

Mainstreaming Gender Equality

Sida's support for the promotion of
gender equality in partner countries
Country Report South Africa

Bonnie Keller, Team leader
Sarah Forti
Britha Mikkelsen
Susanne Possing
Kgotso Schoeman
Rose-Pearl Pethu Serote

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Authors: Bonnie Keller, Team leader, Sarah Forti, Britha Mikkelsen, Susanne Possing, Kgotso Schoeman, Rose-Pearl Serote.

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SWEDISH INTERNATIONAL DEVELOPMENT COOPERATION AGENCY

Address: S-105 25 Stockholm, Sweden. Office: Sveavägen 20, Stockholm

Telephone: +46 (0)8-698 50 00. Telefax: +46 (0)8-20 88 64

Telegram: [sida stockholm](mailto:sida.stockholm). Postgiro: 1 56 34-9

E-mail: info@sida.se.

Website: <http://www.sida.se>

Preface

In 1996, gender equality was established as a goal for Swedish development co-operation, and one year later Sida formulated an Action Programme for promoting gender equality. The Action Programme focuses on a mainstreaming strategy for working towards the gender equality goal. According to such a strategy, gender equality should pervade all development policies, strategies and interventions.

The evaluation deals with gender equality in country strategies and projects. It is based on case studies in Bangladesh, Nicaragua and South Africa. This is the country report for South Africa. The country reports for Bangladesh and Nicaragua are published as Sida Evaluation Reports 02/01:1 and 2. The main report is published as number 02/01 in the same series.

The evaluation is the result of an extended process involving many actors. It rests primarily on contributions from representatives of partner organisations in South Africa, and Sida and Embassy staff. The evaluation was carried out by, Cowi Consult, Denmark in co-operation with Goss Gilroy, Canada.

Lessons from the evaluation will be fed into a planned revision of the Action Programme. The evaluation will also form a basis for Sida's reporting to the Swedish Government on the results of efforts to promote gender equality.

Stockholm, January 2002

Stefan Molund
Acting Head of Department for
Evaluation and Internal Audit

The synthesis report and the country reports constituting the Mainstreaming Gender Equality evaluation are listed below:

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|---------|--|
| 02/01 | Mainstreaming Gender Equality – Sida's support for the promotion of gender equality in partner countries |
| 02/01:1 | Mainstreaming Gender Equality – Country Report Bangladesh |
| 02/01:2 | Mainstreaming Gender Equality – Country Report Nicaragua |
| 02/01:3 | Mainstreaming Gender Equality – Country Report South Africa |
| 02/01:4 | Integración de la Perspectiva de Igualdad de Género – Informe de País Nicaragua |

Table of contents

Acronyms and abbreviations	iii
Executive Summary	vi
1 Introduction	1
1.1 Scope of the South African Case Study	2
1.2 Analytical Dimensions of the Key Evaluation Issues	4
1.2.1 <i>Dialogue on Gender Equality</i>	4
1.2.2 <i>Defining Gender Equality Goals</i>	4
1.2.3 <i>Mainstreaming</i>	6
1.2.4 <i>Poverty and Gender Equality</i>	7
1.2.5 <i>Stakeholder Participation and Gender Equality</i>	7
1.2.6 <i>Changes in Gender Equality</i>	8
1.3 Methodology	10
2 The Environment for Gender Equality in South Africa	15
2.1 The General Situation	15
2.2 Northern Cape Province	19
2.3 Major Issues and their Implications for Gender Equality	19
3 The Country Strategy and Dialogue on Gender Equality	23
3.1 The First Country Strategy in Democratic South Africa	23
3.1.1 <i>Country Analysis</i>	24
3.1.2 <i>Development Policies and Priorities of the South African Government</i>	25
3.1.3 <i>Key Elements of Swedish/South African Dialogue during Country Strategy Preparation</i>	26
3.1.4 <i>Objectives and Themes of Swedish Development Co-operation</i>	27
3.2 Dialogue on Gender Equality	29
3.2.1 <i>Government-to-Government Dialogue</i>	30
3.2.2 <i>Dialogue on Interventions</i>	31
3.2.3 <i>Dialogue with Civil Society</i>	32

4	Mainstreaming Gender Equality – Four Interventions in South Africa	34
4.1	Summary of the Four Interventions	34
4.2	Gender Equality Goals	36
4.3	Mainstreaming Components and Processes in the Interventions	42
4.3.1	<i>Gender Mainstreaming at Statistics SA</i>	42
4.3.2	<i>Gender Mainstreaming in LGDSP</i>	44
4.3.3	<i>Gender Mainstreaming in CUP</i>	48
4.3.4	<i>Gender Mainstreaming in TPL</i>	50
4.4	Analysis of Gender Mainstreaming	52
5	Poverty Reduction and Gender Equality	57
6	Stakeholder Participation and Gender Equality	63
6.1	Statistics South Africa	63
6.2	LGDSP	65
6.3	The Urban Development Programmes	67
7	Changes in Gender Equality	72
7.1	Concepts – their Locally Constructed Meanings	72
7.2	Changes towards Gender Equality	77
8	Lessons Learned	85
8.1	Lessons for the South African Programme	85
8.2	Lessons for Swedish Development Co-operation	89
	Annex 1 Terms of Reference	92
	Annex 2 Stakeholder Analyses	104
	Annex 3 Analytical Frameworks and Study Objects	107
	Annex 4 Men and Male Roles in Post-Apartheid South Africa	126
	Annex 5 Selected Statistical Indicators	131
	Annex 6 Agenda for the South African Country Study	137
	Annex 7 People Met/Interviewed	140
	Annex 8 Selected Documents Consulted	148

Acronyms and Abbreviations

CEDAW	Convention on the Elimination of All Forms of Discrimination against Women
CBO	Community based organisation
CGE	Commission on Gender Equality
CS	Country Strategy
CUP	Comprehensive Urban Plan
GEAR	Growth, Employment and Redistribution Strategy
GPC TT	Gender, Poverty and Children's Issues Task Team
KCC	Kimberley City Council
LGDSP	Local Government Development Support Programme
MTEF	Medium Term Expenditure Framework
NGO	Non-governmental organisation
NCP	Northern Cape Province
OSW	Office on the Status of Women
PPP	Public Participation Programme
PRA	Participatory Rural Appraisal
RDP	Reconstruction and Development Programme
SALGA	South African Local Government Association
SANGOCO	South African National NGO Coalition
SDA	Social Development Adviser
Sida	Swedish International Development Co-operation Agency
StatsSA	Statistics South Africa
TORs	Terms of Reference
TPL	Trees, Paving and Lighting Project
UTV	Department for Evaluation and Internal Audit

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Map of South Africa



Executive Summary

– South African Country Report

Introduction

In 2000 Sida commissioned an *Evaluation of Sida's support to development cooperation for the promotion of Gender Equality* with three objectives: 1) to assess how Sida's mainstreaming strategy is reflected in the country strategy process; 2) to assess the strategic and/or practical changes with regards to the promotion of gender equality that interventions supported by Sida have contributed to or may contribute to; and 3) to provide an input to a deeper understanding of the concrete meaning of concepts in interventions supported by Sida (gender equality, empowerment of women, stakeholder participation, strategic and practical changes with regard to gender equality and mainstreaming). The evaluation included three country case studies. This report covers South Africa, with Nicaragua and Bangladesh the subjects of separate reports.

The South African study team assessed the treatment of gender equality issues in the Country Strategy and analysed four interventions that had been selected for detailed study: Statistics South Africa, Local Government Development Support Programme, Comprehensive Urban Plan and Trees, Paving and Lighting. The country study took place from 22 April–11 May 2001. The team comprised Bonnie Keller, team leader; Pethu Serote and Kgotso Schoeman, national consultants, Britha Mikkelsen, overall evaluation team leader from COWI, who participated for one week, and Sarah Forti and Susanne Possing, also from COWI.

The key issues derived from the Terms of Reference for the overall evaluation are:

- To what extent is Sida's mainstreaming strategy reflected in the *country strategy process* for South Africa?
- What has been the *gender equality content* of the four interventions in South Africa, including the *goal* of gender equality as reflected in intervention design and implementation and the use of a *mainstreaming strategy*?
- What is the relationship in each intervention between the pursuit of gender equality as a goal and the need to address *poverty reduction*?
- *Which changes* have occurred in the gender equality situation as a result of the interventions?

- How can the experiences of the four interventions reviewed assist in a deeper understanding of the use and *meaning of concepts* such as gender equality, women's empowerment and practical and strategic changes?

The main intention of the evaluation was to identify lessons for future policy and strategy revision and for the application of these lessons in practical development cooperation.

The evaluation team clarified conceptual and analytical issues and developed frameworks to operationalise the Terms of Reference and to bring consistency across the three country case studies. Issues and frameworks covered:

- Dialogue on gender equality between governments, with interventions and with civil society partners;
- Defining gender equality goals;
- Mainstreaming, including a 6-point scale to assess level of mainstreaming;
- Synergies and links between gender equality and poverty reduction;
- Stakeholder participation and gender equality, including ranking primary stakeholder participation across 7 levels; and
- Changes in gender equality, based on observed or reported differences among women and men beneficiaries and including empowerment and practical and strategic changes.

Data collection methods included 1) extensive document review; 2) interviews with Sida programme staff, intervention staff and consultants; and 3) group discussions and participatory focus groups and workshops with project implementers and primary stakeholders.

The Environment for Gender Equality in South Africa

The issue of gender equality has become more visible with the change of government from the *apartheid* system to democracy in 1994. The Constitution provides the foundation for gender equality. Although Parliament has made some progress to pass legislation meant to change both the position and condition of women, discriminatory acts from the past still exist. Government structures for working towards gender equality have been put in place: the Commission on Gender Equality, the Office on the Status of Women and a Parliamentary Joint Monitoring Committee on the Improvement of the Quality of Life and Status of Women. The main function of these structures is to mainstream gender in all legislation, government policy and planning. However, although the legal and political environments can be regarded as enabling of gender equality, the biggest challenge is the implementation of programmes aimed at attaining this goal. In general, gender structures in government remain weak and under-resourced.

NGOs are mainly represented in urban areas where most of the mobilisation around social issues took place in the past. Most organisations that have taken

the lead in lobbying for and working towards gender equality, as in relation to violence against women and HIV/AIDS, are women's organisations. After 1994 NGO leaders were recruited into government, thus leaving a leadership vacuum in civil society and weakening what had been, before then, an organised women's movement.

Local government is the ideal site to impact on gender inequalities because it is responsible for delivery of services which impact on women's and men's lives. However, in rural provinces where poverty is most acute, the limited financial base of local government is a serious problem and the structures to promote gender equality are weak. Much of the report deals with interventions located in Northern Cape Province (NCP), which has its own unique history and social characteristics. It is a large province, predominantly semi-desert and rural, Afrikaans speaking, with high levels of joblessness and poverty and relatively few civil society organisations.

The Country Strategy and Dialogue on Gender Equality

The First Country Strategy in Democratic South Africa: In early 1998 the Swedish Government took a decision to prepare a Country Strategy for Development Cooperation with South Africa for the period January 1, 1999–December 31, 2003. A general consideration of development cooperation was that “Swedish support is motivated primarily by the extreme income gaps and special difficulties that have been inherited from the apartheid period. South Africa is, however, a country with rich resources and good prospects . . . capable of making itself independent of donor assistance. This perspective . . . opens the possibilities for development of new and long-term sustainable forms of co-operation.”

The Country Analysis states, as strategic priorities, that gender and poverty issues should be approached “in parallel” – in dialogue with South Africa, by approaching all development interventions with a “gender and poverty perspective” and by interventions that are “directly aimed at gender and poverty.” The intent to ensure that all development interventions have a “gender and poverty perspective” is made clear.

South Africa does not have a poverty reduction policy, and the draft *National Policy Framework for Women's Empowerment and Gender Equality* was not, and still is not, available as a guide for development cooperation. South Africa's priorities in its cooperation with Sweden, as stated in the Country Strategy, include support for the cross-sectoral area of gender equality.

Dialogue during CS preparation took several forms: meetings between the Embassy and the Department of Finance, semi-annual and annual consultations on government-to-government cooperation, commissioning of studies and networking. Official discussions between the two governments included key South African stakeholder institutions – Finance, Foreign Affairs, sectoral departments and the parliamentary Women's Empowerment Unit. Commis-

sioning of 21 studies to provide concrete information was seen as an important part of dialogue during CS preparation. Two of these studies were extensive reviews of the gender equality and poverty situations. The Embassy told the evaluation team that, in retrospect, the process of CS preparation could have included more discussion with a wide variety of South African stakeholders, rather than reliance on inputs from many studies, most of which were not later used.

The Strategy does not completely follow through with its stated principal, that gender equality should be a *common element* in the overall cooperation programme. The need for a gender equality perspective is made explicit in democratic governance and education but is not mentioned in the areas of urban development and housing and in economic cooperation. Sida gender advocates who had been involved in CS preparation were of the view that gender equality had received less visibility than they had hoped. Others felt that all major themes, including gender equality, had been well covered in the CS.

There were opportunities that were not taken in the CS: to make a more concrete analysis on the nature of the links, and potential synergies, between gender equality and poverty reduction and to carry through with the mainstreaming principle in urban development and housing, where interventions were already underway, and in economic cooperation.

Dialogue on Gender Equality: Sida normally emphasises the goal of supporting progress towards gender equality in government-to-government dialogue, the most important formal occasion being at Annual Consultations. However, there is usually no further minuted discussion of gender equality at the Consultations, either in general or with reference to a specific intervention or theme. Annual Consultations are now organised by discussion of themes, rather than programmes, and this provides scope for integrating dialogue on gender equality *into* discussions on other specific themes and sectors. It is important that any such discussions be minuted. At intervention level there was significant and detailed dialogue in the past, particularly between the Social Development Adviser and specific intervention partners. However, the role of the SDA was not always clear – whether adviser within the Embassy or “consultant” to interventions. Given the heavy responsibilities of Embassy staff that make field visits infrequent, it is important that gender equality is integrated into items on the agenda for sector reviews and, again, that discussions are adequately minuted. The extensive dialogue with civil society organisations appears to have decreased since the posts of SDA and her local successor were terminated. However, other opportunities such as inviting civil society representatives to Annual Consultations, are now being taken.

To be an effective mechanism in development cooperation, there are opportunities for more specific dialogue about gender equality in specific thematic areas and sectors. A representative from Department of Finance was of the view that key issues could be used as a point of departure at each Consultation and that the inclusion of national poverty and gender experts from government would assist to make the dialogue at formal discussions more concrete.

Mainstreaming Gender Equality – Four Interventions in South Africa

The Four Interventions

Statistics SA – Statistics Sweden Technical Assistance Programme (StatsSA) included cooperation on a variety of statistical products and on strengthening the institutional infrastructure. The Local Government Development Support Programme (LGDSP), phase 1, was a programme to assist municipalities in Northern Cape Province to improve their service delivery, based on the needs of the people. The Comprehensive Urban Plan (CUP) consisted of preparation of an integrated urban development plan for Kimberley. The Trees, Paving and Lighting Project (TPL) improved aspects of the urban environment in disadvantaged city suburbs of Kimberley.

Gender Equality Goals

Sida's *Action Programme* states that interventions should be explicit regarding equality goals. The interventions studied in South Africa exhibited considerable variation with regard to the nature of equality goals in programme design. Sida or Swedish consultants took a pro-active role to include some form of gender equality goal in the interventions in the Northern Cape, where lack of experience and resistance made ownership of gender equality problematic in the beginning.

The two democratic governance programmes included rather explicit goals linking equality in some way with the specific sector – gender sensitising all relevant statistics (StatsSA) and integrating gender into the local government programme (LGDSP). The gender equality objectives in the StatsSA programme derive from a clear rationale, and the institution was supportive. The gender equality goal in LGDSP was also explicit, but the issue of ownership by the partner government institution was more problematic than in the case of StatsSA. The CUP design was less explicit but included “gender” as one of several new components to be included in urban planning. The inclusion of a gender perspective in this technical planning project was not based on a sense of ownership by the local partner, at least not in the beginning. The TPL design had a women's participation target, which was not framed in the context of unequal gender relations.

The presence of clear, explicit gender equality goals in an intervention is important to enhance the possibility that activities will have an impact on unequal gender relations. The absence of explicit goals means that monitoring and other learning and accountability tools are not used to address whatever gender equality contributions the intervention may make. The evaluation team does not contend that gender equality goals over-ride other priorities, such as poverty reduction. Rather, that a Sida-supported intervention should recognise where, if and how a contribution to gender equality can and should

be a goal in combination with and linked to Sida's other cross-cutting sector-specific goals. If gender equality goals are clearly stated, it is easier to work with them during implementation of intervention activities. If there is no gender equality goal in intervention design, it is still possible to work within implementation processes to raise awareness and to begin to address gender equality issues.

One lesson learned from the Northern Cape experience is that when Sida works with programme designs originating from more conservative institutional partners, it is important to discuss the implications of South Africa's national and international commitments to gender equality for a specific programme.

Mainstreaming Components and Processes in the Interventions

Statistics SA: Gender equality mainstreaming within the programme of cooperation between Statistics Sweden and StatsSA has concentrated on supporting affirmative action to increase the representation of black persons and women within the institution. Over time it has been taken to be the main focus of working with gender issues in the programme. Although affirmative action is important, there has been no explicit effort to work with mainstreaming in some relevant components where Swedish TA has played an important role, such as training in statistical methods and developing a clientele of users. The small Gender Unit in StatsSA is responsible for improving gender-relevant statistics. Sida was active at the beginning of the cooperation programme in dialogue with StatsSA on ways to support the Gender Unit. However, because of an existing agreement between StatsSA and Statistics Norway, this planned component did not take place. The Gender Unit has been working to improve the gender-relevant statistics captured by surveys, and there are indications that recognition of the importance of these statistics is increasing within the institution. Thus, there is potential to work with a broader interpretation of gender mainstreaming, in addition to affirmative action, in the future.

LGDSP: LGDSP had an effective intervention structure, with a provincial-level Gender, Poverty and Children's Issues Task Team responsible for gender mainstreaming in the entire programme. The programme developed a gender mainstreaming strategy suitable to the local conservative environment and deliberately chose the least threatening approach, focusing on building gender awareness and on working towards gender balance. This strategy included only limited analysis of gender inequalities in the province. However, gender training increased awareness of general gender issues, and community-based surveys opened up the possibility for working with sex-disaggregated data and with more specific gender analysis in the future. The duration of Phase 1 was perhaps too short to enable key stakeholders to expand the concept of mainstreaming to include systematic work on gender inequalities, related to racial and socio-economic inequalities. The main output of the first phase was a series of Training Manuals, including one on Gender Main-

streaming. There is an opportunity in phase 2 to integrate a broader approach to gender mainstreaming in other thematic manuals, such as that on Poverty Alleviation and Job Creation.

CUP: CUP received support for gender equality mainstreaming from the Embassy and from the TA which managed the intervention; the reception by Kimberley City Council was positive, and gender training was provided. Gender mainstreaming was implicit in CUP, rather than an explicit strategy. During the consultative and information-sharing Public Participation Process, substantive efforts were made to be gender sensitive and to hear women's as well as men's views. However, a Gender Review commissioned by Sida noted that integration of gender mainstreaming in PPP was *ad hoc*, rather than systematic. The efforts invested are not fully reflected in the main output of the intervention, the comprehensive plan, where gender-differentiated needs are not highly visible in some relevant sections.

