



Helpdesk Research Report

Gender in Political Economy Analysis

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Question

How is gender incorporated in political economy analysis, and which tools are used to do this?

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1. Overview

This report provides a brief examination of how and where gender analysis is incorporated into Political Economy Analysis (PEA). An initial review of the literature indicates that **gender is not systematically included in PEA**. This was also conveyed by a number of experts consulted for this report, who stated that few if any PEAs to their knowledge had included a gender analysis, with the issue usually treated only in passing. The report nevertheless highlights the existing examples of gender-oriented analytical questions used in common PEA tools. It also identifies areas of overlap between gender and political economy analysis.

PEA explores the political and economic processes in societies to provide an in-depth analysis of the power relations between groups. Gender analysis explores the power relations between men and women, and often frames this as explicitly political. It is generally acknowledged that inequalities and marginalisation contribute as drivers of conflict and crisis and must be taken into account in PEA (expert comments). Despite these areas of overlap, gender issues do not feature prominently in applied PEA or PEA frameworks. This report begins with a short summary of the benefits of including gender in PEA, drawn from the case studies in the report.

This report takes a practical approach and lists the gender-focused questions found in common PEA tools. These are only a small proportion of the total questions asked in a PEA. Although PEA policy and guidance notes do contain some gender questions, this is rarely reflected in the degree to which gender features in completed PEA studies. The report then provides some case study examples from the last decade which took a gendered perspective. These examples provide some models of how gender can be included, and the kind of insights it reveals. Most of the examples are of PEAs undertaken at the country level, rather than regional or sectoral. The final section of the paper identifies gender tools which overlap with areas of PEA interest.

The few PEA studies identified that do incorporate gender focus on the following:

- **The role of gender in society:** e.g. gender equality in formal and customary law, women's property and business ownership.
- **Women in positions of power and influence:** e.g. how many women sit in parliament, how many are business or civil society leaders.
- **Representation and influence of women's groups:** e.g. whether lobbying groups exist for women's rights, and their success.

Feminist scholars include these issues but are additionally concerned with how political economy impacts men and women differently, whether men and women are differentially able to access power – including patronage networks –, influence institutions, and how gender dynamics contribute to or block change (Petersen, 2005). These issues do not appear to be addressed in the PEA studies found for this short report.

2. Benefits of applying gender to PEA

Griffin (2007) highlights some of the ways in which gender analysis can contribute to political economy analysis:

- It adds a layer of analysis which creates **more accurate understandings** of intra-household labour and resource allocation at the micro level, and capitalist accumulation at the macro level. For example, Malaysia's economic success has relied on institutionalising gendered and racial inequalities, by recruiting female migrants with lower social capital and higher vulnerability, and paying them a lower wage than men.
- **Gender identities are (re)produced by the processes of political economy**, which means it is continually useful to look at how these processes affect people differently.
- **Certain sectors are defined in gendered terms** – 'women's work' or 'men's work'.
- **Making women visible reveals the overt sexism and male-centric vision** of development and political economy, and thus contributes to the analysis of political and economic processes.

Further, Fritz, Katayama, and Simler (2008) from the World Bank describe how inequalities both horizontal and vertical should be taken into account in political economy, which naturally includes gendered inequalities. In the case studies collected for this report, several benefits of including gender were visible:

- Men and women are groups with different interests and motivations.
- Obstacles to reform are sometimes gendered.
- Informal politics and power of programming can be highly gendered.

3. Incorporating gender into PEA

Key concepts

PEA aims to “situate development interventions within an understanding of the prevailing political and economic processes in society – specifically, the incentives, relationships, distribution and contestation of power between different groups and individuals” (Mcloughlin, 2009: 5). The language used in PEA is similar to the language used in gender analysis and there are clear areas of overlap. Gender is often described as unequal power relations between men and women (e.g. Baden & Reeves, 2000: 2; WDR 2012: 4). Haider and Rao note (2010) in their review of PEA that gender is a key aspect of power relations.

Gender has been included in political economy analysis either as how men and women are differently affected by and affect the political economy, or how masculinity and femininity are produced by and produce political economy (Petersen, 2005). While the former understanding of gender has become more evident in analysis in the last ten years (adding women and ‘women’s issues’), there is still considerable resistance to the latter and the theoretical implications of feminist political economy scholarship (Petersen, 2005).

