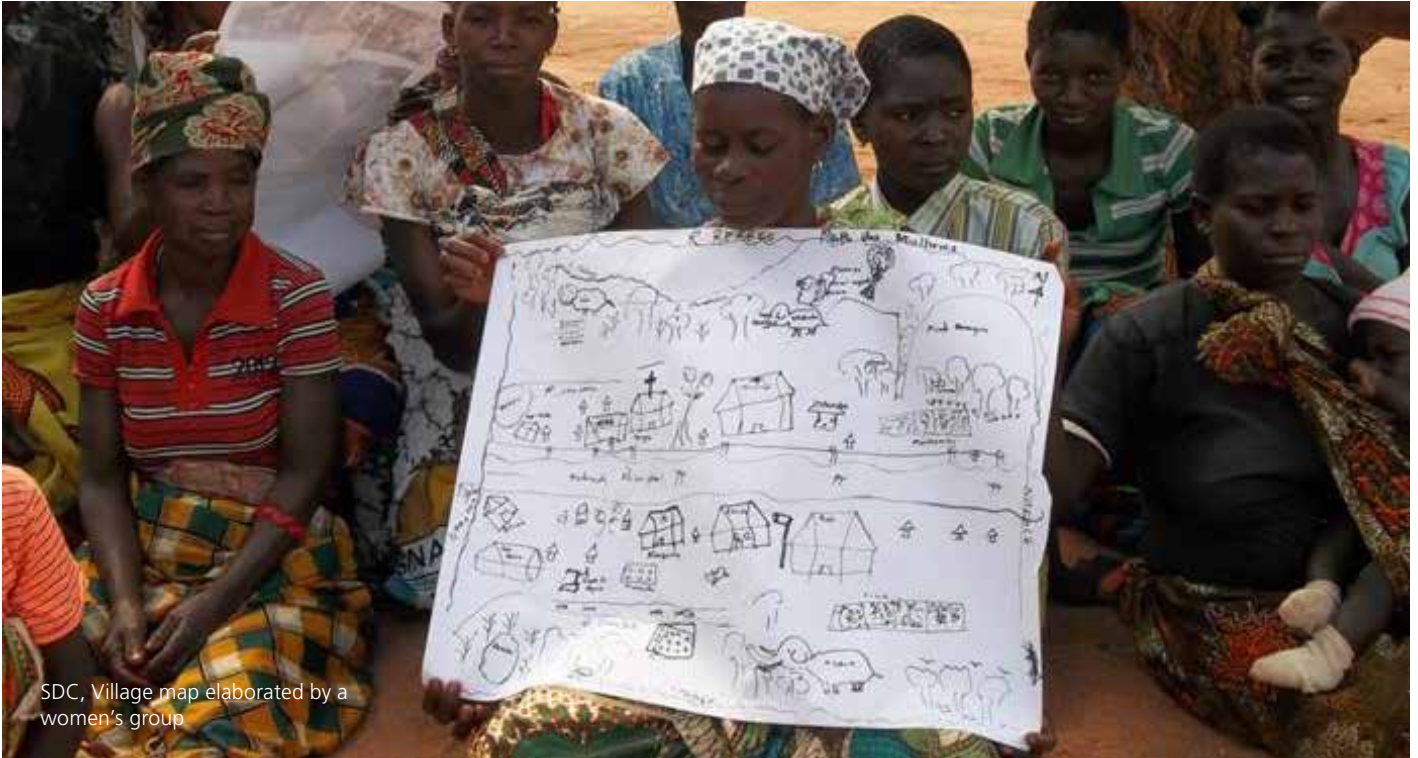


# How to Do a Gender Analysis



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

Swiss Agency for Development  
and Cooperation SDC



SDC, Village map elaborated by a women's group

## I. Gender Analysis in SDC

The Swiss Agency for Development and Cooperation (SDC) is committed to promote gender equality in all areas of its work to ensure that women and men have the same rights to develop their potential and can use their resources in a meaningful way. The Agenda 2030 and the SDG 5 on Gender Equality and the Empowerment of Women and Girls guide our work. Promoting gender equality and sustainable development is only possible if we know where and why gender inequalities appear. Thus, the starting point

of any intervention is a gender analysis to understand its implications for women and men, and the obstacles and opportunities to promote gender equality and women's rights. A gender analysis is a key tool to achieve meaningful gender outcomes and promote sustainable development.