TPL: TPL did not have an explicit gender equality mainstreaming strategy, but rather an implicit approach which translated into a rather narrow focus on women's representation in project implementation mechanisms and in their participation in labour intensive works. Gender training was provided. As with CUP, the evaluation team found that some key stakeholders (KCC officers, councillors, community leaders) had become more familiar with working with gender issues during implementation. As pointed out by the Gender Review, however, the intervention had a narrow interpretation of gender mainstreaming, focusing on women's representation and participation.

Analysis of Gender Mainstreaming

The evaluation findings showed that the four interventions had taken up some elements of mainstreaming, to varying degrees and in a partial way. It is therefore instructive to examine various components that are important in contributing to the process of mainstreaming, by looking across all four interventions.

Mainstreaming strategy: One common finding was that key mainstreaming elements in interventions were not brought together in a systematic way. It is perhaps too soon to have expected this, given the timing of the interventions in relation to Sida's *Action Plan* and the fact that experience had not yet been acquired. The South African interventions offer instructive lessons, however, on the way in which explicit equality goals in intervention design are strengthened if they are linked to an overall strategy, as in LGDSP.

Gender analysis: Although initial efforts were made to work with analysis of gender issues in urban planning and to commission studies, as in LGDSP, this was a new area to most intervention stakeholders. If more systematic gender analyses had been undertaken and findings integrated into implementation design, it is less likely that the major focus of some interventions would have remained only at the level of women's representation and participation.

Mainstreaming structures: LGDSP had a well thought-out intervention structure to promote mainstreaming, but it was not permanently institutionalised within the host department – and hence, in the long run, not sustainable. StatsSA, on the other hand, has a Gender Unit and thus the potential to make a long-term and lasting impact on mainstreaming gender equality. The mechanisms to promote mainstreaming at KCC were also intervention related and thus short term.

Roles and responsibilities of key actors: The evaluation team learned that interventions had benefited most during the time that a specific position to work with gender equality existed at the Embassy. Although work to advance Sida’s development goals is the responsibility of all programme staff, the team is fully aware that time, pressure of work, competing demands and availability of resources may make this difficult. One issue that staff at headquarters emphasised to the evaluation team was the key responsibility for working with gender equality of TA and consultants and that accountability mechanisms for all programme officers and TA are necessary.

Ownership: Although ownership – commitment to and willingness to work towards gender equality – by partners is less of an issue in South Africa than in some other countries, in some cases such as small municipal councils in the Northern Cape bureaucratic resistance and the problem of lack of ownership was experienced. In such cases, Sida has an opportunity to be more proactive in its dialogue with interventions, by referring to SA’s own policies on gender equality and women’s empowerment in order to broaden the interpretation of gender equality, beyond gender balance.

Institutional capacity and resources: Given staff turn-over and project implementers who are on fixed period contracts, it is important that monitoring systems to track the effects of gender mainstreaming are established or, where they already exist, made gender-relevant. The evaluation found no systematic monitoring in the interventions.

Building capacity: Gender training was an important mainstreaming component in all interventions except StatsSA, but constraints such as the timing of training and the lack of follow-up to introductory training were noted. The evaluation team noted that opportunities to build capacity of local civil society partners in gender training and gender analysis and to link them to interventions could contribute to sustainability of efforts.

The evaluation team concluded that Sida needs to persist in working to support mainstreaming, within Sida itself and with partners. It is the most viable strategy for achieving gender equality goals. It is important to recognise that development of mainstreaming capacity takes time, much more time than the short life span of these interventions allowed. Now that some basis for gender mainstreaming has been established, there are good opportunities for Sida in partnership with South Africa to promote gender equality as a means (to democracy and development) as well as an end.

Poverty Reduction and Gender Equality

By African standards, South Africa is a rich country but also one with severe poverty that has racial, gender and regional dimensions. Poor urban women whom the evaluation team met clearly expressed how they experienced the links between gender inequality and vulnerability to poverty in their own lives. One said, for example, “When women earn money they put food on the table, and when men earn money they drink to ignore their poverty problem.”

The interventions made diverse contributions to poverty reduction. CUP highlighted job creation as a poverty alleviation strategy, and TPL put job creation into practice, albeit on a limited scale. Both interventions gave poor people access to knowledge and the possibility to exercise the right to express their views about local governance issues. LGDSP had an explicit poverty alleviation strategy, focused primarily on job creation, but in addition supported women’s access to decision-making positions and the improvement of residents’ access to services from local government. StatsSA has taken important steps to improve documentation of the country’s poverty situation. Apart from StatsSA, the evaluation team did not find that the links between poverty reduction and gender equality had been explicitly made in the interventions.

The contributions made by the interventions to poverty reduction were important but at the same time provided lessons about the value that could be added by more clearly linking poverty, gender and other dimensions of social difference. The findings support Sida’s view that a multi-dimensional understanding of poverty must be gender sensitive. The team also wishes to stress that gender equality must be an explicit goal when linked to poverty reduction to ensure that gender issues are not taken for granted and are therefore not addressed.

Stakeholder Participation and Gender Equality

Democracy in South Africa is still deeply affected by the *apartheid* years. The lost opportunities for genuine and equal participation by people of all races and both sexes affect the structures of Sida’s partner organisations, such as KCC and other municipalities, which today are to promote community participation in interventions. There is only a very short history of consulting with people, on which to build.

At StatsSA the evaluation team looked at participation by provincial statistical offices and users of gender-relevant statistical data. The statistical office for the Northern Cape in Kimberley described itself as marginalised. StatsSA in NCP told the evaluation team that they had not yet had a purposeful dialogue on gender issues with local users of statistics. The evaluation also looked at participation from the point of view of provincial users of statistics to understand to what degree users are aware of the relevance of gender dimensions in sectoral planning and whether there is current or potential demand for gender-relevant data. The findings from a workshop indicated that this was a new

way of thinking and that greater familiarity with gender issues will be needed before users become more pro-active clients/participants vis-à-vis StatsSA.

The three interventions that worked at community level all developed approaches to foster community participation. In LGDSP gender equality issues were addressed through representation of both women and men in municipal task teams. Some initiatives were made to solicit the views of members of communities that task teams represented, but gender issues had limited visibility within these initiatives. KCC worked with participatory issues for the first time in the context of Sida-funded projects. In CUP there were extensive efforts made through the Public Participation Programme to give residents, including women, the ability to exercise their right to make their voices heard. Diverse views, from women and others, were not clearly reflected in the Comprehensive Urban Plan, however. In TPL there were efforts to establish mechanisms to inform and to consult with residents, to engage them in the work opportunities that the project offered and to include women as well as men.

The interventions therefore made progress in fostering some types of participation (such as participation by consultation), but none reached the level of interactive participation in which people are able to have a say in decisions that impact on their own welfare. However, the evaluation team witnessed growing interest and willingness to work with community stakeholders, demonstrating that opportunities have been created through the interventions. Just as with poverty reduction, it is necessary to make explicit links between gender equality and participation.

Changes in Gender Equality

Concepts – their Locally Constructed Meanings

An evaluation objective was to provide a deeper understanding of the local concrete meanings attached to specific concepts such as gender equality. The evaluation team asked, “what do these concepts mean in the context of South Africa, given its particular history and current social dynamics, and what do they mean to various stakeholders in the context of the four interventions?” Locally constructed meanings are one of the factors that play a role in influencing how gender equality has been approached and what changes may have been set in motion.

Five dimensions of the meaning of gender equality, as key institutions in South Africa use the concept, were found to be common: a *human rights perspective* – the equal and inalienable rights of all women and men that are enshrined in the Bill of Rights of the Constitution; *unequal gender relationships* that have to be challenged to move forward; *empowerment of women* – both a means for achieving gender equality and a goal in its own right; *transformative social change*, to eliminate all inherited structures and practices of injustice and inequality;

and *representativity* – how many women/men of which races in which positions in which institutions.

These dimensions of gender equality concepts resonated differently with various categories of stakeholders in NCP. Secondary stakeholders associated with the interventions tended to single out representativity – that gender equality had to do with achieving gender balance in numbers of women and men in an activity. In contrast, primary stakeholders explained the concepts more with reference to their social positioning. Thus, black men were comfortable with representativity because they believed this would not significantly challenge their position of superiority. Black women identified more broadly with a rights perspective and with women’s empowerment. Also that equality means treating people with tolerance and respect and honouring their dignity as human beings – an explanation that is rooted in local experience that reflects historical realities.

The widespread interpretation of gender equality as more balanced participation of women and men had an obvious effect on the way in which gender goals in the interventions were interpreted, and thus on the way that mainstreaming was applied.

Changes towards Gender Equality

None of the interventions had targets or indicators, except TPL (a *pro forma* target for women’s participation in some project activities). M & E systems had not yet been developed to allow the possibility of tracking changes over time. The evaluation team therefore grappled with the question of change by asking diverse stakeholders whether the interventions with which they had been associated had produced changes, and if so – of what type and in which direction.

Programme implementers reported modest concrete changes produced by interventions in the direction of gender equality. However, there was one important intangible output by the interventions in NCP that was mentioned to the evaluation team over and over again. This was the increased awareness of gender issues – whether expressed as “gender balance,” or as “involving women” or as a deeper understanding of engendered needs and interests.

One could not expect to see many changes directly attributable to the interventions, given their short duration. However, the creation and strengthening of awareness of and support for gender equality is a critical change that will be important in supporting future development cooperation initiatives. Sida needs to be persistent and to provide support and continuity over a sufficiently long period of time so that opportunities, that have taken time to create, are not lost.

Lessons Learned

Lessons for the South African Programme

1. **EXPANDING THE MAINSTREAMING PERSPECTIVE IN THE CS:** The clear link with democratic governance has supported work on gender equality in interventions in this sector, which have more explicit goals and have made some progress in mainstreaming. Similar progress could be made in other sectors and focus areas of development cooperation, if the links to gender equality were spelled out clearly in the CS.
2. **ANALYSIS OF GENDER AND POVERTY LINKS IN THE COUNTRY PROGRAMME:** Preparation of the next CS gives an opportunity to make brief but explicit links between gender equality, sectors or themes (such as economic cooperation) and poverty reduction.
3. **SIDA'S DIALOGUE WITH THE SOUTH AFRICAN GOVERNMENT:** The efforts that the Embassy is currently making to dialogue with partners are considerable. Ways of increasing and making more concrete the dialogue on specific gender equality issues, linked to poverty, to sectors and to meaningful participation strategies could be explored.
4. **SIDA'S DIALOGUE WITH THE NATIONAL GENDER MACHINERY AND WITH CIVIL SOCIETY:** In addition to the dialogue that the Embassy currently conducts with civil society, it is important to find ways of strengthening contacts.
5. **INTEGRATION OF A GENDER PERSPECTIVE IN NEW PROGRAMMES:** Good opportunities to include a gender perspective in programmes now in their initial stages exist and should be utilised, such as the new Budget Poverty Reduction Project with the Department of Finance.
6. **WORKING WITH GENDER EQUALITY IN THE SOUTH AFRICAN CONTEXT:** The evaluation findings showed that *locally important meanings* of gender equality vary but that, for those who previously suffered social exclusion, gender inequalities are linked with race and class. Many key stakeholders are able to go beyond a conservative interpretation of the gender equality goal (gender balance) and to reflect on *South Africa's national goals* (gender equality and women's empowerment), giving an opportunity for Sida to work with interventions on gender equality goals that go "beyond numbers."
7. **MAINSTREAMING LESSONS:** The main lesson learned from the interventions studied was that mainstreaming is taking place, albeit in an embryonic way. It is important to build on the experiences that have been obtained. These experiences show that more substantial gender analysis will improve the effects of the intervention on those who are intended to benefit. One lesson learned from the evaluations studied in NCP is that a gender analysis based on locally available sex-disaggregated statistics and gender data would have made mainstreaming efforts more focused. Intervention experiences with gender training showed that continued training should be

supported, made as specific to intervention issues as possible and optimised by being followed up with further training. None of the interventions studied monitored the effects and impacts of activities. To support further development of mainstreaming capability, Sida can work with the planning of new interventions on clarity of gender equality goals and objectives, realistic targets and indicators and supporting development of gender-sensitive monitoring systems.

8. **APPLICATION OF LESSONS LEARNED BY INTERVENTIONS:** The lessons from working in NCP, such as the gender-race-poverty dynamic, have relevance for other Sida-supported provincial interventions. LGDSP can build on experiences gained in working with gender mainstreaming and poverty alleviation to create links between these in the second phase. The lessons from KCC, on gender perspectives in participatory processes and working to include different stakeholders' needs and priorities in municipal service delivery, are relevant to other Sida-supported urban development interventions.
9. **SYNERGIES BETWEEN GENDER EQUALITY AND POVERTY:** The evaluation findings demonstrated that a foundation has been built in the interventions to make more explicit links between poverty reduction and gender equality in the future. The way in which poor urban women were able to articulate these links demonstrates that it is possible to go beyond general statements and build on the perceptions of deprivation of particular primary stakeholder groups.
10. **STAKEHOLDER PARTICIPATION:** The evaluation findings showed that much of the effort to promote participation focused on information sharing and consultation. The intention to give people a voice in determining their own development through more representative participation appeared in planning documents but was largely not realised. The lesson learned is the need for strategies to capacitate and maximise the potential and experience that local groups provide.

Lessons for Swedish Development Cooperation

11. **GENDER EQUALITY GOAL:** The findings from South Africa showed that making gender equality a strategic priority in the CS and following through with incorporation of gender equality goals in interventions produced results. The evaluation team learned from discussions at Sida that, although some of the early momentum has now dissipated, there is still *great will and commitment to the goal*. Sida's commitment to gender equality should be strengthened, even as Sweden's policies on development cooperation change. One reason for loss of momentum is that Sida programme officers find it difficult in practice to work with all Sida's development cooperation goals and action programmes. There is an advantage to linking gender equality to other development cooperation goals, to facilitate identification of synergies. It is also important that the *visibility of the gender equality goal* is maintained.

12. “WOMEN”: The South African findings showed that there is still a tendency by diverse stakeholders to equate gender equality with promoting women’s participation, in isolation of the context of gender inequalities. More rigorous scrutiny by Sida of project proposals and programme designs of planned interventions could support gender equality in development thinking, rather than a narrow focus on women’s participation.
13. MAINSTREAMING STRATEGY: The South African findings showed that many stakeholders (Embassy, implementing partners) *are* increasingly working with mainstreaming components and elements, albeit it in an eclectic way. Mainstreaming has been on the international and Swedish agenda for a relatively short period, and the evaluation findings give cause for optimism. Mainstreaming should continue to be supported, not just in new interventions but in on-going ones where there is potential to support incorporation of mainstreaming elements.
14. Sida’s gender equality goal and mainstreaming strategy have *resource implications*. In interventions where there is a clear rationale for gender equality mainstreaming, adequate funding to support this is necessary – whether for training (of TA, at intervention level, etc.), delivery of national gender equality advisory services, development of a gender-sensitive monitoring system, etc.
15. ACCOUNTABILITY: Mainstreaming will be further promoted by more rigorous accountability required from programme implementers. Accountability mechanisms can be included in programme designs and requested in reporting. Accountability is especially necessary in TORs and contracts of *consultants/TA* who manage interventions on Sida’s behalf.
16. GENDER SKILLS AND EXPERTISE: Working with gender equality goals and mainstreaming is the responsibility of all Sida programme officers. The South African findings showed that their gender skills, acquired from Sida’s training or through experience, are enhanced when there is professional gender expertise available, both to the Embassy and to the interventions. This lesson has resource implications. If it is not possible to have a staff position for a gender expert at an Embassy, such expertise can be budgeted for specific tasks, such as working with a partner organisation on a project proposal, participating in a sector review, etc.

Chapter 1

Introduction

“In May 1996 the Swedish Parliament established the promotion of equality between women and men as a goal for Swedish development co-operation. The establishment of the goal consolidates a long tradition of emphasis on equality within Swedish development co-operation since the 1960s. It is, as well, a clear illustration of the political consensus within Sweden on the importance of equality between women and men for development, both within Sweden itself and in Swedish development co-operation.”¹

Sida has invested considerable human and financial resources to ensure that the gender equality goal is implemented in development co-operation programmes. Staff have undertaken gender training, and many hand-books, prompt sheets and other types of “how to do it” guides have been prepared for the use of programme officers in Stockholm and in development co-operation offices abroad. Specific positions to support the gender equality perspective in development co-operation have been created at headquarters, in embassies and within specific projects and programmes. What has been the result of this investment of resources?

Although Sida has commissioned other gender equality evaluations, both desk and field studies, most of these have not assessed the changes towards gender equality that might be attributed to development co-operation programmes. In 2000, Sida therefore commissioned an *Evaluation of Sida’s support to development co-operation for the promotion of Gender Equality* with three objectives:²

- To assess how Sida’s mainstreaming strategy is reflected in the country strategy process;
- To assess the strategic and/or practical changes with regards to the promotion of gender equality that interventions supported by Sida have contributed to or may contribute to; and
- To provide an input to a deeper understanding of the concrete meaning of concepts in interventions supported by Sida: gender equality, empowerment of women, stakeholder participation, strategic and practical changes with regard to gender equality and mainstreaming.

The evaluation included three country case studies. This report covers the South African country study, the other two being Nicaragua and Bangladesh

¹ *Policy – Sida’s Action Programme for promoting equality between women and men in partner countries*, Department for Policy and Legal Services, April 1997

² See Terms of Reference for the Evaluation, Annex 1

that are the subjects of separate reports. The remaining sections in this chapter deal with the scope of the South African case study, the analytical dimensions of the key evaluation issues and the methodology.

The next chapter of this report introduces the South African environment for gender equality – the context for the Sida country programme and the individual interventions.

The third chapter focuses on two aspects of Sida's development co-operation programme in South Africa: the Country Strategy that lays the basis for co-operation during 1999–2003 and Sida's dialogue on gender equality with the South African government, with the selected interventions and with civil society.

The fourth chapter introduces the four South African interventions selected for detailed study and discusses two important dimensions of working with gender equality in these interventions: their gender equality goals and the process of mainstreaming gender equality. Three other dimensions of working with gender equality are covered in subsequent chapters: the relationship between poverty reduction and gender equality, stakeholder participation and changes in gender equality, including locally constructed meanings of the concepts under study.

The last chapter summarises and discusses the lessons that have been learned, focusing in particular on opportunities that can be taken to continue to advance the gender equality goal in Swedish-South African development co-operation generally and in Sida's work in South Africa specifically.

1.1 Scope of the South African Case Study

The South African study team was responsible for assessing the treatment of gender equality issues in the Country Strategy and for analysing the four interventions that had been selected for detailed study. These were selected by the Department for Evaluation and Internal Audit at Sida based, in part, on the criteria that gender equality was reportedly mainstreamed in each and may have contributed to changes with regard to gender equality. These interventions, the first two in the democratic governance sector and the last two in the urban development sector, are the following:

- Statistics South Africa,
- Local Government Development Support Programme,
- Comprehensive Urban Plan, and
- Trees, Paving and Lighting.

