

**GENDER PAYS OFF!**



## Gender Analysis – Frequently Asked Questions

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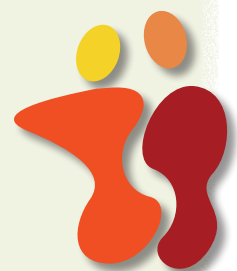
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## Table of contents

|   |    |
|---|----|
| At a Glance .....   | 4  |
| 1. What is the purpose of a gender analysis? .....  | 6  |
| 2. What results should a gender analysis achieve? .....   | 6  |
| 3. Do I have to conduct a gender analysis? .....  | 6  |
| 4. Will someone check whether I carry out a gender analysis? .....  | 6  |
| 5. When should a gender analysis be conducted? .....  | 7  |
| 6. What do I do if I haven't carried out a gender analysis before the ZAK meeting? .....  | 7  |
| 7. What should be the focus of a gender analysis? .....   | 7  |
| 8. Where can I find best-practice examples of gender analyses? .....  | 8  |
| 9. Who can I contact if I have questions? .....   | 8  |
| 10. Who should be involved in gender analysis? .....  | 8  |
| 11. How can I find suitable consultants to conduct a gender analysis? .....   | 9  |
| 12. What data collection and analysis tools can I use to conduct a gender analysis? ..  | 10 |
| 13. In what language should a gender analysis be written? .....   | 11 |
| 14. Is a gender analysis training course available? .....   | 11 |
| 15. We are committed to engaging in partner-oriented international cooperation.<br>Are GIZ's gender mainstreaming policies in keeping with this commitment? ..... | 11 |
| 16. Does our perception of gender equality conflict with the cultural identity of<br>our partner countries? .....   | 11 |
| 17. The programme partners are not interested in conducting a gender analysis.<br>Should we still proceed? .....  | 12 |
| 18. Do I still need to carry out a gender analysis even if a project/programme<br>has been assigned the marker GG-0? .....  | 12 |
| 19. How do I conduct a gender analysis for a regional programme? .....  | 13 |
| 20. How do I conduct a gender analysis for a sector project/programme? .....  | 14 |
| 21. What is Gender? .....   | 14 |

## At a Glance

### Gender analyses are mandatory

For many years now, the promotion of gender equality through gender mainstreaming has been a key strategy in international cooperation. Many of GIZ's commissioning parties are committed to promoting gender equality, and gender aspects play an important role in programming, designing and planning measures. For example, the commission award criteria of the German Federal Ministry for Economic Cooperation and Development (BMZ, 2001) clearly state that a gender analysis must be conducted at the start of a new bilateral development cooperation project.

Gender analysis is also a key priority within the framework of GIZ's gender strategy. Since February 2011, one of the aims of the approval of the offer design (ZAK) meetings is to review whether a gender analysis has been conducted during the appraisal and offer design stage and how the results have been integrated into the objectives system and into the methodological approach. If no gender analysis has been conducted, the ZAK committee stipulates that one be carried out.

### Gender analyses provide recommendations for the methodological approach and for the objectives system. They provide a basis for awarding the gender marker

In business with BMZ, GIZ complies with the criteria laid down by the OECD's Development Assistance Committee (OECD-DAC). These demand that the impacts that measures will have on gender equality must be assessed before the gender marker is awarded. This means that, ideally, a gender analysis should be incorporated into appraisals and be carried out before the commission is awarded.

Conducting a gender analysis should enable you to develop a gender-responsive objectives system and devise a methodological approach. Both are necessary to give equal consideration to the needs of men and women within the scope of projects and programmes and to make necessary adjustments to the monitoring system. A gender analysis should therefore present projects and programmes with recommendations for the objectives system and for the methodological approach. This means that a gender analysis provides a basis for assigning the gender marker. Even if a project or programme is deemed to have no gender relevance and is awarded the marker GG-0, the decision to assign this marker must be based on the results of a gender analysis.

### Gender analyses improve gender mainstreaming

A gender analysis isn't just a BMZ requirement; it provides a basis for systematically integrating gender into service delivery, and thus helps improve gender mainstreaming.