Griffin suggests that gender is largely trivialised in International Political Economy as a category of analysis which pertains only to women and women’s issues, rather than a central way of understanding the global political economy (Griffin, 2007). This review of PEA frameworks showed that few contained the terms ‘gender’ or ‘women’. Where there was mention, it was mostly around the numbers of women included in formal processes such as elections and in parliament, missing a more nuanced analysis of gender relations. According to comments on a post on Duncan Green’s From Poverty to Power blog, a workshop on ‘thinking and working politically’ reportedly contained little, if any, feminist analysis¹.

The analytical understanding of gender as a system which shapes how we think, what we know, and what we value, is marginalised in mainstream political and economic analysis, despite the high quality of feminist scholarship (Petersen, 2005). Petersen states that in 2005, the structural privileging of men and masculinities was largely ignored in political economy analysis (Petersen, 2005). There is, however, a strong tradition of feminist political economy analysis.

The following section looks at four of the most commonly used PEA tools, and draws out where gender is emphasised in them, including sample analytical questions where possible.

¹ <http://oxfamblogs.org/fp2p/thinking-and-working-politically-an-exciting-new-aid-initiative/>

SIDA's power analysis

SIDA's power analysis tool focuses on the distribution of formal and informal power between actors and institutions (Haider & Rao, 2010), and explicitly adds a socio-cultural dimension to its analysis (Pettit, 2013). Haider and Rao note (2010) that it is important to have gender expertise in the analysis team. Pettit (2013) advises that analysts explicitly ask:

- How do gender norms reinforce power relations?
- How does gender intersect with the distribution of formal and informal power in society in terms of the public sphere (political institutions, social institutions, rule of law, the market and economy) and the private sphere (domestic life and family, intimate relations)?
- What can be said about both the situation of women-in-general and about particular groups of women (such as women who do not co-habit with men, whether they be single mothers, widows, non-married women), as well as about particular groups of men who may be disadvantaged by dominant ideas about masculinity?
- Is legislation gender neutral, or do particular laws reinforce and sustain subordinate or discriminated gender roles?

Some questions are explicitly framed as gender analysis, for example, these have been included in recent SIDA studies (Haider & Rao, 2010):

- How is formal and informal power distributed in society (according to gender)?
- What types of hidden dimensions of power exist, especially but not only, relating to gender?

Further examples of questions which are clearly related to a gender analysis (or social exclusion analysis) but not explicitly referred to as such are (Haider & Rao, 2010):

- What kind of formal and informal power is being exercised, how is it exercised and how is this understood or perceived, and by whom?
- Who sets the policy agenda?
- How do power relations/connections affect the positions people occupy?
- How do power relations shape policy outcomes?
- How do belief systems and cultural practices legitimise and reinforce material power structures?
- Which are the major conflicts of interests related to power/powerlessness, politics of poverty and democratisation processes?
- Which groups tend to be un-prioritised?

Strategic Governance and Corruption Analysis (SGACA)

This tool looks at: the foundational factors which shape the political and economic system; the rules of the game (formal and informal institutions); and the here and now, which reviews the current context, actors and stakeholders. Within the foundational factors section, Unsworth and Conflict Research Unit (2007) advise that gender is included in the questions about social and economic structures.

The institutions section contains several gendered questions (Initiative for Peacebuilding, 2008; Unsworth & Conflict Research Unit, 2007):

- The formal framework: Is gender equality safeguarded by law?
- State-society relations: Do interest groups make demands based on ethnicity or other exclusive criteria, or on the basis of universal human rights?
- Gender: Are there formal legal provisions that lay down distinctions between men and women, such as on land, inheritance rights, access to capital etc.? What are the laws and customary rules on marriage and divorce?

Under the here and now section, analysts are advised to ask the following gendered questions:

- Actors and stakeholders: Which groups have the capacity to act and make their voices heard? What issues are groups organising around – e.g. gender equality?
- How exclusive is the political elite (in terms of its socio-economic or institutional base, rate of turnover of individual members, accessibility / social mobility, gender inclusivity)?
- How far are ordinary people able to vote / join political parties, or access other means to exert political influence? Are particular groups excluded (legally, or in practice)? What disparities exist as between men and women?
- What are the gender-specific disparities as between men and women as regards economic (in)security, access to finance and roles in the social, economic and political life? What are the informal issues that determine, for example, political participation and access to land/financial services/employment for women?
- How are different non-state actors supporting the gender-sensitive improvement of state-society relations, if at all? To what extent are they winning the backing of power-holders in government and among traditional rules? What changes are emerging?
- What are the different experiences and needs of men and women in accessing state services and pushing for government to open up access to economic opportunity and decision-making positions? What are the specific challenges for women in getting their concerns acknowledged and addressed, especially when linked for security-related issues such as sexual and domestic violence?