The South African country study took place from 22 April through 11 May 2001. The members of the team were:

- Bonnie Keller, team leader, independent consultant contracted to Goss Gilroy Inc.

- Pethu Serote of the Gender Education and Training Network, national consultant
- Kgotso Schoeman of Kagiso Trust, national consultant
- Sarah Forti of COWI Consulting Engineers and Planners
- Britha Mikkelsen, overall evaluation team leader from COWI who participated from 6–12 May
- Susanne Possing of Sophia Consultancy, contracted to COWI

The key issues covered by the South African case study, as well as those in Nicaragua and Bangladesh, are drawn directly from the Terms of Reference for the overall evaluation and from supplementary meetings and discussions between the evaluation team members and the responsible department at Sida, UTV. These key issues may be summarised as follows:

1. To what extent is Sida's mainstreaming strategy reflected in the *country strategy process* for South Africa?
 - a. What has been the quality of the gender analysis in the country strategy process?
 - b. To what extent and how is gender equality promoted in the dialogue with the partner country during the process?
2. What has been the *gender equality content* of the four Sida-supported interventions in South Africa? More specifically:
 - a. To what extent have the interventions focused on gender equality as a priority? Is the *goal* of gender equality reflected in the design and implementation (and evaluation and monitoring) of the interventions? What obstacles are present which could prevent the interventions from addressing gender equality? What opportunities are present?
 - b. What evidence exists of the use of a *mainstreaming strategy* to integrate gender equality in the interventions?
3. What is the relationship in each intervention between the pursuit of gender equality as a goal and the need to address *poverty reduction*? Are there real or potential synergies between the two?
4. *Which changes* have occurred in the gender equality situation as a result of the interventions? To what extent have there been changes to meet the *practical gender needs* of women and/or to advance their *strategic gender interests*? Have the interventions had a positive effect on *women's empowerment*? Have they addressed, and/or led to changes in *male roles*?
5. How can the experience of the South African country strategy and the four interventions reviewed assist in a deeper understanding of the use and *meaning of the concepts* of gender equality, empowerment of women, stakeholder participation, strategic and practical changes with regard to gender equality, mainstreaming and men and male roles?

In attempting to address these key evaluation issues the three country study teams have been guided by the intention to draw out lessons for future policy and strategy revision and for the application of these lessons in practical development co-operation, rather than shedding light only on past performance.

1.2 Analytical Dimensions of the Key Evaluation Issues

Beginning with an Inception Workshop in Stockholm in March 2001, the evaluation team worked on conceptual and analytical issues and frameworks through which the Terms of Reference could be more concretely applied and in order to bring consistency across the three country case studies. In order to provide a concrete background to the analysis that follows in this report, it is useful to briefly outline some of the ways in which the evaluation team framed its analysis of key issues within the context of Sida's programme and of conditions in South Africa.

1.2.1 Dialogue on Gender Equality

The Terms of Reference for the evaluation emphasised the importance of a dialogue on gender equality between the Government of Sweden and partner governments in order to ensure shared commitment to this important goal. In addition, the discussions between the evaluation team members and staff at Sida headquarters in Stockholm pointed out the way the dialogue on gender equality may supplement specific gender equality actions in bilateral interventions. In essence, a number of Sida officers reminded team members that what happens outside of specific interventions in the form of dialogue may be equally important to what happens within the interventions.

In order to adequately assess the issue of dialogue and its use in promoting gender equality, the South African study team examined three types of dialogue:

1. Direct government-to-government dialogue on gender equality between the Governments of Sweden (represented by the Swedish embassy and its staff) and the Government of South Africa but outside the dimensions of specific interventions;
2. Formal and informal dialogue on gender equality within the context of specific interventions using the four case study interventions as test cases; and
3. Dialogue between Sida and specific civil society organisations.

1.2.2 Defining Gender Equality Goals

As indicated in *Sida's Action Programme for promoting equality between women and men in partner countries*, equality between men and women represents a goal of Swedish Development Co-operation with mainstreaming selected as the defining strategy for achieving that goal. Against the background of the Action

Programme, the South African evaluation team needed to establish a reasonable level of expectations when examining the four interventions for goals in gender equality. Given the fact that the Sida's *Action Programme* (with its constituent Policy and Action Programme) was officially published in April 1997 and was pre-dated by a considerable body of Sida-published work on gender equality³, it seems reasonable that Sida supported development co-operation interventions developed in South Africa after the first democratic elections in 1994 would exhibit some formal commitment to gender equality goals.

The four interventions studied in South Africa were initiated in 1996–97, one before publication of the *Action Programme* and the other three immediately thereafter. However, work on the Programme had generated considerable interest and commitment within Sida in the period prior to its publication. Therefore, it seemed reasonable to the South African evaluation team to assume that gender equality goals would be, to some degree, reflected in the design of all four evaluations. The presence of an explicit gender equality goal was felt to be important in guiding activities within an intervention and in enhancing the possibility that an intervention would significantly effect unequal relationships between women and men.

It was important for the team to establish which goals in gender equality should be reflected in the design or implementation of an intervention. As pointed out in the *Inception Report* prepared during the first phase of this evaluation, Sida's *Action Programme* provides a working definition of gender equality:

Equality between women and men refers to the equal rights, responsibilities and opportunities of women and men and girls and boys. Equality is not a women's issue but should concern and engage men as well as women. Equality does not mean that women and men will become the same but that women's and men's rights, responsibilities and opportunities will not depend on whether they are born male or female. Equality includes both quantitative and qualitative aspects. The quantitative aspect concerns the equal distribution of women and men in all areas of society. The qualitative aspects refers to the need to give equal weight to the knowledge, experience and values of both women and men as a means of enriching and directing all areas of societal development. Equality between men and women is seen as both a human rights issue and a pre-condition for and indicator of sustainable people centred development.

Therefore, an attempt to address gender equality should consider and deal with:

- Socially defined roles and expectations;
- Changes in gender relations;
- Variables over time and geography;
- Power and inequality;

³ For example, *Gender Equality in Development Co-operation; Taking the Next Steps*, Sida 1995; *Gender Equality Experience and Results Analysis Exercies*, Beth Wormiuk for Sida, 1996. *Mainstreaming: A Strategy for Achieving Equality Between Men and Women*, 1996.

- Institutions, and,
- Multidimensional links to economic, political and social interactions.

This characterisation of gender equality in terms of a fairly complex set of relations between men and women was of critical importance to the analysis carried out by the South African evaluation team since it meant that simple targeted levels of participation by women cannot – in themselves and in the absence of any evidence of a change in the relative situation of men and women – really be seen as gender equality goals since they often may not represent any effort to address inequalities.

1.2.3 Mainstreaming

If gender equality goals deal with “what” is intended to be achieved in gender equality, mainstreaming confronts the issue of “how” to achieve those goals and is, therefore, closely linked. Sida’s *Action Programme* says that mainstreaming implies that “attention to equality between women and men should pervade all development policies, strategies and interventions.” It requires that “analysis is made of the potential impact on women and men of development interventions” and that both are involved in setting goals and in planning so that an intervention meets the priorities and needs of both women and men.⁴

During the Inception Workshop in Stockholm, the members of the evaluation team developed a six-point classification system to assess the level of mainstreaming in a given intervention. The scale was structured as follows:

1. *Zero* mainstreaming, which is quite self-explanatory and implies either no mention of gender equality or an obviously superficial reference;
2. *Pro Forma* mainstreaming, meaning that a superficial token sentence or paragraph is found in project design documents with no evidence that it effected the structure or activities of the intervention;
3. *Integrated* mainstreaming, meaning that a systematic gender analysis was done but that there is little or no evidence that it effected project design;
4. *Institutionalised* mainstreaming, meaning that the findings and results of the gender analysis were evident in some aspects of intervention design;
5. *Implemented* mainstreaming, meaning that the intervention went ahead and implemented the gender equality changes suggested by the gender analysis; and,
6. *Monitored and evaluated* mainstreaming, meaning that systems for monitoring and evaluating the interventions gathered the necessary data and conducted the appropriate analysis to report on the gender equality results of the intervention.

This scale represents a process model of mainstreaming and attempts to identify how and where considerations of gender equality should inform the

⁴ *Sida’s Action Programme, explanation of mainstreaming on inside cover*

project identification, design, implementation, monitoring and evaluation cycle in major bilateral interventions supported by Sida. The evaluation team assumed that interventions would exhibit some evidence of having moved through the mainstreaming process in a logical way. It was further assumed that important components of mainstreaming, such as gender analysis – also highlighted in the evaluation Terms of Reference – would be of critical importance.

1.2.4 Poverty and Gender Equality

A key issue for this evaluation concerns the extent to which the goal of gender equality supports, and is supported by, Sida's overarching objective of poverty reduction. In other words, to what degree are there synergies and complementarities in efforts to reduce gender inequality and efforts to reduce poverty?

The evaluation worked on the basis of Sida's multi-faceted understanding of poverty, that raising the quality of life of poor people "is not a matter simply of improving the incomes of the poor. It consists also of guaranteeing the poor, particularly women and children, their human rights and freedoms, opening up their range of choice, improving their environment and security and enabling poor women and men to participate in development processes."⁵ Thus, the evaluation team tried to take account of the ways in which poverty reduction is related not only to income and consumption (improved livelihoods) but also the poor's access to services, and to improvements in their knowledge and rights.

In addressing this issue, the evaluation team had to assess whether and how poverty was defined and analysed in the South African Country Strategy and in each of the four interventions. It was important to know if and how the poor had been defined and targeted in each intervention and how much was known about the different ways in which women and men, girls and boys, experience poverty. In particular, the team tried to assess whether and how efforts to reduce poverty had been or would be improved in their effectiveness by linking these to gender equality considerations in the interventions.

1.2.5 Stakeholder Participation and Gender Equality

The Inception Report proposed that participation of stakeholders in the design, implementation, management, monitoring and evaluation of projects and programs in development co-operation could be assessed using a scale that ranks stakeholder participation across seven different levels:

1. Passive participation, where stakeholders only receive information;
2. Participation in information giving, as in surveys;

⁵ *Sida's Poverty Programme; Action Programme to Promote Sustainable Livelihoods for the Poor and to Combat Poverty*, Sida, December 1996, pp. 1–2

3. Participation by consultation, where stakeholders do not participate in decisions and where the implementing agency has no obligation to take their views into consideration;
4. Participation for material incentives, where stakeholders for example receive cash in return for their labour;
5. Functional participation, where stakeholders are asked to form groups to meet pre-determined project objectives;
6. Interactive participation, where stakeholders participate in joint analysis leading to Action Programmes and the formation of new local institutions;
7. Self-mobilisation, where stakeholders take initiatives independent of external institutions.

The Inception Report also emphasised that stakeholder participation should be examined from the perspective of three groups:

- *Primary stakeholders* are those who will be directly or ultimately affected by the intervention, either positively or negatively;
- *Secondary stakeholders* are intermediaries such as implementing organisations, or other individuals, persons, groups or institutions involved in an intervention (including funders);
- *Key stakeholders* are those of the primary and secondary stakeholders who can significantly affect or influence an intervention either positively or negatively.

The challenge for the South African evaluation team was first to establish the level of primary stakeholder participation in the intervention (regardless of gender concerns) and then to identify the extent to which women, men, youth and children could be seen as participating in ways that promoted gender equality. Primary stakeholder participation was viewed as crucial in enabling the priorities and views of both women and men to be put forward and to influence intervention design and the course of implementation.

1.2.6 Changes in Gender Equality

Having examined each intervention to see the extent to which they included gender equality goals; how they did or did not reflect a mainstreaming approach to gender equality; how poverty reduction and gender equality inter-related; and, how participation did or did not contribute to understanding gender equality needs and actions, an important question remained for the South African evaluation team: What changes in gender equality have occurred as a result of or with a contribution from these four interventions, among other factors?

In examining gender equality changes related to the four interventions, the evaluation team looked at four aspects of gender equality:

- a. What qualitative and quantitative changes in gender equality can be linked to the interventions (or to situations which the interventions have contributed to)?
- b. Have the interventions had a positive effect on women's empowerment;
- c. Have the interventions identified a need for changes in male roles and the definition of masculinities and have they contributed to such changes?
- d. Have the interventions contributed to changes and improvements in meeting women's practical needs and advancing their strategic interests?

In the absence of a sector or intervention specific baseline analysis of gender conditions, the South African team relied on either quantitative descriptions of the gender equality related outputs of projects (where available) or on observed and reported differences among women and men project beneficiaries to assess the type and level of gender equality changes associated with each intervention.

The team also focused on different dimensions of the reported changes in gender equality associated with the four interventions. These include empowerment and practical and strategic changes in gender equality.

Empowerment

The *Inception Report* discusses some of the characteristics of women's empowerment found to be particularly relevant in assessing the changes brought about in some relation to the four interventions examined in South Africa:

- Empowerment is not something that can be done to people; rather women need to be the agents of their own empowerment. Outsiders and outside organisations can help to create the conditions favourable to women's empowerment;
- Empowerment can occur at the personal, relational and collective levels where it has different meanings:
 - *Personal* empowerment involves developing a sense of self and individual confidence and capacity. It involves undoing the effects of internalised oppression;
 - *Relational* empowerment involves developing the ability to negotiate and influence the nature of a relationship and the decisions made within it;
 - *Collective* empowerment occurs when individuals work together to achieve a more extensive impact than each could have had on their own.

In addition, the evaluation team felt that empowerment included important elements of knowledge, self awareness, and self esteem for women (whether personal or collective) and that it required not only knowledge of the rights of women but some means – addressed within or outside the intervention – to put that knowledge into practice. The team also recognised that empower-

ment of poor men is as important in reducing poverty and contributing to gender equality as women's empowerment.

Practical and Strategic Changes in Gender Equality

In addressing this issue, the South African study team was guided by the definitions of practical and strategic needs and interests presented in the *Inception Report*, which defined the two categories as follows:

Practical gender needs and changes

Practical gender needs derive from daily living conditions and the prevailing gender roles of women and men. Therefore, women and men – when consulted separately – will often identify different practical needs, for example women for an easily accessible water source and men for roads. Because practical gender needs are related to daily living conditions and to women's and men's need to meet their basic welfare requirements, they are quite easily perceived and articulated. Because practical needs are embedded in the existing gender-based division of labor, women and men may agree on the changes but realizing these needs may still be problematic.

Strategic gender interests and changes

Strategic gender interests are related to power structures and derive from the subordinated position of women in relation to men. Strategic gender interests exist at several levels, for example women's lack of voice within the household, women's lack of influence on decision making in government and lack of recognition and value placed on unpaid household work in national accounts.Strategic gender changes are related to strengthening women's position in society *in relation to men*. These changes include women's increasing consciousness of their subordination, increasing their opportunities for choice and self-determination, and organising together to bring about transformation of their own position and of the prevailing social order in which they live. Strategic gender interests and changes are, therefore, highly contested.

The evaluation team recognised that there is not likely to be a clear division between practical and strategic changes – that, for example, a practical change could well establish important conditions that might lead to strategic change. The team also recognised that men as well as women have practical needs and strategic interests.

1.3 Methodology

The South African country study used the same methods and approaches as the study teams in Nicaragua and Bangladesh. These methods and approaches were planned at a core team meeting in January 2001 and were refined at a subsequent core team meeting in March. The substantial work that was done prior to the first country study in Nicaragua on thematic concept papers, sector-specific prompt sheets and evaluation methods provided a common foundation for all three country studies. The South African team benefited from the Nicaragua study, as this team shared its experiences with

using the approaches and methods before the South African team went to the field.

The major methodological aspects of the South African country study are as follows:

Document Review:

Prior to the fieldwork, the evaluation team received from UTV, Stockholm, a large selection of documents on the South African country strategy and on the four interventions. Document reviews were prepared on each intervention before fieldwork began. This made it possible to become familiar with the South African country programme and with the interventions, to prepare draft study objects and to formulate hypotheses to be tested in the field. The initial document review was supplemented by additional documents that the evaluation team received from the Embassy in Pretoria and from project management in the four interventions. (see Annex 8)

Interviews with Sida programme staff, former managers of interventions and consultants:

In order to get an overview of the way that Sida staff work with the gender equality goal, particularly in relation to the overarching goal of poverty reduction, members of the South African evaluation team had the opportunity to interview selected programme officers in Stockholm during the inception phase of the evaluation. In addition, before going to South Africa the team interviewed, either personally or by telephone, consultants who had worked with the interventions in the past, former managers of the interventions and ex-Sida programme officers who had been involved in preparing the Country Strategy. These initial interviews were important in giving a greater depth of understanding and in raising key questions about the Country Strategy and about the interventions, beyond information provided in documents, which could be further explored during the country study.

Draft Analytical Frameworks/Study Object Grids:

A great deal of work went into preparation of the draft study object grids – one for the Country Strategy and one for each of the four interventions. These became the main evaluation tools used in the field, serving as a reminder of the main assessment areas to be covered and providing a sound basis for detailed questioning. The study object grids were revised, as necessary, as fieldwork proceeded. (see Annex 3)

Preparation of Country Study Agenda:

The national consultants took the responsibility to prepare the three-week Agenda for the country study. By the time the evaluation team assembled in Pretoria, the Agenda was already very full with interviews, participatory focus groups and mini-workshops. Although a good number of interviews and focus groups were added during the course of fieldwork, and although there were to-be-expected changes of plans, in general the Agenda that had been prepared in advance facilitated the efficiency with which the country study was conducted. (see Annex 6) In addition to the five members of the South African evaluation team, two officers from UTV, Sida's Department of Inter-

nal Audit and Evaluation, participated in fieldwork, one for two weeks and the other for slightly more than one week.

Data Collection:

The South African evaluation team worked intensively for three weeks to collect relevant data. Open-ended and semi-structured interviews were held with a large number and wide range of stakeholders of the three different categories (key, secondary and primary), either individually or in small groups. These included Embassy staff in Pretoria, dialogue partners at national and provincial levels, the national machinery for promoting gender equality in South Africa, non-governmental organisations and coalitions, and key and secondary stakeholders associated with the four interventions. In some cases, where relevant actors such as former programme staff and managers of partner institutions had moved to different jobs, we were able to contact and meet them.

The South African team was fortunate that three of the four interventions were located in Northern Cape Province, that two (CUP and TPL) were implemented by the same institution (Kimberley municipality) and that the fourth (Statistics SA) also had a provincial office. This geographic concentration made fieldwork easier. Two members of the team spent one week in outlying parts of the huge province in order to get a more representative understanding of LGDSP.