This how-to note provides a practical guide for conducting a gender analysis. It aims at SDC operational staff and SDC partners in Switzerland and in partner countries.

### Key questions to ask

1. What are gender inequalities and obstacles in your context?
2. What needs to change, what is the objective?
3. How can this objective be addressed in your intervention?
4. How can this objective be monitored and reported?

### What is it?

Gender analysis is a **systematic analytical tool** used to identify, understand, and explain the different **roles, needs, and opportunities** of men and women and the relations between them. It identifies inequalities in terms of power, resources and opportunities between women and men that exist in households, communities,

countries and different sectors. Moreover, it examines why these disparities exist, determines whether they are a potential impediment to achieving meaningful outcomes, and looks at how they can be addressed. A gender analysis makes a key contribution to the relevance, effectiveness and sustainability of development interventions.

## When do we do it?

Ideally, the gender analysis should be conducted before the start of a project or programme or the design of a new cooperation strategy and its domain of intervention. Whenever possible, gender is integrated as a transversal theme as a part of country,

sectoral or community analysis. A separate gender analysis is essential before implementing gender specific interventions. The results of the gender analysis inform the design of an intervention and its activities and form the base for a valid monitoring

and evaluation process. If it is not possible to conduct the gender analysis at the start of a project, it can be included in mid-term reviews or as part of an evaluation.

## Who does the analysis?

Who is conducting a gender analysis depends on the context, but a gender aware and competent team is vital (internal staff and/or external experts). If primary data is collected, for example for a baseline assessment, it is important that trained social

researchers oversee the analysis. Primary data, for instance at community level, can also be collected through participatory approaches involving and empowering project participants. When relying on secondary data – in case the collection of primary

data is not possible for a given reason – a gender specialist or someone with experience or training in gender analysis and implementation should be involved.

## What level?

A gender analysis can be done at different levels. At the **micro level**, the focus is on women and men, households and communities. Here, the analysis should focus on how to identify their specific roles, relationships, needs and priorities relating to their context, and how to examine the extent to which cultural issues are key. The focus at the **meso level** is on institutions. The analysis addresses how institutions operate in terms of service provision and implementation, whether they have gender policies and gender expertise, and whether there is an equal treatment of

women and men within an institution. The **macro level** refers to the policies and their implementation in partner countries and at international level. This includes

legislation and regulations. The analysis asks whether gender equality policies are in place, or how different policies influence the lives of women and men.

## What thematic focus?

To ensure that gender issues are taken into account transversally, an understanding of gender implications in different thematic domains or sectors is important. A domain (or sector-specific) gender analysis asks about key gender issues on policy and

SDC, Participative village assessment, Tajikistan.



operational level in a given domain. The [Thematic Gender Guidance Sheets of SDC](#) outline key issues and key questions of gen-

der equality in specific thematic domains and support conducting a valid gender analysis.