Although it is supposed to be carried out before the start of a measure, it may make more sense to schedule the analysis at a later stage or to carry out an additional, more detailed analysis. It is never too late! Even if the gender marker has already been assigned, there is often further scope for increasing the gender responsiveness of the strategies, approaches and methods used.

### **Gender analyses should deal with relevant issues**

In order to be useful, a gender analysis should focus on relevant issues. It doesn't have to cover every issue imaginable. Depending on the focus of activities, emphasis may be placed on different aspects of gender. It is therefore important to identify the relevant issues when the analysis is being designed. The issues to be addressed may be assigned to the following levels in an analytical framework:

- At the meta level, the focus is on issues related to gender norms in partner countries. In this context, it is important to take account of diverse and competing trends in society.
- The macro level addresses issues related to how policies in the partner country are designed, whether gender equality policies are in place at the national level, and the gender responsiveness of sector policies and strategies.
- At the meso level, the focus is on institutions – particularly the partner organisations – that operate in the cooperation landscape and how the project/programme relates to these institutions. Issues dealt with here include the equal treatment of men and women within a company and the gender-responsive design of value-creation processes, products and services.
- The micro level deals with the measures' target groups and gender-specific differences in socio-economic indicators in public and private life.

### **There is no blueprint for a gender analysis**

There is no one-size-fits-all approach when it comes to conducting a gender analysis:

- It can be integrated into appraisals or conducted on a stand-alone basis.
- It can be carried out before the start of a commission or at different stages of the project cycle.
- The information required by the stakeholders involved may vary widely depending on how they wish to use the findings of the analysis. For example, one stakeholder may wish to use them to award the gender marker whereas another may need the information for designing the offer or devising a methodological approach.
- Depending on the issues to be addressed, a gender analysis may be able to draw on existing secondary data and information from databases and publications of statistics offices, ministries and international organisations. Any existing data should be reviewed and incorporated before collecting primary data.

The human resources, time and funding required will vary, as will the length of the report, depending on how an analysis is designed.

### 1. What is the purpose of a gender analysis?

Gender analyses serve to record the current status of gender relations and identify causal links between results, against the backdrop of a clearly defined situation in a country/region and sector (core problem). It helps to identify the specific problems, objectives and potentials of women and men. A gender analysis should be used to provide recommendations for incorporating gender into the methodological approach and integrating it into the objectives system. Right from the planning stage, it enables well-founded conclusions to be drawn as to how a measure can contribute to promoting gender equality. It therefore makes a practical contribution to gender mainstreaming.

### 2. What results should a gender analysis achieve?

Conducting a gender analysis should enable you to develop a gender-responsive objectives system and devise a methodological approach, two prerequisites for giving equal consideration to the needs of men and women within the scope of projects and programmes and for making necessary changes to the monitoring system. A gender analysis should therefore produce recommendations for the objectives system and for the methodological approach to be pursued by projects and programmes. This means that a gender analysis provides a basis for assigning the gender marker. Even if a project or programme is deemed to have no gender relevance and is awarded the marker GG-0, the decision to assign this marker must be based on the results of the gender analysis.

### 3. Do I have to conduct a gender analysis?

In BMZ business, gender analyses are mandatory. The commission award criteria of the German Federal Ministry for Economic Cooperation and Development (BMZ, 2001) clearly state that a gender analysis must be conducted at the start of a new German development cooperation project as a matter of policy. Promoting gender equality is an important factor for many of GIZ's other commissioning parties too; however conducting a gender analysis is not a binding requirement. Since February 2011, approval of the offer design (ZAK) meetings for BMZ business therefore review whether a gender analysis has been conducted during the appraisal and offer design stage, and how the results have been integrated into the objectives system and into the methodological approach.

### 4. Will someone check whether I carry out a gender analysis?

Yes. The approval of the offer design (ZAK) form documents whether a gender analysis has been conducted for BMZ projects and programmes.