The evaluation team conducted a number of group discussions and participatory focus groups with secondary and primary stakeholders – project implementers and community-level beneficiaries. These included:

- 1) a group discussion with statistics officers who received Statistics in Action Course (STAC) training
- 2) a mini-workshop with provincial statistical users and the provincial office of Statistics SA
- 3) a group discussion with the KCC/City Engineer's Department, with planners involved in CUP and TPL
- 4) a participatory focus group with residents and councillors in Roodepan, a pilot housing area under CUP
- 5) a participatory focus group with women beneficiaries of the (CUP) Urban Agriculture and other community development projects
- 6) a participatory focus group with female councillors appointed to standing committees in the Kimberley City Council
- 7) a discussion group with members of the Gender Mainstreaming Task Team, Kimberley City Council
- 8) a participatory focus group with representatives of member organisations in the Network on Violence against Women, Kimberley
- 9) a focus group with the Children's Issues Task Team (LGDSP) in Calvinia
- 10) a discussion with school children in Calvinia

The method used for the participatory focus groups was Participlan, in which the facilitator strives to bring out the views of all members of the group, gets them to prioritise their answers to open-ended questions and (where relevant) give their views about what has changed. (see Annex 7 for list of persons met)

In order to meet community members in a less formal setting, members of the team took two “street walks” through Galeshewe and Vergeneog, residential neighbourhoods in Kimberley where urban development interventions had been located, and had the chance to speak with residents.

The South African team worked in pairs, with two members responsible for each intervention and two people present at each interview or focus group, all of which were thoroughly prepared in advance. The sectoral prompt sheets that had been prepared during the Inception phase of the evaluation were checked, before interviews or focus groups, to ensure that all relevant issues were addressed. The Analytical Frameworks/Study Object Guides proved invaluable as the main evaluation tools, as these guided the preparation for and direction of interviews and focus groups.

Two interventions had been completed, and a third had finished its first phase, at the time the country study took place. This constituted a limitation to the evaluation, as the team was not able to observe on-going activities and to meet primary and secondary stakeholders who were actively involved. However, the team made efforts to identify and meet a representative sample of those who had been involved in past activities.

Other limitations to the country study were as follows:

- the large size of one partner institution (Statistics SA), which made it necessary to focus on certain components of the intervention which would have been expected to show evidence of gender equality mainstreaming;
- the geographic spread of LGDSP, which worked with municipal task teams in towns, or clusters of small towns scattered throughout the vast province, making it necessary to focus on four task teams in which gender equality mainstreaming would have been expected; and
- the short time that the team had in the field to undertake an evaluation covering a great number and variety of analytical issues.

In general, the team tried to address these limitations by going as deeply as possible into the key analytical issues with selected key informants and carefully chosen groups of primary stakeholders, rather than trying to cover, much more shallowly, a broader area – either institutionally or geographically. Thus, the South African evaluation may be said to have “mined deeply” rather than broadly, as was the case with the other two country studies.

In analysing and presenting its findings, the South African team decided to include as many “voices” of stakeholders of all three types in the report as possible. The intention was to give readers a sense of the real individuals who have been involved in and/or affected by an intervention and to allow their

views to be heard. It is important to note, in this connection, that a single or particular “voice” is not meant to indicate that this is the only evidence for a point of view or an experience. The individual views quoted in this report are representative of views and experiences that the evaluation team was able to cross-check with other informants and against other bodies of data.

Team Meetings:

Throughout the country study period the evaluation team met regularly. We practiced our methodologies – such as role-playing interviews; designed together a participatory focus group that would take place within a few days; and shared and analysed our findings. In order to prepare for the debriefing at the Embassy, the team worked together in pairs to draft agreed upon sections of the document and then met to review and to revise together.

Therefore, much of the data that had been collected had already been thoroughly discussed and analysed by the evaluation team before the end of the fieldwork period. Members of the team prepared written briefs on their areas of responsibility, elements of which were incorporated into the draft report.

Debriefing and Round-Table Discussions with Interventions:

In addition to the debriefing at the Embassy, where all team members presented a section of our collective work, four final reporting-back and round-table discussions with intervention stakeholders were held: two with Statistics SA (Kimberley and Pretoria), one with the provincial Department of Housing and Local Government with regard to LGDSP and one at Kimberley City Council for the two urban development programmes. Reactions of participants at these meetings are included among the evaluation findings.

Draft Report:

The draft report was circulated by UTV to other stakeholders, and the helpful comments received are reflected in this subsequent version of the report.

Chapter 2

The Environment for Gender Equality in South Africa

2.1 The General Situation

The Constitution and Legislation

The issue of gender equality in South Africa has become more visible with the change of government from the *apartheid* system to democracy in 1994. The Constitution provides the foundation for gender equality with human rights as its basis, including the equality clause. The Constitution provides specifically for gender equality, affirmative action, freedom and security of the person and socio-economic rights. It also requires that customary law be subject to the Bill of Rights. The Constitution requires legislation for the attainment of equality to be in place by 2002, which will give a basis to address legal discrimination based on gender.

Parliament has already made some progress to pass legislation meant to change both the position and condition of women. Examples are the Choice of Termination of Pregnancy Act (1997) and the Domestic Violence Act, Maintenance Act and Customary Law Act (all 1998). Labour laws, some of which excluded the vast majority of women workers, have also been reviewed and updated, and other new laws have come into place such as the Labour Relations Act (1996), the Basic Conditions of Employment Act (1998), the Employment Equity Act (1998) and the Skills Development Act (1999). These also constitute a good basis for work on gender equality.

However, a large number of discriminatory acts from the past still exist; in particular the Customary Law of Succession Act still prejudices the inheritance rights of women. The Births, Deaths and Registration Act bars married women from retaining their surnames or passing these to their children without the approval of the Department of Home Affairs. The principle of equal pay for work of equal value is still unresolved. Occupations traditionally done by women are grossly under-valued.

International commitments

South Africa is signatory to important conventions meant to advance women and realise gender equality. In 1995 the government ratified the Convention

on the Elimination of All Forms of Discrimination Against Women (CEDAW) with no reservations. In 1998 the first Country Report was submitted to the CEDAW Committee, accompanied by a shadow report from NGOs working in the area of violence against women. South Africa has also adopted the Beijing Platform for Action and prioritised five areas of concern that the country will focus on: women and violence, poverty, health, education and economic empowerment.

The Government and Political Environment

Government structures for working towards the advancement of women and gender equality have been put in place. These constitute South Africa's "national machinery for gender equality." They include the Office on the Status of Women (OSW) in the Office of the President which co-ordinates the functions of the national machinery, including Gender Desks or Units in various government departments. Statutory bodies include the Commission on Gender Equality (CGE), a multi-party Women's Parliamentary group/caucus and the Parliamentary Joint Monitoring Committee on the Improvement of the Quality of Life and Status of Women. The machinery has linkages to and is replicated in the provinces. It is meant to influence policy formulation, review legislation and make policy analysis, co-ordinate monitoring and implementation and undertake advocacy for gender equality.

An additional role for these structures is to mainstream gender in all legislation, government policy, planning and other related activities. South African women have deliberately resisted the establishment of a separate bureaucracy for women. The goal is that the national machinery will transform the institutions, policies, procedures, consultative processes, budgetary allocations and priorities of government to take account of the needs and aspirations of women and reduce gender inequalities. Even though it may not be labelled as such, this is a mainstreaming strategy to integrate gender equality concerns into the structures, processes and policies of government.

However, there are several important challenges. Although both the legal and political environments can be regarded as enabling of gender equality, the biggest challenge is the implementation of programs aimed at attaining this goal. There are no plans in place to ensure that legislation is implemented, and monitoring systems are very weak. There are also no deterrents or penalties for non-compliance, thus allowing many institutions to ignore the laws and policies for gender equality.

In general, gender structures in government remain weak and under-resourced. They are often linked to transformation units that focus largely on internal transformation. "Transformation" in the South African context refers to the urgent need for wide-ranging changes within institutions, and the people that comprise them, to reverse the biases, including work relationships and racist attitudes, inherited from the *apartheid* years. Transformation includes affirmative action to recruit blacks, women and disabled persons and to enable them

to advance into leadership positions. Transformation units, including gender officers, are often more concerned with internal gender issues, such as changes in the representation of staff from different population categories, than they are with the larger issue of mainstreaming gender equality considerations into service delivery. Most of the people entrusted with advancing gender equality do not yet have the knowledge, skills and experience to be effective in mainstreaming gender equality within government.

South Africa's Parliament has the highest percentage of women members (28% in 1999) of any African country. This demonstrates the impact of the African National Congress policy of promoting women's participation through a quota system. However, the representation of women in national politics has not yet translated into a concerted effort to promote important aspects of gender equality. For example, the National Gender Policy has not yet been published. This vacuum has led to other initiatives, including the CGE's *A Framework for Transforming Gender Relations in South Africa*.

NGOs and Other Organs of Civil Society

NGOs and other organs of civil society have played an important role to ensure that Parliament seriously takes up the issue of gender equality in government policies and legislation. Many of these organisations came out of the anti-*apartheid* struggle and the mass mobilisation of NGOs, CBOs, religious organisations, women's organisations and other special interest/issue-based groups in the 1980s. In addition, many of those who went into Parliament in 1994 came from these organisations. Parliament and its Committees were open to being lobbied, and NGOs and others took full advantage of this opportunity. The National Women's Coalition spearheaded this effort, and their work culminated in the document, *Strategies for Effective Equality*, which was adopted by Parliament in 1995 as a guide to the attainment of women's empowerment and gender equality.

Because of the history of South Africa, NGOs and CBOs are mainly represented in urban areas where most of the mobilisation around social issues took place. This has resulted in the absence of strong social movements in the rural areas. Most of the organisations that have taken the lead in lobbying for and working towards gender equality are women's organisations. The network of women's organisations has been particularly active and visible in working with violence against women, highlighting the threat of HIV/AIDS to women's lives by associating the spread of HIV with women's subordination in sexual relationships and working on the gender dimensions of poverty.

Gender policies and structures in other institutions such as the media and the private sector are virtually non-existent. This remains an enormous challenge because the private sector is both powerful and an important player in the economy.

There are other challenges as well. After 1994 NGOs and other organs of civil society went through a crisis. Leaders were recruited into government,

thus leaving a leadership vacuum in civil society. Funding agencies also moved their attention away from civil society organisations to government. These and other related problems resulted in a loss of direction and focus for NGOs, as well as loss of cohesion in confronting the challenges of repositioning that they faced.

History has shown that a strong and organised women's movement with a focused programme is able to drive the process towards gender equality forward. The momentum towards a unified women's movement that characterised the struggle against *apartheid* has now somewhat dissipated, as former leaders moved into government positions. The absence of a unified women's movement in South Africa is therefore a challenge.

Local Government as a Strategic Site to Promote Gender Equality

The South African government has three spheres – national, provincial and local, each with different responsibilities. Among the responsibilities of local government are air pollution control, building regulations, child care facilities, electricity, fire fighting services, public transport, municipal public works, storm-water management, trading regulations, water and sanitation services, to mention a few. The specific responsibility for delivery of services makes the local government sphere the ideal site to impact on gender inequalities. Most South African women are still locked up in reproductive work. Good and adequate services, delivered efficiently, will lessen the burden on them and therefore open up opportunities for them to develop themselves in different ways. For example, adequate street and house lighting would make it easier and safer for women and men to take advantage of adult education opportunities, mostly provided in the evening.

One challenge is that local government is the most resource-poor of the three spheres, and the rural local government structure the poorest, receiving about two per cent of the central government budget. Most of the people living in the previously neglected rural areas, especially in the former “homelands” under *apartheid*, are not able to pay for services from which other local government revenues come, and this diminishes the resources available for local government to be effective. The Northern Cape provincial local government receives the smallest allocation of any province because of the sparseness of its population. In rural provinces such as the Northern Cape, where poverty is most acute, the limited financial resources of local government is a serious problem.

A second challenge is that when South Africa's machinery for gender equality was conceptualised, there was not enough thinking on how local government would fit into the picture. This lack of clarity has plagued local government structures since the first elections. At the moment the South African Local Government Association (SALGA) is responsible for gender equality within local government.

2.2 Northern Cape Province

Most of this report deals with interventions located in Northern Cape Province (NCP), which has its own unique history and social characteristics. One cannot generalise from the Northern Cape to the rest of the country, or vice versa. The main features of the province, particularly those relevant to the gender equality situation, are that it is the largest province (362,000 square kms out of South Africa's total 1,219,090 square kms), predominantly semi-desert and rural, with a small population and vast distances between towns. The main sources of income are mining, fishing and agriculture, sectors that have always employed more men than women. Although the largest of South Africa's provinces, the Northern Cape has the smallest population (c 0.7 million persons), 73 per cent of them living in rural-like conditions in very small towns. Like most rural and small town areas, joblessness and poverty levels are very high.⁶

NCP is largely Afrikaans speaking, reflecting the previous political predominance of white Afrikaners. There are more coloured persons in the province than Africans.⁷

Previous to new provincial demarcations in 1994, NCP was part of Cape Province and was serviced mainly from the provincial administration in Cape Town. Most of the NGOs active in what is now NCP were also based in what is currently the Western Cape Province. After 1994, NCP lost its contacts with Cape Town. Since then, the province has struggled, not only with creating its own identity but also with developing a resource base for its existence. The educational and skills levels are sparse. One of the biggest challenges has been to establish new organs of civil society to take up issues of development, including promoting gender equality. The province has established the provincial wing of the national machinery, but it has suffered from a weak structure and the lack of NGO support.

2.3 Major Issues and their Implications for Gender Equality

This section gives a short overview of some of the major societal issues, and their relation to gender equality in South Africa.

Poverty

Fifty per cent of the nation's population is poor, and 72 per cent of these are to be found in the rural areas, disproportionately women and their dependants. Sixty per cent of female-headed households are poor compared to 31

⁶ The statistics come from *Living in Northern Cape; Selected findings of the 1995 October household survey*, Central Statistics 1998.

⁷ See Annex 5 for selected statistical indicators for NCP.

per cent of male-headed households.⁸ Documenting the dimensions and multi-faceted aspects of poverty in post-*apartheid* South Africa began only in 1998 with publication of a poverty and inequality report, from which these figures are taken. Although the racial and regional dimensions of poverty are now increasingly better documented, the gender dimensions of poverty have not been thoroughly analysed because of lack of information.⁹ This has implications for the South African country programme, and for the four interventions, in that the links between gender equality and poverty reduction have not been widely discussed.

Livelihoods

The most visible “face” of poverty in South Africa is the income and consumption side, with inadequate sources of income from wages, self-employment, pensions and remittances relegating many women, men and children to a low standard of living and a precarious existence. The figures in Annex 5 give some indication of gender differences in Northern Cape Province, showing for example that employed women earn far less than men as one goes from lower to higher income brackets (figure 10) and that women employees are concentrated in low-paying employment sectors such as domestic work in private households (figure 9). Because of the high incidence of poverty that affects many men as severely as women, gender differences in how women and men experience poverty and what their options and constraints are to improve their economic situations are again not yet well documented or analysed. The interventions in the Northern Cape were not explicitly poverty reduction programs, but they were implemented against a background of severe poverty, the gender dimensions of which are largely unexplored.

Gender-based violence

Gender-based violence, including domestic violence, rape of women and increasingly of younger girls, and other forms of sexual assault including of boys, is extremely serious and receives substantial media attention. South African Police Services estimate that a woman is raped every 35 seconds and that at least one woman is killed every six days by her male partner. According to the National Research Council, one girl in three will be sexually assaulted before the age of 18. Sida supports an NGO coalition to combat gender violence in NCP, and awareness of the need for better physical security of women and children provided a backdrop to the urban development interventions that were assessed.

⁸ *Poverty and Inequality in South Africa: Report prepared for the Office of the Executive Deputy President and the Inter-Ministerial Committee for Poverty and Inequality*, by Julian May (ed.), 1998

⁹ *Women and men in South Africa*, Central Statistics, 1998 did not include data on all sources of household income, because this was not available; nor was intra-household data.

HIV/AIDS

The high transmission rates of HIV and the large percentages of persons living with or affected by AIDS is one of the most serious problems confronting South Africa. However, it is difficult to obtain figures on HIV incidence, broken down by sex and age. A rapid increase of HIV infection among teenage girls has however recently been documented.¹⁰ Nonetheless, health officials and civil society activists are engaged in demonstrating that women are more socially, culturally and economically vulnerable to HIV transmission and to AIDS than are men. To give a few examples: culturally, women are not allowed to negotiate safe sex with partners; sexual violence against girls and women is a high risk factor in transmission; women with poor livelihood prospects may enter sex work – another high risk factor, and the burden of caring for the sick and for orphans falls largely on women. None of the three interventions in NCP had factored the implications and impact of HIV/AIDS into programme activities, perhaps due to the fact that these interventions were initiated shortly before the seriousness of the pandemic had become a national issue.

Race

In South Africa gender inequalities exist in relation to and are reinforced by other social inequalities, in particular those related to race. Therefore, in tackling gender inequalities it is crucial that race becomes an integral part of the equation. Although the need to link racial and gender inequality may be obvious in theory, in practice this is a highly sensitive issue. Affirmative action, to increase the representation of previously discriminated against groups in public and other institutions, is being implemented in contexts where whites, especially men, continue to hold many senior positions. Thus, gender inequalities may be discussed and addressed, without factoring in racial inequalities. In NCP with its white Afrikaans-speaking population that had been privileged under *apartheid*, the racial and gender inequality links are still sensitive. In addition, there are more coloured persons, than blacks, in the province (see Annex 5, figure 1), making the picture of diversity and inequality even more complicated. In general, “inequality” in South Africa means racial inequality first and foremost, with gender divisions as linked to race given less prominence.

Approaches to gender equality in South Africa are affected by some of the factors briefly discussed here. The CGE’s *Framework for transforming gender relations in South Africa* is an excellent and hands-on guide to understanding and challenging the dimensions of gender inequalities in major sectors of social life. The *Framework* proposes an “empowerment approach (putting women at the center of all processes for change)” rather than a mainstreaming strategy. It is still new and not widely known or used. Analysis of unequal gender rela-

¹⁰ *Population, poverty and vulnerability: The State of South Africa’s Population Report 2000*, National Population Unit, p. 67

tions and the need to address men's roles in working towards equality is well advanced in specific areas, such as the campaigns against violence and AIDS. On the other hand, gender equality has a more limited meaning for many South Africans – that of increasing the representation of individuals, men and women, from racial groups that suffered from severe discrimination in the past.

Chapter 3

The Country Strategy and Dialogue on Gender Equality

3.1 The First Country Strategy in Democratic South Africa

Sweden and South Africa have a long history of partnership. Sweden gave extensive, long-term assistance, both moral and financial, to the struggle against *apartheid* by supporting the African National Congress in exile. Bilateral co-operation began in mid-1995, less than one year after the first democratic elections. In early 1998 the Swedish Government took a decision to prepare a Country Strategy for Development Co-operation with South Africa for the period January 1, 1999, through December 31, 2003.¹¹

Sweden's first Country Strategy with South Africa accommodated diverse interests about forms and content of development co-operation. On the one hand it was expected that Sweden should be an important partner in working with South Africa to overcome the legacies of the *apartheid* era, to address racial and other forms of inequality that had condemned the majority of citizens to an impoverished existence. On the other hand, South Africa was not a typical Swedish partner country because it fell into the Medium Development Group (according to UNDP assessment) and was not dependent on traditional forms of aid as are most of Sweden's other partner countries. Donor funding comprised less than one per cent of the central government budget, and there was potential to focus on mechanisms of economic co-operation such as trade and business alliances. Thus, the Country Strategy stated, as one of the general considerations of development co-operation, that:

“continued Swedish support is motivated primarily by the extreme income gaps and special difficulties that have been inherited from the apartheid period. South Africa is, however, a country with rich resources and good prospects within the foreseeable future of making itself independent of donor assistance. This perspective . . . opens the possibilities for development of new and long-term sustainable forms of co-operation.”¹²

¹¹ Country Strategy for Development Co-operation – South Africa, January 1, 1999–December 31, 2003, Ministry for Foreign Affairs

¹² *Ibid.*, p. 11

In the following sections, the gender equality content of four components of the Country Strategy process are reviewed:

- Country Analysis;
- policies and priorities of the South African Government;
- dialogue between Sweden and South Africa during Country Strategy preparation; and
- objectives and themes of Swedish Development Co-operation.