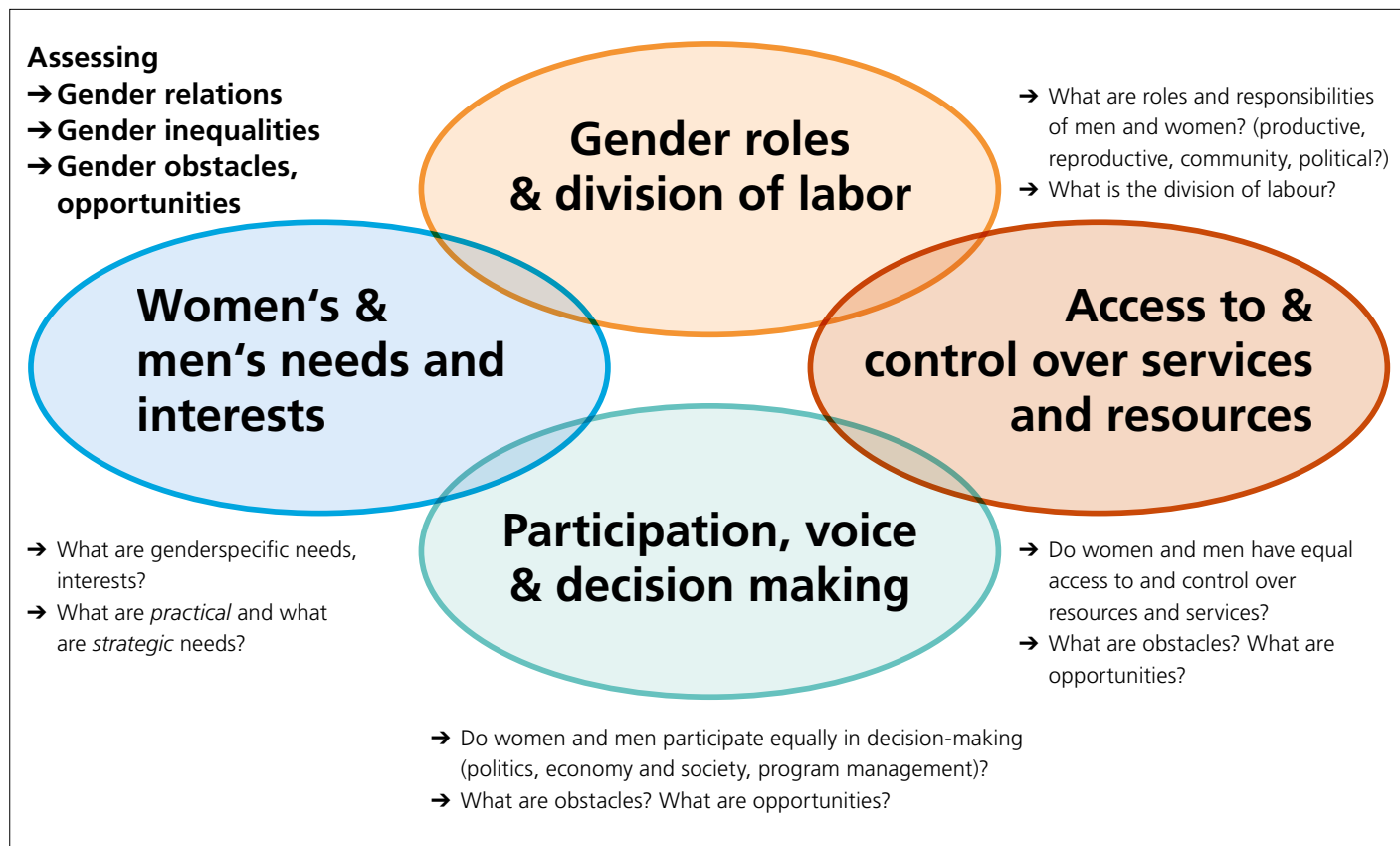
## II. Gender Analytical Framework

Gender equality can be assessed on the basis of four lenses: 1. Gender roles and division of labour, 2. Access to and control over services and resources, 3. Participation, voice and lead-

ership and 4. women's and men's needs and interests. These four lenses (see Figure 1) build the Gender Analytical Framework and are useful for the analysis of any given context.

The following scheme and table give an overview over the four lenses, the respective concepts and the related research questions.