## 5. When should a gender analysis be conducted?

- Ideally, a gender analysis should be carried out before a project or programme starts and should be available for the approval of the offer design (ZAK) meeting.
- Depending on the specific focus and on the methodological approach adopted, a gender analysis can be part of the appraisal, or it can be made available to the appraisers for information purposes if it has been carried out in the run-up to the appraisal.
- If a gender analysis is not carried out during the appraisal or before the ZAK meeting, it can be conducted during the project term, and the project/programme can be reoriented if necessary to take account of the recommendations made.

## 6. What do I do if I haven't carried out a gender analysis before the ZAK meeting?

It is never too late to conduct a gender analysis in your project or programme! If you haven't carried out an analysis before the ZAK meeting, you should conduct one during the project or programme term, in order to ensure that measures, approaches and methods are designed gender-responsively.

## 7. What should be the focus of a gender analysis?



First and foremost, a gender analysis should be useful. In other words, it should gather information that allows gender issues to be systematically integrated into the objectives system and into the project/programme's methodological approach.

Depending on how a project/programme is designed, for example, at which intervention levels services are provided, a number of different factors may come into play in this context. Furthermore, the stakeholders involved may regard specific aspects as particularly relevant.

In order to secure useful results, a gender analysis should focus on issues related to project/programme design. An analytical framework that breaks gender issues down into the following four levels will prove beneficial in this context: The **meta level** encompasses issues related to gender norms in partner countries. At the **macro level**, a gender analysis deals with policy design aspects in the partner country. The **meso level** focuses on gender in institutions in the cooperation landscape, particularly in partner organisations. The **micro level** deals with the measures' target groups and gender-specific differences in socio-economic indicators in public and private life.

For possible questions that arise at these different levels, [see DMS](#) (in German only).

## 8. Where can I find best-practice examples of gender analyses?

Examples of good gender analyses are gathered by the gender officers in the divisions and uploaded to DMS.

- For best-practice examples of gender analyses conducted by Department 1, see: [see DMS](#)
- For best-practice examples of gender analyses carried out by Department 2, go to: [see DMS](#)
- For best-practice examples of gender analyses carried out by Department 3, go to: [see DMS](#)
- For best-practice examples of gender analyses carried out by the Sectoral Department, go to: [see DMS](#)
- Best-practice examples of gender analyses carried out by sector projects/programmes are filed under: [see DMS](#)

*Note: Gender analyses in the regional departments are still filed by country, not by sector.*

## 9. Who can I contact if I have questions?

If you have any gender-related queries, please contact the gender officer in your division or regional department at Head Office, or in the country in question (for country and department-specific questions). In some countries, there are gender officers at the programme level. Lists of the gender officers at headquarters and in the regional divisions are available [here in DMS](#).

## 10. Who should be involved in gender analysis?

To ensure that the results of a gender analysis are relevant to project steering, the officers responsible for the commission and partners should be closely involved in the process right from the design phase.

It is advisable to entrust implementation to people who have the required methodological expertise and who are familiar with both the country context and the gender context in the specific sector. If the gender analysis is produced by several people, it is advisable to form teams of mixed gender. Local resource persons and relevant institutions should also be involved.

The gender officers (from the Sectoral Department, your country or your regional division) should also be actively involved in the preparatory phase. We recommend that you incorporate the specialist know-how of gender experts in the Sectoral Department in an appropriate manner, in particular during project and programme design (for example, when drawing up draft offers and approval of the offer design (ZAK) forms) and when integrating gender aspects. The Sectoral De-



partment assumes responsibility for quality assurance with regard to gender when it is involved in the design process. When constructing hypotheses and defining the methodological approach for ongoing projects and programmes, it is advisable to actively involve the project/programme experts in order to promote the integration of gender into the methodological approach.

## 11. How can I find suitable consultants to conduct a gender analysis?

The names of consultants who specialise in the field of gender are stored in a database set up by BMZ and the sector programme Promoting Gender Equality and Women's Rights. The database allows you to search for gender experts with specific skills or with experience in a particular sector or region, allowing you to find the person who best suits your requirements.

For more information, see [www.gender-consultants.net](http://www.gender-consultants.net).