DFID's Drivers of Change (DOC)

An example of how gender can be integrated into DOC reports is a study of Ethiopia conducted for DFID's Girl Hub by the IDL group in 2012, which explicitly looks at the drivers of change for girls (Healy, Teferra & Gibson, 2012). This paper provides a country-level analysis of the social, political and economic context of Ethiopia, drawing out the people and institutions which most influence girls' lives (p.viii). This combines established forms of gender analysis and political economy analysis to produce a nuanced picture of the country with a focus on the political economy aspects which affect gender relations. For example, it identifies that women and children's position in society is treated as a development issue rather than a rights-based one, and that Women's Associations can be powerful actors. The most active driver of change for girls is the government, which authoritatively pushes for girls' education and ending child marriage, punishing those who resist; economic factors are the next most important in delivering or blocking positive change. This focus on who and which institutions can drive change for girls demonstrates how the PEA tools can be used to look at gender issues.

Another example of a DOC which considers some aspects of gender is the Malawi study conducted by the Overseas Development Institute (ODI) in 2006 (Booth et al., 2006). This report identifies gender as a key

differential of power relations and an embedded social construct which mediates how power is controlled. Gender is used to maintain power hierarchies and is a persistent feature of Malawi's political system, resulting in disempowerment and impoverishment of women. This paper highlights gender dynamics as a core aspect of social structure which must be taken into account in PEA.

A final example is the DOC on Kenya from 2004 (Ng'ethe, Katumanga, & Williams, 2004), which includes a section on gender under 'Institutions and pro-poor change'. As above, this section provides a gender analysis of the social, political and economic situation in Kenya, mainly focusing on women's roles in each sector.

Problem-Driven Governance and Political Economy Analysis² (PGPE)

PGPE, used by the World Bank, focuses on particular challenges or opportunities (Haider & Rao, 2010). It has three clusters of drivers: structural, institutional and actors. Denney and Domingo (2013) note that problem-focused PEA allows a multidimensional approach, which facilitates the inclusion of gender analysis. They highlight that PEA and gender analysis are complementary.

Case studies

An example of a PEA conducted with a gender perspective is Tilitonse's PEA of mining in Malawi, which looks at the **gender specific issues of the mining sector**, in addition to the more usual institutions and policy analysis (Tilitonse, 2013). The report identifies that there are no policies in place to enhance and support the role of women in mining, and the broader mining policies from the government are not gender-sensitive. The government in fact refused to support a women's mining association's application for funding. The PEA identified key stakeholders who could lobby the government for a revised gender-sensitive mining policy, those who might be against it, and potential actions to take. Where there have been consultations between mining investors and the community, the report notes that women's voices are often stifled, and the 'community' which is represented to investors is primarily male. For example, in one consultation investors asked whether the community would prefer to receive cash compensation for relocation or to have houses built for them; women said they would rather have houses as cash may be spent by men for other purposes, but this viewpoint was silenced by the community chief. Therefore men and women are identified in the PEA as groups with different interests and motivations.

Denney's (2011) PEA of a **women's justice programme in Sierra Leone** incorporates a gender perspective. Family Support Units (FSUs) were established in Sierra Leone to handle crimes involving women and children, to make the police force and justice systems more accessible to these sectors of the population. This paper uses PEA to show they are not as successful as commonly asserted in the literature. There are high costs for women to use the FSUs, if they need to pay for travel to a doctor, to the FSU, and to the courts, lost earnings, medical costs, and cost of hiring a lawyer. Informal justice is perceived by women as cheaper, more familiar and therefore more accessible. FSUs have to engage with these institutions to make progress in their goals. This PEA highlights the gendered obstacles to reform of the justice system.