Figure 1: The four gender lenses



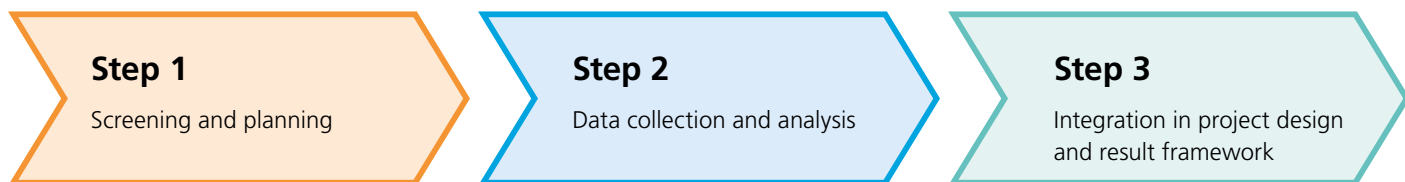
| Lens  | Questions   | Concept  |
|---|---|--|
| Gender roles + division of labour               | <ul style="list-style-type: none"> <li>• What are the roles and responsibilities of women and men?</li> <li>• How do men and women interact?</li> <li>• What do they do, what can they do, what are they expected to do?</li> </ul>   | <p>Women and men take on different roles and responsibilities in the household, in the school, in the workplace, in the community, in the political organisation, in the government, etc. The <b>productive role</b> relates to any work that generates an income or other economic resources. The <b>reproductive role</b> refers to work in the household, caring for youth or older people, cooking and cleaning. Reproductive work in general does not generate any income, it is less valued than productive work and often not considered as work. Women are generally the ones responsible for reproductive tasks which is reflected in the unequal distribution of unpaid care work between women and men.</p>   |
| Access to + control over services and resources | <ul style="list-style-type: none"> <li>• Do women and men have equal access to the resources required?</li> <li>• What are gender-specific obstacles to access these resources?</li> </ul>  | <p>Resources are means and goods, including basic services (education, health), <b>economic resources</b> (household income), <b>productive resources</b> (land, equipment, tools, work, financial services), <b>political resources</b> (capability for leadership, information and organisation), and <b>time resources</b>. Access to resources implies that women and men are able to use and benefit from specific resources. Control over resources implies that both men and women can obtain access to a resource and also make decisions about the use of that resource.</p>  |
| Women's and men's participation                 | <ul style="list-style-type: none"> <li>• Do women and men have equal rights, opportunities and capacities to participate in and influence decision-making (in family, society, politics, economics)?</li> <li>• Do women and men have equal voice and leadership opportunities?</li> </ul>                    | <p>Gender gaps exist in <b>participation and decision-making</b> in the household, at community-level, in politics and economics and in society at large. Women and minorities are often underrepresented in decision-making bodies, especially in civil society and politics. This means that they have little voice and influence in the distribution of means and political agenda-setting. Still, women's participation is not automatically associated with increased decision-making power for women. Equal participation requires equal representation (numbers) and the capacity and power to have influence.</p>  |
| Women's and men's needs and interests           | <ul style="list-style-type: none"> <li>• What gender needs are expressed easily/not easily in each role, by women and men?</li> <li>• What gender needs are directly linked to the project/programme?</li> <li>• What gender needs are context-specific (e.g., cultural values, traditions, etc.)?</li> </ul> | <p><b>Practical gender needs</b> refer to needs women and men have in terms of making everyday life easier (e.g., access to water, better transportation, child-care facilities). Addressing these needs will not directly challenge gender roles and power relations, but may remove important obstacles to women's economic and political empowerment. <b>Strategic gender needs</b> refer to shifts in society in terms of gender roles and relations (e.g., need for a law to condemn gender-based violence, equal access to credits, equality in terms of inheritance). Addressing these should impact gender power relations. Sometimes, however, the practical and strategic needs coincide, (e.g., the practical need to have a place to leave the children coincides with the strategic need to get a job outside the home).</p> <p>In principle, SDC aims for transformative changes towards gender equality by identifying and addressing strategic gender needs. However, the fulfilment of practical gender needs is a pre-condition. In humanitarian contexts, practical gender needs are critical and a first entry point for any intervention.</p> |

### III. How to: In Practice

A gender analysis in the development context addresses a wide range of issues and makes use of different tools and concepts to better understand gender inequalities in

a given context. There is no blueprint and emphasis may be laid on different aspects of gender, depending on the focus of the intervention. The following is a step-by-

step guide with suggestions, which can be combined and used in different ways.



#### 1<sup>st</sup> step: Screening and planning

In order to be useful, the gender analysis should be **focused**. Therefore, it is important to identify the relevant gender issues at the specific level when designing the analysis and to specify the target group to be analysed. To ensure the relevance of the collected information and to give the analysis a realistic scope, SDC and its key partners ask themselves:

**What do I need to know** to ensure that the planned intervention benefits both women and men and promotes gender equality?

Who are the **target groups**?

Are the target groups women and men or do I have to integrate other **social categories**?