What must I take into account when drafting terms of reference for consultants?

- The terms of reference play a key role in the success of a gender analysis, particularly when assigning external consultants. They should be drafted to clearly reflect the **desired objectives** and **contents** of the gender analysis, against the **backdrop** of the specific context. The following aspects should be taken into account:
  - Should gender-differentiated data be collected? Or are baseline data already available?
  - What strategic documents and policies that are stipulated by GIZ, partners or by the commissioning party must be taken into account?
  - At which particular intervention levels (macro, meso or micro level) does the project/programme aim to promote gender? Within which target groups?
  - What information and materials are already available and can be used as a basis?
- The greater the degree to which the terms of reference can specify the contents and objectives of the gender analysis, the more specific and implementable the recommendations usually are, and the more closely they are aligned with the specific project or programme.
- The terms of reference should specify that the gender analysis is to deliver information on the gender marker, the integration of gender into the objectives system and on the methodological approach. (For more information, see question 7: [What should be the focus of a gender analysis?](#)).
- Responsibilities should also be set out in the terms of reference. They should determine:
  - Who is the contact person for gender in the country or in the project/programme?

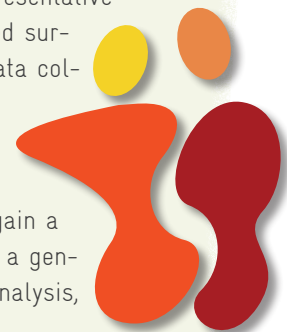
- Who should be involved in drafting and reviewing the gender analysis?
- What deadlines must be observed?
- It is also advisable to specify the language and the length of the gender analysis and, if necessary, have an executive summary or a presentation drafted for an introductory workshop.
- A set of sample terms of reference is often attached to a gender analysis. It is always worthwhile having a look at a high-quality gender analysis from a similar sector or from a similar region. (For more information, see question 8: [Where can I find best-practice examples of gender analyses?](#)).

## 12. What data collection and analysis tools can I use to conduct a gender analysis?

A variety of data collection methods are available in this context. Before we take a look at the different methods available, it is important to explain the difference between primary and secondary data. **Primary data** are data collected and evaluated by GIZ. **Secondary data** are data that have already been collected by other actors and may have been published or made available within the organisation. Before you conduct a gender analysis, you should examine what, if any, gender-related secondary data are available (e.g. from studies, statistics or strategies compiled by the partner or other donor organisations) that describe the situation as regards gender equality at the national or regional level, within the sector, in the partner organisations or at the target group level.

You can use quantitative or qualitative methods to collect your own data.

- **Quantitative data collection methods** use a standardised approach and aim to assess causal relationships and hypotheses by collecting quantifiable data. Where possible, these facts and figures are used to confirm or refute these relationships and hypotheses. In cases where these data collection methods use a random statistical sample, the data collected can make representative statements about an entire group. Standardised questionnaire-based surveys and quantitative content analyses are common quantitative data collection methodologies used for gender analysis.
- **Qualitative methods** adopt a more open approach, for example, by asking open-ended questions. These methods are used to collect information that cannot be quantified, in order to clarify and gain a deeper understanding of an issue. Suitable qualitative methods for a gender analysis include focus group discussions, qualitative content analysis, document reviews and semi-structured interviews.



The cost and benefits of alternative data collection methods must be weighed up against the information they provide and their reliability.

Data should be collected using transparent and verifiable methods in order to deliver credible findings. External persons (consultants/appraisers with special



methodological knowledge of data collection) can also be involved in obtaining, examining and discussing the data.

### **13. In what language should a gender analysis be written?**

A gender analysis can be written in German or one of the working languages used in the country in question (English, French or Spanish). As a gender analysis provides a basis for gender activities in projects and programmes, it is helpful to use a language that is spoken by all project staff members.

### **14. Is a gender analysis training course available?**

The Sectoral Department has developed a training course on gender analysis that runs for three-and-a-half hours. All training documents are available in DMS, along with guidelines on tailoring the course to requirements in other organisational units. For more information, see [DMS](#).