Jones and Holmes (2011) provide a sectoral political economy analysis of the **gender issues in social protection**, drawing on a multi-country study. They demonstrate that social protection policies and

² World Bank experts confirmed that gender is not systematically integrated in this tool, as there are standalone gender analysis tools which can complement PGPE.

programmes are influenced by institutions, interests and ideas, but that the role of gender in shaping the three 'is' is generally overlooked. They note that much social protection in developing countries has a clientelistic way of working, which is very often linked to patriarchy. This means the informal politics and power of social protection programming is highly gendered, revealed through the political economy analysis. They also highlight that the interests of bureaucratic agencies can have an impact on gender equality; if a ministry of women or social affairs is in charge of the social protection programme, it is more likely to include gender equality goals than a ministry of finance or rural development.

A country-level PEA conducted by Norad on **good governance in Nigeria** contains a gender assessment (Amundsen, 2010). This takes the form of a gender analysis of political and social inequality between the sexes with a particular focus on women's position in formal politics and ability to participate in elections as candidates and voters. This is an example of how a gender analysis can be integrated with PEA by using separate gender analytical tools.

4. Gender analysis tools

This table lists a selection of gender tools which have some overlap with the main issues of PEA: power structures, institutions, informal politics, stakeholder beliefs and incentives.

Title	Link	Information
Social Institutions and Gender Index	http://genderindex.org/content/team	SIGI measures the underlying drivers of gender inequality in social institutions. It provides annual country-level data on Discriminatory Family Code, Restricted Physical Integrity, Son Bias, Restricted Resources and Entitlements and Restricted Civil Liberties. These numbers can easily be integrated into a PEA which analyses institutions.
World Bank guidance note on Gender-Responsive Social Analysis	http://commdev.org/files/1472_file_GenderGuidanceNote.pdf	This comprehensive note covers why gender is important, analytical frameworks, and reviews of gender within institutions, rules and behaviour, stakeholder analysis, and participation, and explains how to monitor and assess gender in projects and programmes.
UNDP's Institutional and Context Analysis	http://www.undp.org/content/dam/undp/library/Democratic%20Governance/OGC/UNDP_Institutional%20and%20Context%20Analysis.pdf	This tool has a strong focus on gender as a way of shaping actor's beliefs and incentives and influencing their choices. Many of the main concepts complement or could be used in PEA.
DFID Research. Guidance Note on Gender Mainstreaming and Social	http://www.abdn.ac.uk/sustainable-international-development/documents/GuidanceNote_Gender_	This short document outlines why it is important to consider gender in research and tools for how to include it. Tools include sex-disaggregated data, gender-sensitive indicators,

Exclusion in Research	SE.pdf	and gender analysis.
UNFPA's Environmental Scanning	[paper available on request]	This tool is similar to PEA in that it reviews the political, economic and socio-cultural context. UNFPA have used ES tools to examine gender relations, which could be similarly adapted for PEA.
OECD-DAC Network on Gender Equality	http://www.oecd.org/dac/gender-development/_%20Issue%20Brief%207.pdf	This Issues Brief sets out ideas and lessons from OECD processes in incorporating gender into policy and political dialogues with partner countries. It references influencing power dynamics, actors' behaviour, and institutions, showing clear overlap with PEA. It contains guidelines on how to discuss and include gender.
Six Domains Gender Analysis	http://zunia.org/sites/default/files/media/node-files/us/213998_usaid_gender_equality_toolkit_final.pdf	Tool for looking at gender in six areas of social life: (1) access to assets, (2) knowledge, beliefs and perceptions, (3) practices and participation, (4) space and time, (5) legal rights and status, and (6) power.
DFID Gender and Social Exclusion Analysis How To Note	http://www.gsdr.org/docs/open/SE9.pdf	This guidance note suggests a structure, methodology and analytical framework for a Gender and Social Exclusion Analysis (GSEA). A GSEA examines who is excluded, plus the processes, impacts and implications of gender inequality and social exclusion. DFID country offices should carry out a GSEA before preparing a Country Governance Analysis and as part of the country planning process.

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<http://siteresources.worldbank.org/INTWDR2012/Resources/7778105-1299699968583/7786210-1315936222006/Complete-Report.pdf>

Key websites

- Eldis – Gender section: <http://www.eldis.org/gender#.UtaQ5tJdUuw>
- Bridge – Gender: <http://www.bridge.ids.ac.uk/>
- GSDRC – Gender Topic Guide: <http://www.gsdr.org/go/topic-guides/gender>

- GSDRC – PEA Topic Guide: <http://www.gsdrc.org/go/topic-guides/political-economy-analysis>

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