- It is important to be specific about the **target group**. Not all women and men are the same. Gender is a social variable which crosscuts with other **social categories** (intersectional approach), such as age, ethnicity, class, religion, disability, sexual orientation and others. For example, a woman is never merely a woman but always has a certain ethnicity, class, age, etc... This implies that answers to the question «who» are systematically disaggregated between different genders in terms of other variables.

#### 2<sup>nd</sup> step: Data collection & analysis

Do I **need to collect data** (primary data) **or can I rely on existing information and statistics** (secondary data)? Do I need support from an external, local expert?

Can I integrate gender questions in other analysis, assessments conducted by the program, or do I need to conduct a separate gender analysis?

What data and information are needed to align with the SDC **monitoring & reporting** system (Gender Reference Indicators)?

- **Participatory approaches** (as a form of qualitative and primary data collection) can be used to conduct gender analysis on community level, e.g., as part of a beneficiary assessment. Participatory approaches actively involve and empower stakeholders in data collection. For example, time use diaries do not only provide data, but are an instrument for awareness raising which can lead critical reflections on the existing division of labour and responsibilities and promote actions for transformative changes. Such participatory processes need close facilitation and guidance. As an example, see [‘Unpaid Care Work’: Practical Guidance on Analysis and Intervention Design](#).

sex-disaggregated data (i.e. statistics that give information about the percentage of women and men participating in the labour market). When relying on secondary data, a gender specialist or someone with experience or training in gender analysis and implementation should be involved.

- **Primary data** collection is needed if specific gender results are expected. For the collection of primary data, for example in the geographic area of the project, project participants have to be interviewed. In this case a quantitative (survey-based) and/or qualitative (interview-based) data collection is needed. If primary data is collected, it is important that trained social researchers are overseeing the analysis.

- **Secondary data** are already available, e.g., from studies, statistics or strategies compiled by the partner or other donor organisations. [CEDAW country reports](#) can also be an important source. These data describe the situation with regard to gender equality at the national or regional level, within the sector, in the partner organisations or at the target group level. It is important to look for and explicitly ask for

- **Integrating a gender analysis in other assessments**: Whenever possible, **gender is to be integrated** in other country, sectoral or community-based analyses and beneficiary assessments. At times, it is necessary to carry out a **specific gender analysis** to complete a prior diagnose or when specific gender data is needed for a particular geographic area, sector or intervention. However, a specific gender analysis is essential and required before implementing gender-specific interventions and programmes.

- The SDC has introduced **Aggregated and Thematic Reference Indicators (ARIs, TRI's) as a guidance for SDC's monitoring and reporting**. These indicators should be taken into consideration when establishing a gender data collection.

### 3<sup>rd</sup> step: Integration of new results in project design and result framework

What are the **gender issues and inequalities identified in the analysis?**

Based on these findings, what are the changes and objectives I want to achieve through the project?

How do I integrate these objectives in the **project design and result framework?** (On output, outcome, impact level?)

- If the results of the gender analysis show gender disparities or significant gender differences, this new gained knowledge should be included into all stages of the intervention's project cycle management (PCM), especially into the design and the result framework. Also, objectives and indicators should be adapted.
- **Develop strategies** to address gendered barriers and constraints and include these strategies into the implementation. Ensure that these activities are adequately resourced.
- **Identify ways to monitor and report gender-related outcomes or impacts:** Develop and incorporate methods to track changes in gender equality, to track key indicators related to important gender issues and monitor and report the **Gender Reference Indicators**.
- **Shape the strategic and operational planning of projects, programmes or policies:** Incorporate a Women's and Human's rights perspective into the development of long-term interventions and strategies to achieve gender equality. The CEDAW country reports can be an important guidance to strengthen a Women's Rights perspective.
- **Identify capacity building needs** of staff, implementing partners and other important stakeholders (e.g., governmental counterparts).
- **Engage in a policy dialogue** with governments, international actors and civil society for broader change to empower women, address strategic gender interests and promote gender equality.

## IV. Lessons Learnt and Good Practices

A gender analysis reveals gender inequalities and enables development practitioners to address and develop together with the target group adequate measures, ensuring the "do not harm" principles, and identifying strategies to promote gender equality through development interventions. Conducting such an analysis is challenging. Development practitioners may face resistance to change gender relations and also deal with methodological challenges, for example in data collection and analysis.