### **15. We are committed to engaging in partner-oriented international cooperation. Are GIZ's gender mainstreaming policies in keeping with this commitment?**

Conducting a gender analysis and working in a gender-responsive manner does not contradict the principle of partner orientation in international cooperation. Most of our partner countries have ratified the most important international human rights conventions, including the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW). The majority are also committed to promoting gender equality via human rights instruments at the regional level, within the scope of the Millennium Development Goals and through a number of political declarations and action plans (such as the Accra Agenda for Action and the Busan Partnership for Effective Development Cooperation). Gender orientation in international cooperation is partner-oriented. It is worth mentioning that the gender policy pursued by some of our partner countries is more progressive than Germany's. For example, at 56%, Rwanda has the highest quota of women in parliament worldwide.<sup>1</sup>

### **16. Does our perception of gender equality conflict with the cultural identity of our partner countries?**

Cultural identity around the globe is heterogeneous and diverse, and is in a state of constant flux. Cultural and political trends in all societies span a broad spectrum, from conservative to progressive.

<sup>1</sup> Vgl. <http://www.ipu.org/wmn-e/classif.htm>, accessed on 24.2.2013.

Proponents of the theory that efforts to increase equality are at odds with a country's cultural identity usually have a vested interest in maintaining the status quo. Those who actually have fewer opportunities to enjoy the same liberties and exercising their rights in a conservative culture usually do not share this opinion. One of the aims of a gender analysis is to allow these groups to also have a say, and to ensure that the development measure takes their interests into account. German international cooperation is value-based – this can also mean strengthening the forces for reform in a society.

Achieving gender equality does not mean we have to force other cultures to accept different values and concepts. It involves engaging in dialogue with partners, in an effort to identify appropriate measures that can be implemented in a specific context in order to promote participatory, non-discriminatory development. Gender analysis can help identify culturally appropriate objectives and methods.

### **17. The programme partners are not interested in conducting a gender analysis. Should we still proceed?**

Yes! A lack of interest in gender analysis could indicate an acute need for gender-specific measures. Plans to implement a gender analysis should only proceed once they have been discussed with the partner side. National gender experts should be involved, in order to tease out the reasons behind any opposition and to trigger a change in attitudes. In this context, common points of entry should be identified, and where necessary, alternative strategies found, for example, by referring to the exercise as a 'differentiated target group analysis' instead. See also question 3: [Do I have to conduct a gender analysis?](#)

### **18. Do I still need to carry out a gender analysis even if a project/programme has been assigned the marker GG-0?**

A gender analysis should be conducted before the gender marker is assigned. In other words, the marker is assigned on the basis of the analysis' findings.

Even if gender issues are not evident at the design stage, this does not mean that they are not relevant for the project/programme. Even if a gender analysis is not carried out before a GG-0 marker is assigned, conducting one for BMZ business is still a mandatory requirement. An analysis should identify how the project/programme can avoid having an unintended negative impact on gender equality, and help achieve positive results at reasonable cost and effort.

## 19. How do I conduct a gender analysis for a regional programme?

Regional programmes engage in cooperation with regional economic communities or with groups at the continental level (such as the African Union). Compared with bilateral programmes, regional programmes are somewhat more removed from the 'traditional' target group of people living in the partner countries of international cooperation. At the same time, however, they cover a number of member states with diverse political systems, institutions, social groups and ideologies. The following questions often arise during gender analysis in regional programmes, for example: Should the target group analysis cover all of the regional organisation's member countries? At the macro level, should the analysis cover the gender policies of all member states?

