensity, the number of telephone lines per 100 people, now stands at 9.12, from 2.01 in 1995.

### **Which sector will be affected?**

With expansion comes competition. Today there are 69 private telephone companies, nine IGF operators, five CMTS operators, and 11 paging companies. This is in stark contrast with the situation in 1989, when Philippine Long Distance Telephone Company or PLDT was the sole operator of IGF and CMTS.

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<sup>27</sup> By Jasper Solidum, Chief Economic Development Specialist, Infrastructure Staff, National Economic and Development Authority.

Numerous foreign investors also entered the industry by forging partnership with local companies (foreign firms can own up to 40% of a telecommunication company). Among those who have come in are Singapore Telecom, Korean Telecom, Nippon Telephone and Telegraph, Telia of Sweden and Nynex of the US.

The influx of telecommunication carriers has attracted more investors to the country. Telecommunications service has become a vital part of commerce and industry. Trade, for instance, requires the coordination of numerous activities such as effective buying and selling, and the continuous supply of up-to-date information on the availability of prices and services. The communication requirement for trade and industry has been met by efficient telecommunications services.

## **What are the gender impacts of the program?**

**Employment opportunities.** The liberalized telecommunications industry is helping lead the way for new economic opportunities and the creation of high-paying jobs for women. Computers and advanced telecommunications have become essential tools in the workplace, and this is expected to increase the demand for women in the workforce.

**Social benefits.** The social benefits of having modern telecommunications facilities are tremendous. Telecommunications allow rural and remote communities to have access to health care specialists in urban medical centers. They also expand the reach of education such as distance learning, and enable the sharing of information resources among schools, libraries, mass media and other institutions. Wider information dissemination translates into a better-informed citizenry with a higher awareness of health concerns, environment concerns, legal rights, income opportunities, gender issues, political issues and other vital matters.

**Time-saving.** Telecommunicating is the most widely recognized trip-saving application. With telecommunications, office-based employees, especially women, can work in their homes for a few days each week instead of commuting, and use the time saved for other productive activities at home.

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# Annex

## Annex A Identifying Gender Issues by Sector

Using the World Bank (2001) framework, where gender equality is defined in terms of

- equality in rights
- equality in command over productive resources
- equality in voice

one could identify a number of gender equality issues by sector or across sectors.

First, equality in rights applies to the right

1. to own land;
2. to manage property;
3. to conduct business;
4. to travel;
5. to be free from physical harm and violence; and
6. to be free from security risks (risk of domestic violence and conflict, physical and cultural isolation and marginalization).

Equality in command over productive resources includes

1. equality in access to education;
2. equality in access to land;
3. equality in access to information, e.g., agricultural extension;
4. equality in access to financial resources (credit);
5. equality in access to health (including reproductive health) and nutrition services;
6. equality in access to public services (other than health, nutrition and education);
7. equality in access to time resources (time burden); and
8. equality in access to productive employment and remunerative work (wage gap, occupation, and type of work)

Finally, equality in voice includes

1. equality in resource allocation and investment decisions in the home;
2. equality in resource allocation and investment decisions in the community;

3. equality in resource allocation and investment decisions at the national level; and
4. equality in political decision making at the national and local levels.

Another approach to identifying gender issues is shown in Table 1 below.

**Table 1:  
Gender issue, indicator and policies to address gender issue**

<b>Gender issue variable</b>	<b>Indicator</b>	<b>Policies</b>
Time budget (time burden)	Time allocation of women and men on different activities (home production, market production, wage employment)	Better access to transport facilities; water supply; labor saving devices
Employment	Labor force participation rate, employment rate, unemployment rate; employment by occupation; employment by type of worker; wage gap between women and men	Policies and programs to reduce time burdens; labor market legislation protecting women
Productive assets	Ownership of land and other productive assets (capital, technology); access to financial resources (credit); access to information related to production (e.g., agricultural extension)	Property rights legislation; eliminating legal barriers to ownership of assets and access to credit; microcredit programs
Education	Schooling participation; completion; educational attainment; learning achievement; literacy	Scholarship programs; policies to reduce time burdens
Training	Access to training programs	Vocational training opportunities; apprenticeship programs
Health and nutrition	Access to health and nutrition services; morbidity, nutritional and mortality indicators	

Personal security	Violence against women	Gender awareness programs for police and prosecutors, judges and lawyers, and professionals, e.g., health providers, counselors
Decision-making	Participation in decision making bodies at national, local, and community levels, in government and non-government organizations	

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