### What are the challenges in doing a gender analysis?

- A gender analysis often addresses sensitive topics, e.g., gender-based violence, the transformation of established gender roles and norms, religious beliefs, etc. A gender analysis may face resistance and

can lead to harm and backlash if not done in a careful and conflict-sensitive way.

- Doing a gender analysis can be time and budget consuming, especially if an in-depth analysis with an external expert is conducted.
- To get valid primary data, specific scientific knowledge (methods, data analysis) is needed.
- Secondary data (national and regional statistics and reports) on gender is not always reliable and other thematic statistics are often not disaggregated by sex.

### What are the good practices?

- The first step is to recognize gender inequalities and to become aware that

gender equality is a key for sustainable development, inclusive economic growth and poverty reduction.

- A detailed gender analysis should include time-use data.
- A participatory approach is well suited for a gender analysis.
- The gender dimension has to be implemented into all stages of the project cycle management (PCM) to reduce gendered barriers and constraints at all levels (micro, meso and macro).
- The gender dimension has to be implemented into the result framework and has to be monitored and reported (ARIS).

## Good Practice from Nepal

### What was the aim of the assessment?

To identify the division of labour, especially the unpaid care work and the key time-consuming tasks.

### How was it done, by whom?

Unpaid care work was analyzed in a two-step process by gender experts. First, information from female and male participants on how they use their time was collected. The method used for this is a time-diary. The second method used is

participatory reflection-action discussion group. The combined method emphasizes a process by which female and male participants themselves reflect on their own situation and take action individually and collectively.

### How did the findings inform the design of your program?

The findings show how much time the participants spend on childcare. Childcare is a key time-consuming task. Female and male participants discussed the research results

in their action-reflection group and came up with the idea to establish a child care centre in the community. After a lot of discussions at community, local government and district level, the determined women were able to establish a community child care centre, with an initial support from HELVETAS Swiss Intercooperation.

For more information: [Guidance Sheet Gender and Unpaid Care Work](#) and [Unpaid Care Work: Practical Guidance on Analysis and Intervention Design](#)

## Good Practice from Kyrgyzstan

### What was the aim of the assessment?

The Gender Scoping Study prepared within the local economic development project in Alay and Chon-Alay districts in Southern Kyrgyzstan aimed at defining strategies regarding women's economic empowerment implementation practice and taking a "snapshot" of the gender roles in this remote area. The report represented an effort of transcending the stereotyped notions of women's victimization and to understand the limitations for the empowerment of rural women in their daily lives in the studied villages. Key questions were: 1) Specifying gender division of labor and power in households, 2) Determining

economic, cultural and social barriers and limitations for involvement of women in the market system, including the aspects of access to resources, 3) Specifying gender perception on women's needs in the course of economic development; and 4) Determining the benefits/advantages and drawbacks for women in the course of economic development of communities and households.

### How was it done, by whom?

The study was done by a local research company; 7 researchers were involved. The research methods used were desk research, analysis of baseline data, semi-structured

participant observation in four villages, four focus group discussions (two in each district) and several case studies (on specific topics such as migration experience, divorce, disability, etc.).

### How did the findings inform the design of your program?

On the basis of the gender scoping study, the project developed a gender and social equity strategy, which contains problem descriptions and actions that the project can/will take to address them.

For more information, see [the research report](#) and the related [Bai Alai Gender Strategy](#).

## V. Links

[SDC Gender glossary and definitions](#)

[SDC How To: Gender in PCM](#)

[SDC Gender Reference Indicators](#)

[SDC Gender thematic guidance sheets](#)

[SDC Gender in Cooperation Strategies](#)

[SDC Gender in Practice Toolkit](#)

[SDC Gender Equality Shareweb](#)

[SDC Dispatch on Switzerland's International Cooperation 2017–2020](#)

This *how to note* was developed in cooperation with the Interdisciplinary Center for Gender Studies, University Of Bern ([www.izfg.unibe.ch](http://www.izfg.unibe.ch))