The answer is a simple one: No, not necessarily. Gender analysis in regional programmes should adopt a pragmatic approach, and should deliver useful results. The 'usefulness' of results will depend on the programme's focus:

- If the programme is geared to building the institutional capacities of the regional organisation, then its staff is the primary target group. This means that the gender analysis could focus on building gender expertise and promoting mainstreaming strategies in the regional organisation's work, without taking into account the gender situation in all member states.
- If the regional programme provides targeted support to some member states on a pilot basis, then you could incorporate the findings of previous gender analyses from these countries into your gender analysis, along with publications that document the gender-specific challenges faced by a number of these countries and gender-responsive approaches in the thematic area in question.
- If, on the other hand, the programme focuses on strengthening mechanisms at the continental level, in order to implement governance and human rights standards throughout Africa, for example, then you could incorporate aggregated data from international and regional sources.
- If the programme works on the same theme in different countries, then your gender analysis should make sector-specific observations in all of the partner countries involved. In such cases, a gender analysis should make recommendations on the methodological approach and the objectives system, against the backdrop of the specific context in each partner country.

Best-practice examples of gender analyses in regional programmes in Department 1 are available [here in DMS](#).



## 20. How do I conduct a gender analysis for a sector project/ programme?

In sector projects and programmes, a gender analysis should also address relevant issues and provide recommendations for mainstreaming gender in the methodological approach and in the objectives system. Unlike in bilateral programmes, an analysis of the country-specific context or of a specific target group in a country is usually not possible because sector projects/programmes have a supraregional or global orientation. Instead, it is advisable to carry out a thematic analysis that identifies gender inequalities within a specific sector and describes the potentials and challenges as regards promoting gender equality, along with possible approaches that are already being pursued. The analysis of sector concepts and international discussions can also play a key role in this context. It can help to identify causal relationships, enabling the development of innovative and gender-sensitive advisory services and strategies.

Examples of best-practice gender analyses carried out by sector projects/programmes are filed [here in DMS](#).

## 21. What is Gender?

**Gender:** 'In contrast to "sex" in the biological sense, the term "gender" denotes the individually learned male/female roles shaped by society. These roles are determined by the social, cultural and economic organisation of a society and by the respective prevailing legal, ethnic and religious norms and values. There are also considerable differences in the gender roles accorded by different societies and even within a society. In contrast to biologically determined roles, gender roles are subject to change. Gender measures use this flexibility as a starting point. They take into account the different situations and interests of women and men, and the fact that there is no gender-neutral reality'<sup>2</sup> A gender-responsive approach will therefore not focus solely on women, nor will it focus solely on men.

**Gender equality:** refers to the premise that women and men should equally benefit from resources, services and chances within their societies. Gender equality does not mean 'sameness' of women and men, but that women and men must have equal rights, chances and opportunities in all areas of the economy and society if real sustainable economic and social development is to be achieved. Because of existing inequalities between women and men, the same treatment of women and men is not sufficient in order to achieve gender equality. Gender equality also includes change in institutions and social relations, which often maintain gender inequalities. Empowerment of women is one strategy to achieve gender equality.<sup>3</sup>

<sup>2</sup> BMZ 'Lexikon der Entwicklungspolitik' (in German only): <http://www.bmz.de/de/service/glossar/index.html>

<sup>3</sup> Steps for Action: <http://www.giz.de/Themen/de/dokumente/gtz-en-steps-for-action-2009.pdf>