3.1.1 Country Analysis

The Country Analysis¹³ states, as strategic priorities, that gender and poverty issues should be approached “in parallel” on three levels: in dialogue with South Africa, by approaching all development interventions with a “gender and poverty perspective” and by interventions that are “directly aimed at gender and poverty.” At this time the gender equality situation, the poverty situation and the links between them had not yet been well documented in South Africa. The *apartheid* regime had collected statistics on only the minority of South Africans, and Statistics South Africa was faced with the task of documenting the regional, gender and other dimensions of poverty of all citizens in the new South Africa (see section 5.0). Therefore, inadequate data were available to make a detailed analysis in the Country Analysis. The Country Gender Profile had also not been prepared at the time.

Nonetheless, the Country Analysis contains one paragraph on the large number of female-headed households and the havoc wrought by *apartheid* on family life, women’s higher rate of unemployment by comparison with men’s, their lack of access to basic services and the high incidence of rape. It also states that co-operation with partners in urban development interventions showed a “distinct need for the planned activities in terms of gender and environment.” In general, poverty is said to have a “strong gender dimension.”

At the time that the Country Analysis was being prepared, work was also in progress throughout Sida to prepare the *Action Programme for Promoting Equality between Women and Men in Partner Countries* (1997). There was a great deal of commitment and work to ensure that key elements in the forthcoming *Programme* would be reflected in the South African country programme. “Gender advocates,” that is Sida staff in Stockholm and at the Embassy who were particularly committed to deliberate initiatives to advance gender equality, were active in the preparation of the South African programme. Thus, prior to the preparation of the Country Analysis, desk work had been undertaken to define priority themes for future development co-operation. A Project Assessment of Support for Democracy and Human Rights (1995)¹⁴ applied

¹³ Landanalys Sydafrika, UD 1996-12-19

¹⁴ Initial Project Assessment of Support for Democracy and Human Rights in South Africa, 1995–1998 (translation of Sida memorandum dated 7 November, 1995), ProMemoria DESO-1995-635

both a gender mainstreaming strategy as well as targeting of women in specific areas such as political participation. The Project Assessment identified women's strategic gender interests and proposed concrete types of intervention to enhance their ability to participate in decision making and to challenge unequal gender relationships. This Project Assessment was cited as a Best Practice in gender equality mainstreaming¹⁵ when Sida's experiences with working with gender equality were reviewed prior to the 1997.

The preliminary work on gender equality in what became the democratic governance sector and the links between gender equality and poverty are particularly evident in the Country Analysis and subsequently in the Country Strategy. Efforts to link gender equality and poverty to the urban development sector are not as evident. The statement in the Country Analysis about linking gender and urban development is not carried through into the Country Strategy, although the intent to ensure that all development interventions have a "gender and poverty perspective" is made clear.

3.1.2 Development Policies and Priorities of the South African Government

The Country Strategy was developed in the context of the South African government's own policy formulation initiatives. The Reconstruction and Development Programme (RDP), from 1994–1996, was "the de facto policy framework of the new government, functioning as a 'blueprint' for transforming social, economic and political structures within South Africa, in order to address past inequality and create a basis for growth and sustainability in the future."¹⁶

In 1996 RDP was subsumed within the Growth, Employment and Redistribution Strategy (GEAR), a macro-economic strategy "that places economic growth at the heart of the framework, identifying processes to guide economic transformation in the same way that political change has been designed and driven since 1994."¹⁷ The Medium Term Expenditure Framework (MTEF) was introduced in 1998, to link government's budgeting process and priorities to GEAR. The priorities of MTEF¹⁸ provided a framework for both government spending and development co-operation:

- meeting basic needs;
- accelerating infrastructure development;
- economic growth, development and job creation;

¹⁵ A Gender Equality Results Analysis of Three Regional Departments: Asia, Southern Africa and East and West Africa, by Bonnie Keller, September 1996 (prepared for the Experience Analysis in Sida's Action Programme for promoting equality between women and men in partner countries, April 1997)

¹⁶ SYNTHESIS REPORT, Development Co-operation Report II for South Africa, 1994–1999, International Organisation Development Ltd., November, 2000, p. 42

¹⁷ *Ibid.*, p. 43

¹⁸ *Ibid.*, pp. 47-8

- human resource development;
- safety and security; and
- transformation of government.

South Africa does not have a poverty reduction policy, and the draft *National Policy Framework for Women's Empowerment and Gender Equality* was not, and still is not, available as a guide for development co-operation. However, the 1996 Constitution made South Africa's priority regarding gender and other forms of equality clear.

South Africa's priorities in its co-operation with Sweden included an explicit reference to gender equality, stated in the Country Strategy as follows:

"The South African Ministry of Finance underlined already before 1997 that they wanted to focus development co-operation with Sweden on what South Africans call 'Democracy and Good Governance' and to build future, more long-term relations on exchange of experience, the transfer of technology and commercial investments. Moreover, support was requested for two cross-sectoral areas, namely gender equality and handicap issues."¹⁹

3.1.3 Key Elements of Swedish/South African Dialogue during Country Strategy Preparation

Dialogue during preparation of the Country Strategy took several forms: meetings between the Embassy and International Development Co-operation in the Department of Finance; semi-annual and annual consultations to discuss government-to-government co-operation; commissioning of studies, and networking. At the time of Country Strategy preparation, a Social Development Adviser (SDA) worked²⁰ with other Embassy staff (six, besides herself) to heighten the visibility and centrality of gender equality, poverty and other social issues in the preparation of the Strategy.

Official discussions between the two governments during preparation of the Country Strategy included key South African stakeholder institutions – Finance, Foreign Affairs, sectoral departments and the parliamentary Women's Empowerment Unit. Two key structures in the national machinery for promotion of gender equality – the Commission on Gender Equality and the Office on the Status of Women – were only in the process of being constituted at that time. Therefore, consultations with these were not possible. There was however general agreement on both sides on integrating gender equality as a priority area within the programme of co-operation. However, the Department of Finance informed the evaluation team that even after the Office on the Status of Women had been formed, it was too under-resourced to screen all donor-funded country programmes.

¹⁹ Country Strategy for Development Co-operation, op. cit., p. 10

²⁰ The post of Social Development Adviser (SDA) was a pilot initiative in two countries in Africa. In South Africa the post was filled from 1996 to 1999, when the initiative was discontinued. A local officer was subsequently employed at the Embassy from 1999 to 10/2000 to work with gender equality and HIV/AIDS issues. Currently there is a local HIV specialist working on contract.

Commissioning of studies to provide concrete information was seen as an important part of dialogue during preparation of the CS. The Embassy commissioned twenty-one studies on a wide variety of topics and themes as inputs to Strategy preparation. These studies were largely carried out by South African academics and researchers and were undertaken to “consult” (i.e. through research) a larger and more diverse spectrum of the population than would have been the case through more traditional forms of dialogue.

Two of these studies were extensive reviews and analyses of the gender equality and poverty situations in the country.²¹ Gender issues were mainstreamed in and linked to poverty analyses in both documents. The Country Gender Profile²² was discussed with diverse stakeholders at a workshop. The Embassy told the evaluation team that, in retrospect, the process of Strategy preparation could have included more extensive discussion with a wide variety of South African partners, rather than reliance on inputs from many studies, most of which were not later used.

Nonetheless, dialogue through networking between the Embassy and a wide range of key partners, particularly civil society organisations, was another strategy used to ensure that gender equality, poverty and disability issues featured in the CS. Representatives of some of these organisations told the evaluation team that the active networking by the SDA and other Embassy officers was supportive of their own efforts. The Embassy also engaged in networking by establishing a donor network on coordinating gender issues.

3.1.4 Objectives and Themes of Swedish Development Co-operation

The goals and direction of Sweden’s development co-operation with South Africa are clearly outlined in the Country Strategy, and the cross-cutting goal of gender equality is stressed (see box). The use of the term *permeate* indicates the intention to mainstream gender equality into all programmes, reinforced elsewhere by the emphasis on gender equality as a *common element* in the overall co-operation programme, in line with the im-

“The democratic transformation of society and the combating of poverty should continue to be the main objectives for development co-operation. The goal of promoting gender equality shall continue to permeate development co-operation. Furthermore, a strategic goal shall be established during the strategy period, namely to promote long-term, broader relations between Sweden and South Africa.”

Country Strategy, p. 14

²¹ *Country Gender Profile: South Africa 1998*, by Sally Baden, Shireen Hassim and Sheila Meintjies, Sida and Bridge, IDS; *Transforming Apartheid’s Legacy: The Evolving Strategy for the Reduction of Poverty in South Africa*, by J. May and I. Woolard

²² The *Country Gender Profile* is, to date, the best overview in South Africa of gender relations and the situation of women. It is widely known and used, especially outside the Embassy.

portance attached by South Africa to the “equality aspects of co-operation.”²³

Knowledge transfer between Sweden and South Africa and support to the building of competence and capacity are identified as important considerations for Swedish co-operation. So, too, is the intent to work with both government and civil society and to promote popular participation.

In outlining future areas of co-operation, gender equality features in two of the six sectors or areas discussed. Support to education will contain “targeted measures (affirmative action) to even out differences between former schools for whites, Indians, coloured and blacks [and] differences between men and women.” In democratic governance, “projects focused on increasing gender equality should be given priority.” Gender equality links are not mentioned under urban development and housing. Other forms of co-operation, with long-term implications, are also featured in the CS, such as business alliances, trade-related activity and pilot studies for commercial links.

Different stakeholders within Sida perceived the accommodation of traditional types of development co-operation alongside an increasing emphasis on economic co-operation in differing ways. The evaluation team heard two points of view.

In summary, gender equality as a priority cross-cutting theme is emphasised in the Country Strategy. The Strategy also makes clear that Sweden and South Africa are like-minded in their intention that development co-operation should support progress towards gender equality. The Strategy does not, however, completely follow through with its stated principal, that gender equality should *permeate* and be a *common element* in the overall co-operation programme. The need for a gender equality perspective is made clear and very explicit in the fields of democratic governance and education. A gender perspective in the areas of urban development and housing and in economic co-operation is not mentioned.

Analysis

The first Country Strategy for South Africa was clearly influenced by work on Sida’s *Action Programme for Promoting Equality*, which immediately preceded it. Gender advocates played an important role to ensure mainstreaming of gender equality considerations within the CS generally. This work is apparent in the sections of the CS on education and democratic governance.

At the same time, there were opportunities to make a more concrete analysis in the CS on the nature of the links, and potential synergies, between gender equality and poverty reduction since some information on this was available in the studies that Sida had commissioned. There were also opportunities to carry through with the mainstreaming principle, as stated in the CS. One opportunity that was not taken advantage of was in the discussion of co-opera-

²³ Country Strategy for Development Co-operation – South Africa, p. 14

tion in urban development and housing, where interventions were already underway. A second, and even more important, opportunity was to link gender equality issues to economic co-operation, especially since this aspect of development co-operation was likely to increase in importance in the future. Equality and economics is one of the priority areas in Sida's *Action Programme*. It will be important to examine, analyse and make these links explicit during the review of the CS, now underway, and during preparations for the next CS. There is already some experience with this in the South African programme, on which to build. The Results Analysis, for example, stated that past private sector development included micro-credits to small entrepreneurs, "not infrequently women entrepreneurs with families to support."²⁴

3.2 Dialogue on Gender Equality

The Country Strategy is a Swedish document, in contrast to the formal agreement between the governments of Sweden and the Republic of South Africa. It is supposed to be a basic frame of reference, against which the progress, during the five-year period, in achieving the goals and direction of development co-operation are to be measured. The direction of the CS is however discussed with South African stakeholders. One way of referring back to the goals and direction outlined in the Strategy is through dialogue about the development co-operation process in general and about specific interventions. Dialogue can take place on a wide range of issues – macro-economic policy, poverty and many others. The dialogue on Sweden's and South Africa's gender equality goals could include the relationship of gender inequality to livelihood acquisition, access to services and resources, to knowledge and rights and to decision-making – which are among the ways in which gender inequality and poverty are related. In general, the purpose of dialogue is to identify issues that will hamper development, or – if addressed – will foster development.

There is currently great interest in development circles about "dialogue," but no standards against which to measure its form and content. Although dialogue may be minuted, it is well known that key points and detail may fall away when verbal discussions are transformed into minutes. The evaluation team looked at the issue of dialogue, both by examining Agreed Minutes and by probing the memories of those who had been present at specific discussions or other occasions such as visits of Embassy staff to projects and programmes. Three types of dialogue are discussed here:

- government-to-government dialogue;
- dialogue on interventions; and
- dialogue with civil society.

²⁴ Country Strategy for Development Co-operation – South Africa, p. 9

3.2.1 Government-to-Government Dialogue

Government-to-government dialogue involves Sida staff from the Embassy in Pretoria, sometimes joined by Sida and/or Ministry for Foreign Affairs officers from Stockholm, and representatives of the South African government, from Department of Finance and other public institutions.

The Annual Consultations between Sweden and South Africa are the most important formal occasion during which dialogue takes place. The dialogue covers important national developments, both political and economic – such as new policies of the South African government – that are likely to affect development co-operation. On the Swedish side, developments among the Nordic donors or within the European Union may be shared. In the early years of development co-operation, all projects and programmes were reviewed one by one. Since 2000, the agenda has been organised around themes rather than interventions.

At Annual Consultations Sweden consistently refers back to the goals and direction of development co-operation, with the CS as the basic point of reference. Thus, the importance of the gender equality goal is always emphasised. [In giving Sweden's overview of social development issues] “a second cross-cutting theme was a very strong emphasis on gender equality. In this regard, apart from specific gender programmes, Sida was continuously striving to mainstream and integrate gender issues in its other programmes.” – *Agreed Minutes of 1998*

Beyond this, however, there is usually no further minuted discussion of gender equality at the Consultations, either in general or with reference to a discussion of a specific intervention or theme. Key local informants with whom the evaluation team spoke could not remember whether a discussion on gender equality in general or in relation to specific sectors had taken place, even if un-minuted. Now that the agenda of the Annual Consultations is organised by themes, however, there is an opportunity to go beyond the general reference to gender equality and to discuss specific gender equality issues, such as in economic co-operation, in some detail. The key representative from Department of Finance told the evaluation team that government was likely to support this.

In addition to the formal occasion of Annual Consultations, the Embassy also has the opportunity to engage in dialogue on a more informal basis by taking regular contact with various government partners. Although the Commission on Gender Equality and the Office on the Status of Women are now established and functioning, no recent contact has been taken with these. Also, the Embassy was frank that such contacts had been the responsibility of the SDA and her successor, and since then, there has been no follow-up. In general, understaffing and heavy work loads make it difficult for Sida officers to be as pro-active in initiating and sustaining dialogue as they would wish.

3.2.2 Dialogue on Interventions

Discussions about gender equality can take place between the Embassy (and/or officials from Stockholm) and its partners that implement interventions. Implementing partners include consultants (foreign nationals – usually Swedish) and South African officials who have project implementation as one of their responsibilities.

There was some dialogue about gender equality in pre-appraisal missions to assess three of the four interventions covered in this country study (CUP, LGDSP and StatsSA). As will be discussed in the sections on gender equality goals and mainstreaming (see 4.2 and 4.3), dialogue about a strong presence for gender mainstreaming in local government support had more impact than it did in urban development and statistical co-operation.

Personnel working with the interventions reported that there was extensive dialogue on gender equality with the SDA. The SDA was pro-active and supportive, visiting the programmes in the field, arranging for and facilitating at gender training workshops and in one case (TPL) insisting that more emphasis be put on participation as the project was being planned. At the same time, the role of the new post of SDA was not always clear to all concerned. Active networking and dialogue with intervention personnel was thought to have raised expectations about gender equality content in programmes, which they felt they did not have their own expertise and capacity to necessarily sustain in the long run. The Embassy expected the SDA to assist with improving their own skills to work with gender and poverty issues and not to work as a “consultant” to interventions.

Project and programme staff based in Kimberley report that Embassy officers do “remind” them about gender and do inquire what is happening but that this does not take the hands-on approach of the SDA who had something practical to offer. When the programme of co-operation with Statistics SA was getting underway, the Embassy had discussions with Statistics Sweden TA about how to support gender equality in such a way as to complement the Norwegian input, which was directed specifically at supporting the Gender Unit at StatsSA.

The annual sector reviews offer an opportunity for monitoring gender equality work. However, this is also an area in which the minutes (travel reports) do not reflect the dialogue, which depending on those who participated from Sida, was often substantial. Intervention partners told the evaluation team that informal occasions for dialogue on gender equality were also important, such as when travelling to visit intervention sites.

Another way that the Embassy can dialogue with its partners is by commissioning an evaluation and discussing the findings with key stakeholders. Two of the interventions studied had been evaluated. One, of Statistics SA²⁵,

²⁵ *The Institutional Development of Statistics South Africa – A Baseline Study using the Staircase Model*, by Peter Winai et.al., 2000-04-05

makes no mention of gender equality, apart from the racial and gender composition of staff. The other²⁶ is a gender review, commissioned by the SDA.

Given the heavy responsibilities of Embassy staff that make field visits infrequent, it is important that gender equality is integrated into items on the agenda for sector reviews and that discussions are adequately minuted.

3.2.3 Dialogue with Civil Society

In its support to civil society in South Africa Sida funds a large number of non-governmental organisations (NGOs) and other civil society organs such as networks. Support is concentrated in the same sectors outlined in the Country Strategy. Under democratic governance, therefore, organisations working in the areas of gender equality, human rights, conflict resolution and popular participation are funded. It is a great deal of work for an understaffed Embassy to monitor a large number of funded organisations. When the SDA post was filled, according to the representative of one organisation receiving funds, quarterly discussions with the Embassy included dialogue on highly specific gender equality issues, in addition to routine monitoring of targets, outputs and budgets.

Before 2000, the Annual and Semi-Annual Consultations included, in addition to government-to-government discussions, an NGO session in which representatives from civil society participated. In 2000, the NGO session was terminated, and representatives from NGOs and networks were invited to attend the Annual Consultations. The evaluation team unfortunately did not have the opportunity to discuss their participation with an adequate sample of civil society representatives. Two representatives told the evaluation team, however, that if they are having problems in implementation with activities that Sida has funded, they feel constrained to engage in dialogue with Sida on gender equality issues generally. In any case, only Finance Department has the authority to represent government on issues concerning the co-operation Agreement with Sweden. It would seem, therefore, that an additional forum for dialogue with civil society would be useful – but this has implications, perhaps not resolvable at present, of available human resources and time.