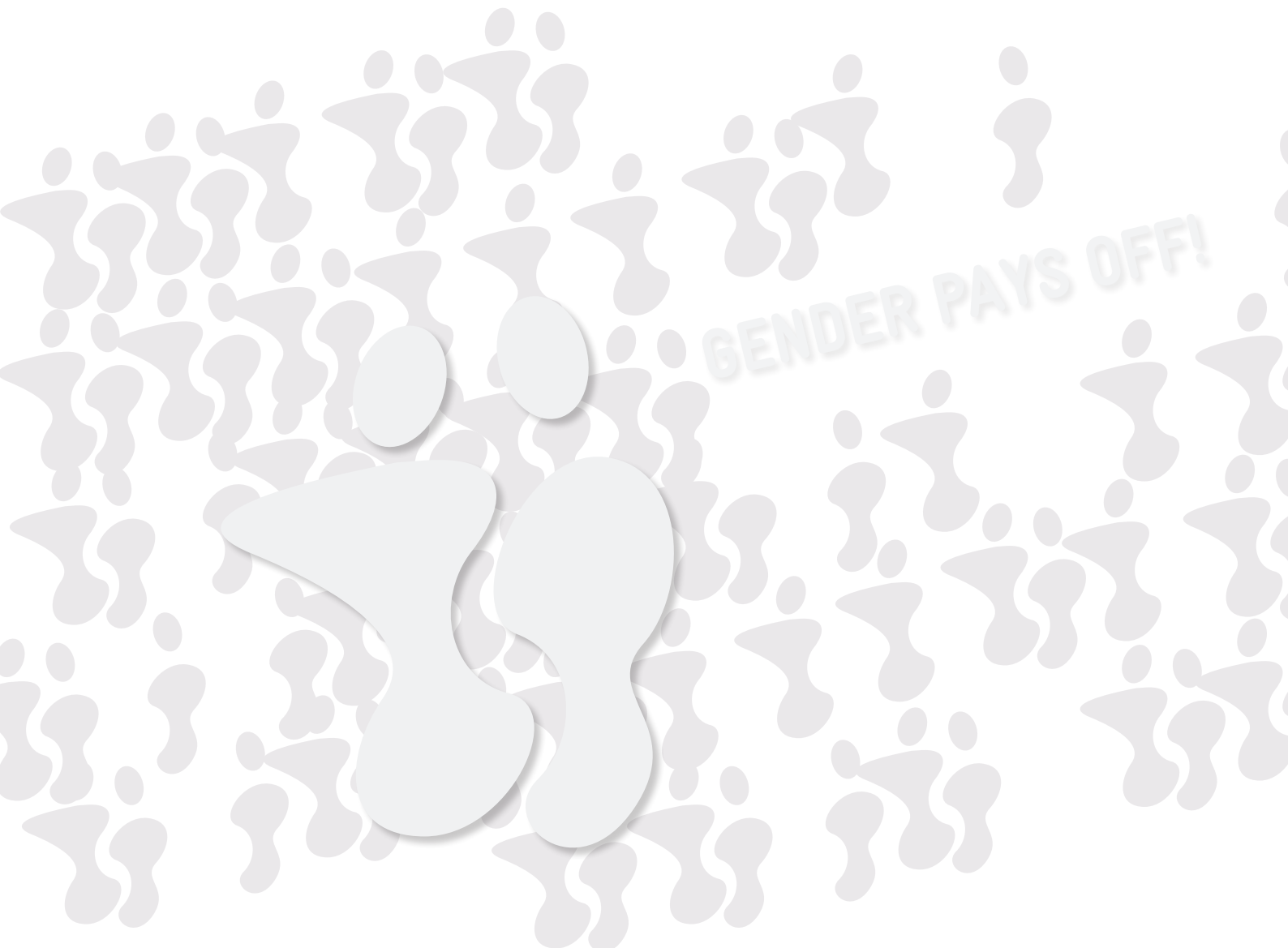
**The dual-track strategy:** International experience has shown that the dual-track strategy – the combination of gender mainstreaming and efforts to eliminate gender discrimination – produces the best results.

- **Gender Mainstreaming** is the systematic and coherent integration of the gender perspective in all development policies and fields of action. It denotes the process of assessing the implications for women and men of any planned action in all political and societal spheres, taking into account their different life situations, concerns and potentials, in order to identify gender-specific discrimination and impacts (gender analysis). These gender-specific impacts must be considered when planning, formulating and implementing development policies and measures in all sectors and priority areas. We thereby aim to mainstream gender equality across the board.
- **Targeted actions to promote gender equality** are necessary in order to compensate for actual disadvantages and discrimination. These measures are usually geared towards women, as they experience discrimination in almost all societies. This is not always the case, however. Overall conditions must be reformed and both women and men must be empowered to assert and exercise their rights, regardless of their gender.<sup>4</sup>

All internal references can be found in the following DMS-folder:

[Enterprise > 1 Collaboration > Cross-OE work groups > Gender Mainstreaming \(GIZ Genderstrategie\) > AG Genderanalyse.](#)

<sup>4</sup> Based on the definition from BMZ's Development Policy Action Plan on Gender 2009–2012



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