In summary, there is reinforcement of Sida's and South Africa's mutual goal of supporting progress towards gender equality in government-to-government dialogue, and the new thematic approach to Annual Consultations provides scope for mainstreaming dialogue on gender equality *into* discussions on other specific themes and sectors. It is important that this be minuted. There was significant and detailed dialogue in the past with specific intervention partners, and this dialogue also needs to be better minuted in sector review (travel) reports. The extensive dialogue with civil society organisations appears to

²⁶ "Gender Review of the Sida-supported Urban Development Programme in Kimberley," by Josette Cole and Sue Parnell, July 1999

have decreased since the posts of SDA and her local successor were terminated. However, other opportunities such as inviting civil society representatives to Annual Consultations, are now being taken.

Analysis

To be an effective mechanism in development co-operation, dialogue needs to become highly explicit about gender equality in specific thematic areas and sectors, since there is complete agreement between South Africa and Sweden on the general goal. Dialogue between Sida and its South African partners can address such issues as the links between gender equality and poverty reduction with respect to access to resources and services, and to knowledge and rights. Dialogue on the relation of gender equality to macro-economic policies, financial and budgeting programmes, economic co-operation and the private sector is particularly critical, given that these areas will become increasingly important. In addition to taking opportunities to widen, but also deepen, the discussion on gender equality, it is also important that discussions on formal occasions are minuted so that there is a point of departure that can be referred back to and progress documented.

A key representative from Department of Finance, whom the evaluation team met, was of the view that key issues derived from the Country Strategy could be used as a point of departure at each Consultation, in order to monitor progress towards supporting gender equality in all bilateral development co-operation priority areas. If agreed to by the Swedish side, he believes that government would be willing to include national poverty and gender experts from government at Annual Consultations. This would assist to make the dialogue at formal discussions more concrete. Recognising the constraints on Embassy officers which limit the time they have available to make field visits, part from regular sector reviews and quarterly programme meetings, and to visit the offices of civil society organisations, it is important that the opportunities for formal dialogue are used as concretely and as productively as possible, and are also minuted.

Chapter 4

Mainstreaming Gender Equality – Four Interventions in South Africa

This chapter, and the three that follow, cover four important dimensions of working with gender equality in selected interventions in the South African country programme. The dimensions that will be discussed in detail include:

- mainstreaming gender equality;
- poverty reduction and gender equality;
- stakeholder participation; and
- local meanings of concepts and changes in gender equality.

These chapters are organised around these dimensions in order to bring out key issues in the evaluation Terms of Reference, rather than by intervention. Nonetheless, it is important to have an overview of the four interventions as a context for the discussion that follows.

4.1 Summary of the Four Interventions

The South African Country Strategy stated that development co-operation would emphasise the transfer of skills and knowledge in order to build capacity and to develop competence. Therefore, three interventions focus on capacity building and institutional development. One intervention, TPL, is a more traditional type of project in which resources, rather than skills, were transferred.

StatsSA has its headquarters in Pretoria, and the evaluation team worked there as well as in one provincial statistical office in Kimberley – the capital of Northern Cape Province. LGDSP was a provincial programme, also based in Kimberley but with activities taking place in towns throughout this biggest, and least populated, of South Africa's provinces. The two urban development programmes, CUP and TPL, were specific to Kimberley municipality.

Statistics South Africa – Statistics Sweden Technical Assistance Programme:

StatsSA brings together two sister statistical bureaux. Since 1996, personnel from StatsSA have visited Sweden, and a great many long- and short-term

consultants from Statistics Sweden have worked with their partners in South Africa. The long-term objective of the co-operation has been to develop “an efficient statistical organisation able to produce relevant, reliable, objective and timely statistics and able to meet changing needs of statistics in the areas of co-operation.” The first phase of the programme (1996–1998) included cooperative work on the 1996 Census, development of demographic and socio-demographic statistics in surveys, support to the development of provincial offices and training. The second phase (1999–2003) has focused more on strengthening the institutional infrastructure through strategic planning and management and administrative support systems, in addition to specific work on bodies of statistical data. The evaluation team was told by key informants from Sida and by consultants interviewed that the programme was considered very straightforward because of the long experience of the two cooperating institutions. Statistics Sweden has extensive experience in cooperating with statistical bureaux elsewhere, and StatsSA has its own long history and experience, albeit mostly in the context of *apartheid*. The technical assistance aimed among other things, therefore, to increase statistical knowledge about South Africans who had been invisible in the past.

Local Government Development Support Programme:

LGDSP has completed one phase (July 1997–December 2000), and a second phase was approved during the evaluation period. The overall aim of Phase 1 was “to support the Department of Housing and Local Government in its efforts to assist the municipalities to improve their service delivery capacity, based on the needs of the people.” The Swedish Association of Local Authorities and the Swedish Institute for Public Administration, in co-operation with the provincial department, implemented LGDSP. In order to build the capacity of elected councillors and employed officials in municipalities, LGDSP created municipal task teams in seven towns or clusters of small towns throughout the province, each of which took up one theme (such as financial management or human resources development) to improve their delivery of services to local residents. In addition, two provincial task teams provided backstopping on cross-cutting themes to the seven municipal task teams. Given the size and complexity of this programme, the evaluation team focused its efforts on one provincial task team, Gender, Poverty and Children’s Issues, and on four municipal task teams, those that worked on gender mainstreaming, poverty and job creation, children’s issues and water and sanitation.

Comprehensive Urban Plan:

CUP was a planning project to give “support to planning procedures and introduction of new planning components and aspects” at Kimberley City Council (KCC). It was implemented by a Swedish consultancy firm, Hifab International, together with councillors and officials at KCC. During the eighteen months of the project, from June 1997–December 1998, there were many short-term consultants at KCC preparing reports on such topics as

land use management, housing, urban agriculture, environment, bicycle lanes and human resources. The major output of CUP was the plan itself,²⁷ supplemented by a few specific supportive and some follow-up projects. Although CUP was of short duration, KCC is now implementing or planning to implement major recommendations in the Plan within the context of government's policy and legislation on integrated urban planning.

Trees, Paving and Lighting Project:

TPL was implemented by KCC between July 1997 and March 1999 and was related to CUP. The latter did not produce visible, tangible results in a city that – like all South African cities – had been “disintegrated” during the long years of separate development and where the majority of citizens received inadequate municipal services. TPL was therefore conceived as a “fast track project” in parallel with CUP “to demonstrate visibly, in the short term, results of the co-operation agreement between the Governments of Sweden and the Republic of South Africa.” “Fast track” meant that quickly delivered improvements to the urban environment would demonstrate to residents in disadvantaged city suburbs that their Council had will and capacity to improve the outward appearance of their neighbourhoods. The components of TPL therefore included planting trees along public walkways, paving sidewalks and frequently travelled streets, putting in storm drains and providing security lighting.

It is important to note that three interventions were directed at institution strengthening and capacity building and did not have primary stakeholders as direct beneficiaries. In the case of *StatsSA*, the activities undertaken were to improve statistical coverage of the majority of South Africa's citizens who had been invisible in the *apartheid* era. The resulting statistical products would serve, *inter alia*, to provide government with a sounder basis for policy making and development planning. *LGDSP* and *CUP* directly targeted servants of the people – municipal councillors and officials – although residents of municipalities were expected to participate and benefit. Only *TPL* directly targeted ordinary urban residents, either as workers or as beneficiaries of the improvements that the project delivered.

In this chapter we will examine mainstreaming in the four interventions, including gender equality goals and other processes and components of mainstreaming – strategies, gender analysis, the roles and responsibilities of key actors, ownership, institutional capacity and resources, and building capacity.

4.2 Gender Equality Goals

This section examines the gender equality goals as stated in the project/programme designs, or in the Logical Framework Analyses, of the four interventions. It analyses how the goals were introduced and examines the issue of ownership of gender equality.

²⁷ *Caring for our Future – Comprehensive Urban Plan*, City of Kimberley, November 1998.

Sida's *Action Programme* states that interventions should be explicit regarding equality goals:

The links between the sector goals and equality must be clarified and explicitly stated in project and programme objectives.²⁸

Without a clear link between sectoral and gender equality goals, mainstreaming becomes more problematic in that there may not be activities directed to improving unequal gender relations, no targets and therefore no monitoring of equality effects and changes. As noted in section 1.2.2 the evaluation team also felt that simple women's participation targets can not be seen as gender equality goals unless there are additional efforts to address inequalities.

Sida's Action Programme was published in April 1997, approximately one year after the programme at StatsSA began and nearly simultaneously with the start-up of the other three interventions. Nonetheless, there had been considerable work at Sida immediately prior to the introduction of the *Programme*, and the Swedish Parliament had passed the gender equality goal in May 1996. Therefore, one could reasonably expect that some attention would have been paid to integrating this goal in the design of new interventions.

Findings

Three of the four interventions have some form of gender equality goal in their design, and the fourth has a goal on women. The formal statements of goals, extracted from project documents, are presented in the following table.

²⁸ *Action Programme*, p. 11

Table 1: Statements of gender equality and other goals, by intervention	
Intervention	Gender Equality Goals
StatsSA	within the context of the long-term objective of general infrastructure strengthening: [making] women visible in statistics by: <ul style="list-style-type: none"> – developing a framework for compilation and presentation of gender issues, and – gender-sensitising all relevant statistics
LGDSP – overall	under programme approach and philosophy, “issues related to equality, gender and diversity management must be integrated into the entire development programme”
– Gender, Poverty & Children’s Task Team (provincial level)	“to assist the municipal task teams in addressing the severe problems of poverty, gender and disability inequality that exists in the Northern Cape”
– Gender Mainstreaming Task Team (municipal level)	“to mainstream a gender perspective in Kimberley City Council as a service provider and employer to ensure a more efficient service and equitable environment”
CUP – project design	“present planning procedures and introduction of new planning components and aspects, in particular related to integration, public participation, gender, Agenda 21, environment, housing, local economic development and transport”
– <i>Caring for our Future</i> (the Plan) to support	under one of the social challenges to integrated urban planning, the challenge of gender equity is “to ensure that [it] is applied in all spheres of urban development and not as an add-on activity at the end of the process”
TPL	to “involve women optimally” by “30% female attendance at all meetings, etc.”

As is evident in the above table, the design of StatsSA and LGDSP included rather explicit goals linking equality to some degree with the specific sector. The CUP design was less explicit in mentioning “gender” as one aspect to be included. TPL had a women’s participation target referring to meetings but not explicitly to participation in community-based activities.

Analysis

In order to better understand the goals, and the differences among them, the South African team looked at how the goals had come to be included in project or programme design and to what degree the partner organisation expressed a sense of ownership of gender equality goals.

In three interventions, commitment to inclusion of some form of gender equality or women’s participation goal in the programme design came from Sida, either from Stockholm, from the Embassy or from both: StatsSA, LGDSP and TPL. In the case of CUP, the initiative to address gender originated with the consultancy firm. The SDA at the Embassy played an important role in supporting gender equality goals at the inception of three interventions. She was a member of the appraisal mission for LGDSP and co-organised training on gender issues in urban development for KCC staff and civic organisations in order to support the implementation of the goals in CUP and TPL.

The Swedish pre-appraisal mission to prepare the technical co-operation programme between *Statistics South Africa* and Statistics Sweden referred to the importance of gender-relevant statistics by referring to the 1995 Beijing Platform for Action. It mentioned the importance of gender-disaggregated data and of qualitative and quantitative statistical indicators to assess economic performance from a gender perspective. The justification for gender-relevant statistics is that women's work and their contribution to the national economy should be made visible and that women's unremunerated work in relation to their vulnerability to poverty should be documented. Thus, the programme design, among its numerous objectives, clearly stated the need to develop a framework for the compilation of gender statistics and identification of gender issues, with a gender perspective included in "all traditional statistical fields." The gender equality goals in the Stats SA programme derive from a clear and well-argued rationale.

StatsSA was committed to gender equality and thus ownership, or imposition of gender equality by the Swedish stakeholders, is not an issue. Because many sections of the population had not been included in statistics in *apartheid* South Africa, StatsSA placed a high priority on documenting the poor quality of life and the impoverishment of black women and men in the former "homelands," on white-owned farms and in other sectors of the economy such as the informal sector. At the time that the programme with Sweden was developed, Statistics Norway had already signed an agreement to support StatsSA to undertake a time-use survey on unremunerated domestic work and poorly documented work in the informal sector and to create a Gender Unit as an institutional base for the survey and other gender-relevant statistics. Support from Statistics Sweden was seen as complementary to the Norwegian support.

The situation was, however, different in the conservative environment of the Northern Cape. Key informants told the evaluation team that gender equality and women's empowerment were unfamiliar and – many said – threatening concepts, despite the Constitutional provisions and other undertakings by the democratic South Africa government. In this context, it was necessary for Sida to be pro-active in pushing for the inclusion of gender equality goals in new projects and programmes.

LGDSP grew out of a request by the Northern Cape Provincial government for Swedish assistance to support local government development. A Swedish consultant made the initial programme design. When a Swedish appraisal team visited the province, they added gender equality mainstreaming as one area of focus. This was included in the TORs of the consultants/project implementers who subsequently used programme funds to employ a project assistant to head the provincial task team on Gender, Poverty and Children's Issues and to ensure that gender issues were mainstreamed throughout the entire programme. Thus, the gender equality goals in *LGDSP* were explicit, but the issue of ownership was more problematic than it was with StatsSA.

The Country Strategy for South Africa was not published until two years after most interventions had started. Nonetheless, it is worth noting that the greater clarity of the gender equality goals in StatsSA and LGDSP are also reflected in the emphasis given to these goals in this sector in the Country Strategy. However, the two urban development projects had already been completed when the Country Strategy period began.

Sida's pre-appraisal of *CUP* was based on discussions with KCC, the provincial government and NGOs and included, *inter alia*, a gender perspective in urban development planning. However, as Sida headquarters further developed the project design, gender equality goals were not included. When Sida tendered for technical assistance, the successful consultancy firm suggested that a gender perspective should be included and the Embassy was active in endorsing this. A one-month consultancy on how to implement the goal took place at the beginning of the project. In her final report the consultant noted that a one-month input was "too short to secure the gender perspective in this project of in all close to 100 women/men-months of planning activities,"²⁹ and said that follow up actions were needed if a gender perspective was to become anything more than an add-on to the entire project.

It is important to acknowledge that "gender" *was* included as a new planning aspect in the CUP process and that gender "equity" is analysed in the resulting plan as one of the challenges to be addressed in the future. However, in a highly technical planning project, lodged in a city council with no prior experience of working with gender issues and a fair amount of resistance to the idea, the inclusion of a gender perspective was not based on a sense of ownership on the part of the local partner, at least not in the beginning. Some project implementers told the evaluation team that they thought the goal existed largely on paper.

TPL originated as a proposal from KCC, to which the Embassy took a proactive position that a broader gender perspective than women's participation be included. This broader perspective was not included through amending the project proposal, leaving the women's participation target as the relevant objective. One KCC official remembered, when speaking with the evaluation team, that "the only thing I knew about gender in the TPL [at the beginning] was that Sida stipulated that a certain percentage (30%) of workers on the project should be women." This may, of course, not have been an accurate reflection of the message that Sida was trying to convey. Thus, the relationship between activities in *TPL*, such as employment generation, and the potential to address unequal gender relations do not appear to have been particularly clear to implementers in the partner organisation at the beginning.

StatsSA is the only intervention in which the goals are based on an analysis and rationale. The gender equality goals in LGDSP, although clear and explicit, are not linked to analysis of women's limited participation in political decision-making or to enabling their empowerment. The evaluation team

²⁹ Urban Planning and Environmental Projects in Kimberley and Port Elizabeth; Gender Issues – Final Report, by Anita Larsson, 1997.11.17

was told that these links were deliberately ignored because such concepts as women's empowerment would be too provocative in the conservative Northern Cape environment.

In summary, the interventions studied in South Africa exhibited considerable variation with regard to the nature of their goals in programme design. StatsSA had a clear gender equality goal based on analysis of the importance of gender-relevant statistics. LGDSP also had clear and explicit goals that were not as clearly related to the way in which gender equality would contribute to achievement of sectoral goals. The CUP design included a "gender" aspect among several others, and TPL aimed at a specified level of women's participation. Sida or Swedish consultants took a pro-active role to include some form of gender equality or other goal in the interventions in the Northern Cape, where lack of experience and resistance made commitment to (ownership of) gender equality problematic in the beginning.

Conclusion

The presence of clear, explicit gender equality goals in an intervention is important because they enhance the possibility that activities will have an impact on unequal relations between women and men. In retrospect (and recognising the time lag between the design of the South African interventions and the publication of Sida's *Action Programme*), clearer goals in CUP and TPL could have facilitated analysis of the way in which delivery of services by KCC could take account of women's and men's, boys' and girls' differing needs and priorities.

The absence of explicit goals contributes to a situation in which monitoring, evaluation and other learning and accountability tools are not used to address whatever gender equality contributions the intervention may make. As a result, the intervention may miss opportunities, which arise over its life cycle, to make alterations in programme design so that gender equality impacts and effects are increased. The evaluation team does not contend that gender equality goals over-ride other priorities, such as poverty reduction. Rather that a Sida-supported intervention should recognise where, if and how a contribution to gender equality can and should be a goal in combination with and linked to Sida's other cross-cutting goals and to sector-specific goals.

In a conservative environment such as the Northern Cape, Sida or Swedish partners clearly tried to be pro-active to ensure that interventions included some type of gender goal. Since partner organisations are the "owners" of interventions, this raises the question of what Sida has the obligation to do, and how far it should go. The South African government does not have a problem with ownership since its own gender equality goals are strong. Therefore, a lesson to be learned from the Northern Cape experience is that when Sida works with programme designs originating from institutional partners, it is important to discuss the implications of South Africa's national and international commitments for a specific programme. Justifying gender equality objectives in the StatsSA programme was linked to the Beijing *Plat-*

form for Action, for example, to which South Africa was a signatory. Dialogue on the specific links between sectoral and equality goals, and examination of whether a gender equality goal will improve the intervention and the lives of those affected by the intervention, is therefore critical.

If gender equality goals are clearly stated in project and programme design, it is easier to work with them during implementation of intervention activities. On the other hand, if there is no gender equality goal in intervention design, it is still possible to work within implementation processes to raise awareness and to begin to address gender equality issues. In the following section, we will examine the extent to which mainstreaming of gender equality took place in the four interventions.

4.3 Mainstreaming Components and Processes in the Interventions

Mainstreaming of gender equality is a complex process to which specific components contribute: a strategy for mainstreaming, gender analysis, presence of supporting and supportive structures, roles and responsibilities of key actors, ownership, institutional capacity and resources, and building of capacity.

In the following sub-sections, we will look at findings for each of the four interventions separately, identifying measures taken to work with mainstreaming. In the subsequent analysis, the above-mentioned components of mainstreaming will be examined to assess the degree of progress made in the interventions studied, weaknesses and potentials.

Findings

4.3.1 Gender Mainstreaming at Statistics SA

Gender mainstreaming in the context of an institution that produces statistical outputs would refer to whether a gender perspective, based on prior analysis of relevant gender inequalities such as access to and control over resources, informed statistical work and was integrated into institutional processes and statistical products.

The terminology used at StatsSA complicates the discussion of whether a gender perspective is mainstreamed into statistics production. Sex as a stratifier of statistical data, that is data stratified by women and men or by girls and boys, is a normal statistical procedure. At StatsSA, such sex-disaggregated statistics are referred to as “gender statistics.” Thus, in responding to the evaluation team’s questions about whether or not a gender perspective informed their work, officials – both South Africans and Swedes – said, “Yes, of course, this is normal and can be taken for granted.”³⁰

³⁰ In an amendment to the Statistics Act of 1999, all official statistics “must be sensitive to distribution by gender, disability, region and similar socio-economic features.” Debbie Budlender, submission for the publication *World’s Women 2000*

The second, and most common, explanation received to the team's inquiries about a gender perspective at StatsSA concerned the institution's gender sensitivity as reflected in its recruitment and career advancement policies and practices. StatsSA has an affirmative action policy to recruit and to advance through the system persons from previously disadvantaged groups. These are black persons, women (of all races) and disabled persons. The current process of transforming the institution's staffing profile to make it more representative of South African society at large has therefore included affirmative action hiring. Key informants told the evaluation team that racial representativity is currently (but not explicitly) a more important goal for the institution than sex representativity.³¹ One woman commented that she appreciated that women are given affirmative action support but felt that her working environment is not yet sufficiently gender sensitive: "Men here at StatsSA think that women are born with typing skills."

Supporting StatsSA's institutional development through better representativity of staff, by race and sex, was one activity (of many) in the programme of co-operation between South Africa and Sweden. Over time it has been taken to be the main focus of working with gender issues in the co-operation programme.

The Gender Unit at StatsSA is responsible for improving gender-relevant statistics. However, officers in the small Unit told the evaluation team that they had not chosen to carry out an institution-wide "campaign" on gender-relevant statistics because they viewed this as counter-productive in what was, at the time, a white male dominated institution. Rather, in addition to launching a time-use survey, they took advantage of their presence in working groups on the census and on specific surveys to advocate for the inclusion of specific questions that would document the respective positions of women and men more accurately. This way of working – by pragmatically taking advantage of windows of opportunity – was a type of mainstreaming that was not very visible within the institution as a whole. It has, however, produced some important concrete results (see section 7.2).

Sida was very active at the beginning of the co-operation programme in dialogue with StatsSA on ways to support the Gender Unit. However, because of an existing agreement between StatsSA and Statistics Norway, this planned component did not take place.

Agreed upon components of the programme of co-operation with Statistics Sweden have not included explicit gender mainstreaming aspects even though a programme objective ("to gender sensitise all relevant statistics"³²) would appear to refer to mainstreaming. Statistics Sweden has an international reputation for promoting gender relevant statistics, but the original intention that the expert on this would contribute to the intervention did not

³¹ The Employment Equity Act of 1998 sets targets for recruitment of black persons and women of all races and obliges employers to report on progress annually.

³² This objective is not further defined so it is difficult to know exactly what was meant.

take place. Swedish consultants whom the evaluation team met said that they had received gender training in their own institution. However, the technical areas in which they worked at StatsSA appeared, they said, to have little to do with gender equality mainstreaming – apart from affirmative action. Thus, opportunities to explicitly work with a gender perspective in such components of the intervention as training in statistical methods and developing a clientele of users were not taken advantage of. Sida commissioned a major institutional evaluation of StatsSA, which noted the impressive achievements in race and gender balance but did not address mainstreaming.

On the other hand, there is potential to develop opportunities to work with gender mainstreaming in the future. The evaluation team was told, during the final round-table discussions with StatsSA staff in Pretoria and Kimberley, that there is now more appreciation of the need for gender-relevant statistics and a willingness to work towards this. The quotations in the following box are examples of individual commitment.

- “Change has to start with ourselves. We may have the numbers – 50% women and 50% men, but we should now try to find out what is behind the numbers.”
– StatsSA male officer, Kimberley
- “Change has to start with men, by asking what men here at StatsSA must do to ensure that the Gender Unit has more impact.” – StatsSA male officer, Pretoria

In summary, gender equality mainstreaming within the Swedish programme of co-operation at StatsSA has concentrated on supporting affirmative action to increase the representation of black persons and women within the institution. These issues of equality within the organisation are important. At the same time, there has been no explicit effort to work

with mainstreaming in some relevant components where Swedish TA has played an important role. The small Gender Unit in StatsSA has been working to improve the gender-relevant statistics captured by surveys, there are indications that recognition of the importance of these statistics is increasing within the institution.

4.3.2 Gender Mainstreaming in LGDSP

LGDSP – Phase 1, in addition to its explicit gender equality goals, also had an intervention structure conducive to mainstreaming of gender equality and other cross-cutting themes such as poverty reduction. The programme structure, comprised of provincial and municipal task teams, facilitated mainstreaming in two directions:

- vertically, from provincial to municipal and community levels, and
- horizontally, across the different themes, each of which was the responsibility of a municipal-based task team.

The provincial Department of Housing and Local Government, the partner in which the intervention was based, had a gender focal point, but the De-

partment was not working on mainstreaming, apart from the issue of internal gender balance. Externally hired consultants, both Swedish and national, managed the intervention. The Embassy, including the SDA was very active in supporting the programme and department management to work towards gender equality mainstreaming.

The provincial-level Gender, Poverty and Children's Issues Task Team (GPC TT) was responsible for gender mainstreaming in the entire programme. It carried out its responsibility in the following ways:

- by organising a few general gender training and specialised (e.g. gender budgeting) workshops for members of municipal task teams;
- by visiting municipal task teams to discuss their work and making suggestions on gender mainstreaming; and
- by providing resources, such as documents, and links to relevant gender-based organisations and NGOs.

The evaluation team appreciated that introducing gender equality mainstreaming into programme objectives and structure was a courageous and ambitious step, given the sensitivity about and frequent opposition to this issue in the conservative environment of Northern Cape Province. At the time the first phase began, white men, primarily Afrikaners, dominated municipal councils.

The programme developed a gender equality mainstreaming strategy suitable to the local environment, and programme management deliberately chose the least threatening approach. This approach focused on building gender awareness, i.e. that women had a right to participate, and on working towards gender balance, i.e. ensuring that women were adequately represented on municipal task teams and in their community-based activities. Task teams were taught to ask three questions: who plans, who decides and who utilises? One task team leader told the evaluation team what this approach meant to her (see adjacent box). A male task team leader spoke about men's reaction to the idea of gender balance: "at times we did not take the women seriously in the team. We thought this gender question is only women trying to take over."

"If no equal balance is reached in terms of numbers of women and men participating in this process, then not everybody's input has been taken into account and therefore fairness has not been achieved."

– female task team leader, LGDSP

The Gender Mainstreaming Task Team at KCC, one of seven municipal teams, provides an explicit example of how this approach was implemented. Supported by a committed female mayor, the Task Team set out to increase female representation on Standing Committees of the Council, to increase the number of female municipal employees, to ensure that women as well as men received training opportunities and so on. In general, the Task Team concentrated on internal institutional and organisational issues. Although

the Task Team had also planned to address gender inequalities in the service delivery responsibilities of KCC, their initial (and only) effort – a survey of the Parks Department – didn't bring the concrete and positive results that they had originally intended.

One component of the mainstreaming strategy was gender training, especially important because most secondary stakeholders were unfamiliar with gender equality issues and because of anticipated resistance. The programme therefore provided several short gender sensitisation trainings for municipal officers and politicians and one more specialised introduction to gender budgeting. Recipients, whom the evaluation team met, said that their awareness of and interest in gender issues had been raised. Some also noted, however, that the training was carried out after they were already well into their work and felt that it came too late in a programme of only two and one-half years to make a difference, with little time to consolidate and follow-up through additional training. Sustainability was also an issue, after trained councillors were voted out of office.

Another component of LGDSP's mainstreaming strategy was to support some municipal task teams to carry out surveys to obtain baseline data on their thematic areas. The Children's Issues Task Team, for example, learned how to conduct a PRA and collected data themselves. The Poverty Alleviation and Job Creation Task Team hired consultants to administer a questionnaire on employment issues. The evaluation team noted that these studies had potential to be used for gender analysis. In both cases however, although sex-disaggregated data were collected, the researchers subsequently aggregated the results in the process of compiling them for presentation in reports. This made it less likely that task teams would have access to concrete data to analyse gender differentiated needs and priorities as a basis for working with gender equality issues in their activities.

Members of task teams were volunteers, with their own work responsibilities. Among the constraints that teams faced were lack of time, human resources, gender expertise and monitoring capacity to apply gender mainstreaming in their thematic topics. Some teams were far from Kimberley, and problems of distance, transport and communication limited interaction with programme management. The evaluation team noted, therefore, that Sida's support to the programme goal of gender equality mainstreaming in phase 1 was perhaps not realistic, given the time and other constraints faced.

There were, however, efforts made to work with the mainstreaming strategy, with support and advice from the GPC TT. For example, the Water and Sanitation Task Team requested assistance on how to best support women's safe access to conveniently situated water sources in their communities. Such embryonic efforts to mainstream appeared to the evaluation team to be somewhat *ad hoc*, rather than systematically applied as part of the programme's mainstreaming approach.

The environment – often within a team itself as well as in councils and communities – was conservative, with men expressing resistance to gender balance. Women task team members were expected to “speak for” women and were criticised by men in some teams for “not understanding properly.” Women team members, on the other hand, reported to the evaluation team that they were often marginalised. One woman gave the example that she was expected to leave team meetings to prepare refreshments and was then criticised by the men because she hadn’t contributed. The evaluation team was told that, notwithstanding conservatism and resistance, some individual male actors in the programme became active supporters of gender balance.

Thus, in this intervention, the concept of gender equality mainstreaming was interpreted primarily as gender balance. The duration of Phase 1 was perhaps too short to enable the key stakeholders to expand the concept of mainstreaming to include systematic work on gender inequalities, related to racial and socio-economic inequalities, that have effects on women’s and men’s ability to secure their livelihoods, their access to services and resources, their knowledge of their rights, etc. In NCP a discussion on male roles had not yet begun, apart from initiatives to reduce gender-based violence, and the programme did not address men’s roles as supporters of gender equality, apart from gender balance.

The third question in the strategy – who utilises? – required teams to analyse gender relations, and gender inequalities, relevant to their respective themes. However, this was a new and unfamiliar aspect of mainstreaming, in spite of training. Said a member of the municipal Children’s Issues Task Team: “we did not work with gender equality as there was a specific task team for this issue.” Said another: “we focused on children; gender was not an issue.”

The main output of the first phase of LGDSP was a series of Training Manuals, developed on the basis of task team experiences as reflected in their final reports. The manuals are user-friendly, simple to understand and will be used by municipalities in the Programme’s second phase. There are separate manuals on the main themes in LGDSP such as Water and Sanitation. The GPC TT produced three manuals, one each on Gender Mainstreaming, on Poverty Alleviation and on Children’s Issues. Production of these manuals that are specific to the Northern Cape context is a big achievement.

The fact that LGDSP’s gender mainstreaming strategy resulted largely in work on gender balance, with only incipient attention to work to address gender inequalities in the various themes of the municipal task teams led to missed opportunities in the content of the manuals. Mainstreaming of a gender equality perspective is not tackled in the Water and Sanitation manual. Gender issues are scarcely mentioned, and gender mainstreaming not addressed, in the Poverty Alleviation and Children’s Issues Manuals, even though the same team responsible for the Gender Mainstreaming manual also produced these.

The evaluation team appreciates that two and one-half years was a short period in which to implement an ambitious programme of gender mainstream-

ing in LGDSP. Some task team members told the evaluation team that they now realise they had overlooked important opportunities. A woman member of the Poverty Alleviation Task Team commented, for example, that they should have thought of gender when proposing their activities – by creating jobs in the agriculture sector where women already worked rather than in mining where men worked.

The evaluation team noted that there are opportunities to strengthen gender equality mainstreaming as the programme enters its second phase. In particular, the simple explanations and drawings in the Gender Mainstreaming Manual provide a good basis for integrating a gender equality mainstreaming perspective into the other thematic manuals. At the final round-up session on LGDSP, participants told the evaluation team that manual revision should be a top priority.

In summary, LGDSP had an effective intervention structure within which to work with other components of gender equality mainstreaming. The mainstreaming strategy focused on gender balance, rather than on analysis of gender inequalities in community-based target groups. Some efforts to address inequalities through improving municipal services were initiated, though in a limited way. Gender training increased awareness of gender equality issues, and community-based surveys opened up the possibility for working with sex-disaggregated data and with more specific gender analysis in the future. The hands-on approach of the Gender Mainstreaming Manual, based mostly on the local context, provides the opportunity for integration of a broader approach to gender equality mainstreaming in other thematic manuals in phase 2.

4.3.3 Gender Mainstreaming in CUP

Gender equality concepts and mainstreaming were introduced to the urban planning staff at KCC by Swedes – by a short-term consultant at the beginning of the process and by the technical consultants generally, with support from the SDA and programme officer at the Embassy. In spite of a male-dominated and technical working environment in KCC's planning department, the consultants found the atmosphere conducive to introducing concepts of gender-relevant planning. Confirming this, local staff told the evaluation team that, “in South Africa we have very strong women.” And, “empowerment of women is a [national] goal. Gender equality is there, it is a goal that can no longer be questioned.”

On the one hand, gender mainstreaming might be seen as having had little KCC ownership in the beginning. “Gender issues were something that was dealt with by the Swedish,” one male planner told the evaluation team. However, a Gender and the City training workshop took place a half-year after implementation began. Some technical staff who participated in the workshop told the evaluation team that they had acquired more understanding of how gender inequalities are related to specific areas of urban planning, in addition to the

need to promote women's participation. The way in which one planner expressed it is given in the above box.

The evaluation team felt that CUP had an implicit approach to addressing gender equality issues rather than a more explicit strategy as was the case with LGDSP. This implicit approach did bring results – as in informing and consulting with women and men community members in large meetings during a Public Participation Process. A Gender Review commissioned by Sida confirmed that the PPP was gender sensitive in that project management briefed facilitators of meetings to include gender issues and that women's voices were definitely heard. The Review also identified some of the constraints to gender equality mainstreaming in CUP:³³

- gender equality objectives and targets had not been clearly defined, hence there was no monitoring;
- although mainstreaming was everyone's responsibility, in practice one KCC staff member kept the issue on the agenda;
- there were too many new ideas to be internalised in urban planning, of which gender was only one;
- integration of gender mainstreaming into PPP was somewhat *ad hoc*, rather than systematic; and
- no funds were allocated to gender mainstreaming, which influenced for example the lack of coverage of gender in the Transport Study.

The amount of work that was invested in raising awareness of gender equality issues, and in trying to work with gender mainstreaming by some local KCC officers, is not fully reflected in the main output of CUP: *Caring for our Future – Comprehensive Urban Plan*. The Plan recognises that “since this [gender equality] is a relatively new concept, much more remains to be done in this regard.”³⁴ This is an important acknowledgement, on which to build in the future. The section of the Plan on “gender perspective” introduces gender concepts and is taken, although not acknowledged, *verbatim* from the inside cover of *Sida's Action Programme*. The stated intention of applying a gender perspective is evident in a few sections of the Plan such as the significance of housing and security to women and children. Although women and men had expressed different needs, as for the timing and location of public transport during PPP, such gender-differentiated needs were not made visible in the Plan.

“Whenever you plan you must go back and see whether you have taken into consideration that women may have different needs than men. We were already aware that women should be promoted to take positions at par with men, but this focus on differences in needs is a lesson which was new to most of us.”

– urban male planner, KCC

³³ “Gender Review of the Sida-supported Urban Development Programme in Kimberly, by Josette Cole and Sue Parnell, July 1999, pp. 5–11

³⁴ *Caring for Our Future – Comprehensive Urban Plan*, Kimberley, Nov. 1998, p 14

In learning from CUP's experiences, the evaluation team noted the awareness of some KCC staff, of South Africa's gender equality and women's empowerment policies and goals. Such awareness provides an entry point for working with gender equality mainstreaming in urban planning sectors, in contrast to the LGDSP strategy, which was more tailored to the conservative local environment. There is potential to explore this entry point in other urban development programmes in South Africa, as well as to consider ways of addressing the constraints identified by the Gender Review.

In summary, CUP received support for gender equality mainstreaming from the Embassy and from the TA, which managed the intervention. Work with gender equality issues was framed within an implicit approach to mainstreaming, rather than an explicit strategy. During the consultative and information-sharing Public Participation Process, substantive efforts were made to be gender sensitive and to hear women's as well as men's views. However, the efforts invested are not fully reflected in the main output of the intervention, the comprehensive Plan.

4.3.4 Gender Mainstreaming in TPL

When KCC began to implement TPL, the Embassy requested that more attention be paid to gender equality issues, in addition to the proposed women's participation target. Sida also assisted to facilitate this through a gender and LEA workshop, which included identification of mechanisms to address gender (and other such as environment) issues. Some of those involved told the evaluation team that because the project had been pre-designed, the gender training came somewhat late (one-half year into implementation) to have the desired effect and was not followed up. Others felt that working with gender mainstreaming was difficult in fast-track projects that had to be completed in a short period.

Nonetheless, as with CUP, the evaluation team found that some key stakeholders (KCC officers, councillors, community leaders) had become more familiar with working with gender issues as a result of the training and with addressing these issues during implementation. In particular, they spoke with the evaluation team about women's representation and participation in the Steering Committee (30%), in community liaison work and in their recruitment in the labour intensive project components.

It is common in South Africa to stipulate a target of a minimal 30 per cent female representation or participation, and this was the target that TPL aimed for and largely achieved in the labour intensive project components. The large project Steering Committee of thirty persons also had a 30 per cent target for the representation of women from the community. One key informant told the evaluation team that the targets for women in labour-intensive works would not have been met had it not been for the insistence of women Steering Committee members.

Women were targeted as workers for labour-intensive works, in particular the paving and tree planting components. The high mast lighting component, which was not labour intensive, employed no women. One key informant explained to the evaluation team that, “the lighting department did not want to employ women. They argued that the project was technical and women will not be able to do the job and will hold back progress to finish the project on time.” Mechanisms to increase women’s participation in the other project components – to counterbalance the resistance to including them in lighting – were apparently not considered.

The Gender Review³⁵ had the following relevant findings on TPL:

- it was very positively received by the community and helped to increase gender sensitivity among stakeholders;
- women were actively involved, e.g. in community liaison;
- although the Steering Committee requested community leaders and local politicians to work towards as much participation by women as possible, there were no mechanisms to enforce this;
- on the technical side (apart from participation), gender issues were implicit, rather than explicit; and
- in general there was a narrow interpretation of gender, focusing on women’s representation.

The Gender Review stated that, in retrospect, some KCC staff felt they could have amended the implementation of the project to take better account of broader issues, such as inequalities in access to work based not only on gender, but on race and class as well.

The KCC is self-critical about the gender, or women’s participation, aspect of the project. The Final Report on TPL states that, “the gender goals suggested for this project were not obtained largely due to entrenched attitudes . . . Gender seminars for the Community Development Forum representatives and possibly the beneficiary communities would have assisted in achieving these goals.”³⁶ However, the experience of working with gender issues in TPL has contributed to changed (and changing) attitudes at KCC. When an official was asked what he would have done differently in implementing TPL, he replied: “we would employ more women than men. Women on this project have proven that they are as good as men. Women put their wages to better use.”

In summary, TPL did not have an explicit gender equality mainstreaming strategy, but rather an implicit approach which translated into a rather narrow focus on women’s representation in project implementation mechanisms and in their participation in labour intensive works. At the same time, the project – together with other urban development, Sida-funded projects in

³⁵ Gender Review, op. cit., pp. 11–15

³⁶ Final Report – Trees, Paving & Lighting, n.d. c1999, p. 6

Kimberley being implemented simultaneously, contributed to heightened awareness of some gender issues.

4.4 Analysis of Gender Mainstreaming

The four South African interventions exhibited considerable variation in working with a gender mainstreaming strategy, when assessed on the six-point scale on gender mainstreaming developed for this evaluation (see section 1.2.3). LGDSP had an “institutionalised” level of gender mainstreaming (level 4). The programme design included gender equality objectives institutionalised in the intervention structure, even though there was a rather limited gender analysis as a basis for mainstreaming. CUP fell mid-way between levels 2 and 3, “pro forma” to “integrated.” Some incipient gender analysis was present, but there was no system for implementing mainstreaming. Stats SA was level 2, “pro forma,” because the limited mention of gender issues in the programme design had little impact on programme implementation – even though, outside of the co-operation with Sweden, other initiatives to promote mainstreaming were taking place. Finally, TPL was mid-way between levels 1 and 2, “zero” to “pro forma,” since the women’s participation target in the design also largely influenced the types of efforts that were made during implementation.

The mainstreaming scale was based on the evaluation team’s assumption that interventions would “move through” the logical progression of the project cycle, with some interventions making more progress than others. This proved not to be an accurate reflection of the reality that the evaluation team found on the ground. It is therefore instructive to examine the various components that are important in contributing to the complex process of mainstreaming, by looking across all four interventions.

Mainstreaming strategy:

LGDSP had an explicit mainstreaming strategy, even though the interpretation focused primarily on representation and gender balance issues. The other interventions had only implicit strategies (e.g. CUP), and one common finding was, therefore, that key mainstreaming elements that *did* appear in interventions were not brought together in a systematic way. It is perhaps too soon to have expected this, given the timing of the interventions in relation to Sida’s *Action Programme* and the fact that experience had not yet been acquired. The South African interventions offer instructive lessons, however, on the way in which explicit equality goals in intervention design are strengthened if they are linked to an overall strategy.

Gender Analysis:

Intervention activities become more precisely focused when they are based on sex-disaggregated and gender-relevant statistics that reveal gender ine-

qualities and the differing needs and priorities of women, men, girls and boys in the intervention area. However, this requires time, funding and some degree of gender expertise to frame issues relevantly. Initial efforts were made to work with analysis of gender issues in urban planning and to commission studies, as in LGDSP. This was a new area to most intervention stakeholders. Some recipients of gender training told the evaluation team that they would have appreciated training that dealt more specifically with analysis of gender issues in the sectors in which they worked.

The way in which stakeholders, such as implementers, understood gender issues and gender analysis was influenced by the locally constructed meanings of these and other relevant concepts. The concentration, in some of the interventions studied, on women's representation and participation, is related to one locally common understanding of gender equality – representativity – which will be discussed further in section 7.1.

The findings from the South African interventions indicate that *had* gender analyses been undertaken *and* findings integrated into implementation design, it is less likely that the major focus of some interventions would have remained only at the level of representation and participation issues. In the case of LGDSP, for example, utilisation of the information that had been collected could have made the activities to alleviate poverty and to address children's issues more gender-relevant. In the absence of such intervention specific data, an opportunity also existed in LGDSP to use existing national-level resource material on gender issues in democratisation, including the *Country Gender Profile* commissioned by Sida.³⁷ In the future, the *Gender in the City Guidelines*, which Sida is currently producing, will be a good source of guidance on how to make gender analyses in the technical areas of integrated urban development planning.

Mainstreaming structures:

A structure to support gender equality mainstreaming can be based in an intervention, in the partner institution, or both. LGDSP had a well thought-out intervention structure to promote mainstreaming, but it was not permanently institutionalised within the host department – and hence, in the long run, not sustainable. StatsSA, on the other hand, has a Gender Unit and thus the potential to make a long-term and lasting impact on mainstreaming gender equality. The mechanisms to promote mainstreaming at KCC were also intervention related and thus short term. Sida has the opportunity to dialogue with partners on the benefits to be gained from creating a permanent supportive structure for mainstreaming that will not be isolated or marginalised within the institution (such as is currently the case with a single gender focal point).

³⁷ *Gender in the City – Guidelines for Mainstreaming Gender in Urban Development Planning: A South African Experience*, draft, by Lotta Sylwander (Sida), n.d.

Role and Responsibilities of Key Actors:

Efforts to make progress towards gender equality through mainstreaming involve diverse stakeholders – Sida programme officers, implementing partners, consultants and others.

The initiation of interventions in South Africa benefited from the commitment of “gender advocates” at Sida, both at headquarters and in the Embassy, who had been actively involved in contributing to the *Action Programme* and working to include gender equality content in the CS. The evaluation team heard from partners that interventions had benefited most during the time that a specific position to work with gender equality existed at the Embassy. Although work to advance Sida’s development goals is the responsibility of all programme staff, the evaluation team is fully aware that time, pressure of work, competing demands and availability of resources may make this difficult. A system of incentives within Sida could assist to concretise responsibility for gender equality mainstreaming.

One issue that staff at headquarters emphasised to the evaluation team was the responsibility of TA and consultants. In the South African interventions the evaluation team found that the TA implementing CUP and LGDSP had assumed responsibility for working with gender equality mainstreaming, although they could have benefited from more, and more sustained, gender expertise. Other cases have shown, however, that good will or even a stated responsibility “to work with gender” are not sufficient. TORs and job descriptions that are explicit about responsibility for gender equality mainstreaming and are backed up by accountability mechanisms will support Sida’s efforts.

Ownership:

Ownership – commitment to and willingness to work towards gender equality – by partners is less of an issue in South Africa than it is in some other countries. Sida has not had to be highly pro-active because of the national government’s own commitment to this goal. StatsSA is an example of an institution that has taken initiatives to align its own practices to conform with national policy. KCC also expressed both political and administrative commitment to working towards gender equality (more specifically towards gender balance), at least during the period when the Sida-supported interventions were being implemented. In other cases, however, such as small municipal councils in the Northern Cape, bureaucratic resistance and the problem of lack of ownership was experienced. LGDSP took a cautious approach, therefore, and worked with a narrow, in their view less controversial, approach to gender equality mainstreaming. In such cases, Sida has an opportunity to be more pro-active in its dialogue with interventions. One way of addressing a conservative environment and broadening the interpretation of what gender equality means is to base dialogue on South Africa’s Constitution, legislation, policy instruments and international commitments.

Institutional Capacity and Resources:

Three of the four South African interventions had either gone through one implementation phase only or had been completed in less than two years. This is an inadequate amount of time in which to see components of gender mainstreaming taking root. As interventions enter new phases, it is important that the lessons about gender mainstreaming that have been gained are not lost, but rather are built on. Given staff turn-over and project implementers who are on fixed period contracts, it is important that monitoring systems to track the effects of gender mainstreaming are established or, where they already exist, made gender-relevant. In the absence of monitoring data, the South African evaluation team had to rely on institutional memory, which is shallow, and on the reported experiences of stakeholders in order to “reconstruct” what had taken place in interventions. The team recognises that M & E takes resources, human and financial, and the need to inject some gender expertise into an M & E system is also necessary. In order to learn lessons about experiences in working with gender mainstreaming, related to poverty reduction, building capacity in M & E is a high priority for the future.

Building Capacity:

Gender training was an important component of work with gender equality issues in three of the four South African interventions. The Embassy played an important part in supporting and contributing to training, which – as key informants told the evaluation team – was important in building interest in gender issues. At the same time, constraints such as the timing of training and the lack of follow-up to introductory training were noted. LGDSP phase 2 will offer an important opportunity to build on experiences acquired in the first phase because a gender training team will be established to train others. It is important that gender training incorporates training in poverty reduction issues (and vice versa). In general, the evaluation team noted that opportunities to build capacity of local civil society partners in gender training and gender analysis and to link them to interventions could contribute to sustainability of efforts. National gender trainers, who include men, could also be linked to interventions to support intervention and partner institution capacity building.

The evaluation team found that the guidelines and other tools that Sida has produced and circulated to partners are not being widely used. As one aspect of supporting capacity building of partners, the possibility of utilising appropriate locally developed tools and supporting the development of new ones should be explored.

Conclusion

The evaluation has recognised that gender equality mainstreaming is relatively recent, complex and requires bringing together many elements. The findings showed that the four interventions studied had taken up some elements of mainstreaming, to varying degrees and in a partial way. Having an

intervention structure (LGDSP) and an institutional structure (StatsSA) for mainstreaming, ownership and commitment (KCC) and building capacity through gender training contributed to building up experience in what, to most stakeholders outside Sida, was a new area. Interest was generated, individual understanding and commitment was obtained, and some institutional basis for future work on gender mainstreaming was established. These are no small achievements.

Sida needs to persist in working to support mainstreaming, within Sida itself and with partners. It is the most viable strategy for achieving gender equality goals. Because mainstreaming is still relatively new and experiences have not accumulated, it is important to continue to encourage efforts rather than to allow pessimism to develop. One South African evaluator, referring to Sida-funded urban development projects, wrote, “there was a feeling that Sida was expecting the pilot towns ‘to do things that the Swedes can’t do.’”³⁸ It is important to recognise that development of mainstreaming capacity takes time, much more time than the short life span of these interventions allowed. It also takes considerable experience and expertise, which was available to the interventions studied mostly on an *ad hoc* and intermittent basis.

The evaluation team believes that now that some basis for gender mainstreaming has been established and has started to take root, there are good opportunities for Sida in partnership with South Africa to promote gender equality as a means (to democracy and development) as well as an end. There is now a momentum that can be nurtured and supported.

³⁸ *Development Co-operation Report*, op. cit., p. 63

Chapter 5

Poverty Reduction and Gender Equality

“The principal goal of Swedish development co-operation is to raise the quality of life of poor peoples. . . . [R]aising the quality of life is not a matter simply of improving the incomes of the poor. It consists also of guaranteeing the poor, particularly women and children, their human rights and freedoms, opening up their range of choice, improving their environment and security and enabling poor women and men to participate in development processes. Most of all, it means increasing people’s capacity to provide for themselves and lift themselves out of poverty.”³⁹

Sida’s overarching goal, as stated above, includes a multi-dimensional interpretation of poverty. This section examines the relationship between gender inequality and the various dimensions of poverty, in particular access to livelihood improvement, services, knowledge and rights. It explores whether and how this relationship is dealt with in the four interventions. Of particular interest are the questions of whether poverty reduction can be addressed without working to reduce gender inequalities and to what degree there are synergies between poverty reduction and gender equality.

Findings

By African standards, South Africa is a rich country but also one with severe poverty that has racial, gender and regional dimensions. However, the poverty situation is not well documented, as a recent publication from Statistics SA explains (see adjacent box).⁴⁰

“Reduction of poverty and inequality has been a central concern of South Africa’s government since 1994. Yet quantitative description and analysis in this field has been slow to emerge. The main reason is that evidence has had to be built up (mainly by Statistics South Africa) from a very limited historical base.” – StatsSA

Poor urban women whom the evaluation team met clearly expressed how they experienced the links between gender inequality and vulnerability to poverty in their own lives. For

³⁹ *Sida’s Poverty Programme; Action Programme to Promote Sustainable Livelihoods for the Poor and to Combat Poverty, Sida, December 1996, pp. 1–2*

⁴⁰ *Measuring poverty in South Africa, Statistics South Africa, 2000, p.1*

them, equality was a necessary condition for escape from poverty (see the following box).

Unequal gender relations make women responsible for poverty reduction:

- “Poverty is more of a woman’s problem – men always expect things to be done for them. Even if you discuss poverty problems in the house, the man expects you to deal with the situation. On top of that, women are sometimes beaten up because there is no food in the house.”
- “Poverty is a problem for everyone in the house, but the woman is the only one who does something to solve the problem. Children expect the mother to solve, not the father. They know he will sit at home the whole day. He is not doing anything, he is there – just a living ghost.”

Poverty and men’s roles:

- “When women earn money they put food on the table, and when men earn money they drink to ignore their poverty problem.”

Gender equality as a necessary pre-condition for poverty reduction:

- “Give jobs to women so that women can be less dependant on men. If she doesn’t have to depend on his salary, she will be able to take care of the family. She will be free to do what *she* believes is the right thing to do. Then women can be more independent.”

Source – participatory focus group with women members of community development projects conducted during the evaluation

Statistics SA has been working to document trends in the country’s poverty situation and to present those trends by race, gender and geographical location. The *1999 October Household Survey*⁴¹ put particular emphasis on poverty indicators, and gender equality was highlighted as an important variable. For example, in comparing core development indicators in the 1996 and 1999 October Household Surveys, gender equality was one of three categories covered, in addition to social development and environment. Under gender equality, the core indicators showed that the ratio of female to male enrolments for secondary education had improved during the three years (from 0.89 to 0.93). The proportion of employed women and men in different types of occupation in 1999 was given as an example of gender inequalities, showing that there were more men than women in managerial jobs and that women were clustered in lower status and less valued jobs such as domestic service.

An important, earlier publication (funded by Sida) was *Women and Men in South Africa*. It analyses differences in women’s and men’s economic and other situations. Based on the 1996 population census, this publication shows, by way of example, that “the average African woman employee’s earnings were only

⁴¹ *October household survey 1999*, Statistics South Africa, 31 July 2000

43% those of the average white woman employee and only just over a quarter (26%) of the average white man employee.”⁴²

Therefore, StatsSA is making an important contribution to improve documentation of the racial, gender, and geographic dimensions of poverty. There is limited analysis in the statistical publications, however. One official, representing senior management, explained to the evaluation team that StatsSA is currently under-resourced in the areas of research and interpretation of data.

The other three interventions studied exhibited variation in the way and degree to which poverty issues were addressed and to what degree (or if) the gender dimensions of poverty were taken into consideration.

A strong poverty perspective was built into the design of **LGDSP**. Poverty alleviation was one of the three themes of the provincial Gender, Poverty and Children’s Issues Task Team and was the thematic focus of the municipal Poverty Alleviation, Job Creation and One-Stop Mobile Centre Task Team. In the training module, *Fighting Poverty*, the basic features of being poor in South Africa are described as: “isolation from the community, malnourished children, crowded homes, using basic forms of energy, no-one in the household is employed and families are split up as individuals leave for migrant work, or dependants are sent to live with wealthier relatives.” This excellent, multi-dimensional understanding of what poverty entails would have been even stronger had it been supported by gender analysis so that the different ways in which women, men, girls and boys experience poverty and can escape from it are clear. The large section of the manual that deals with job creation is oriented towards business development, which would have been further enhanced if a gender perspective had been added.

Apart from the Poverty Alleviation Task Team, LGDSP as a whole addressed several key poverty dimensions. It promoted the principle of democratic participation through supporting citizens (previously excluded under *apartheid*) to have better knowledge of local government and to know their rights. Efforts were made to strengthen people’s ability to exercise their right to hold local governments accountable by demanding better and more relevant services. The evaluation team was given one example where a poor community had demanded the resignation of their entire council, which had implemented a new sanitation system that residents found inadequate and inappropriate.

Through its interpretation of gender equality in terms of representation and gender balance, LGDSP enabled low-income women to take part in decision-making processes through membership in Task Teams. On the other hand, the concrete activities of the Poverty Alleviation Task Team did not take gender issues into consideration, and men – in the view of stakeholders with whom the evaluation team spoke – received more opportunities.

⁴² *Women and men in South Africa*, Central Statistics, 1998, p. 24

The links between poverty and gender inequalities were not highly explicit and therefore not fully developed in LGDSP. Individual members of the GPC Task Team could articulate the link between gender inequality and vulnerability to poverty, as indicated by one woman (see box which follows). The ability to make this kind of explicit linkage had not been sufficiently institutionalised within LGDSP training and procedures, however.

“When a child comes home from school and says, ‘Mummy I’m hungry,’ a very poor mother may not have food in the house and no money to buy anything. A young girl can be tempted to get food for herself by going for sex work. A boy on the other hand can go to the local petrol station, direct the drivers and be given a few pennies to buy food for himself.” – *female GPC TT member*

Turning to the urban development programmes, job creation was an important priority in both CUP and TPL. Job creation is generally seen as a poverty alleviation strategy. The same is true of support for the informal sector, to which the urban plan produced in **CUP** promised to pay special attention.⁴³ Job creation was also one aim of **TPL**, even though the jobs created were few and of short duration.

Beyond job creation, TPL gave the residents of poor urban neighbourhoods a new pride in the improved physical appearance of their environment, and the project circulated to residents through the media a substantial amount of informative material on environmental issues. Both TPL and CUP undertook consultative processes with municipal residents in poor areas, and for many, including officers at the Council, this was the first time in the new South Africa that ordinary, especially poor residents had the opportunity to make their views heard. Thus, both projects contributed to bringing the formerly excluded into democratic processes, where they acquired new knowledge and had the opportunity to exercise their rights.

On the other hand, some officials at KCC (and elsewhere) with whom the evaluation team spoke did not make explicit links between gender and poverty: that women and men experience poverty differently, that the possibilities to escape from poverty are not uniform across lines of race and sex, and that a gender equality perspective will make poverty reduction efforts more effective. Instead, the blanket statement that “unemployment affects both women and men” was made to the evaluation team frequently.

In summary, The interventions made diverse contributions to poverty reduction. CUP highlighted job creation as a poverty alleviation strategy, and TPL put job creation into practice, albeit on a limited scale. Both interventions gave poor people access to knowledge and the possibility to exercise the right to express their views about local governance issues. LGDSP had an explicit poverty alleviation strategy, focused primarily on job creation, but in addition supported women’s access to decision-making positions and the improve-

⁴³ *Caring for our Future*, op. cit., p. 21

ment of residents' access to services from their local governments. StatsSA has taken important steps to improve documentation of the country's poverty situation. Apart from StatsSA, the evaluation team did not find that the links between poverty reduction and gender equality had been explicitly made in the interventions.

Analysis

Because poverty is widespread and severe and reducing poverty is a South African national priority, it is understandable why stakeholders whom the evaluation team met tended to make blanket statements about who is affected by poverty. One argument that the team heard is that there are many poor men as well as women and that *any* poverty alleviation effort will more or less automatically assist both.

If one makes a further analysis of poverty reduction activities in the interventions studied, it becomes clear that including a gender perspective could have made activities more targeted. Looking at job creation in LGDSP, for example, one could ask such questions as the following:

- What are the current livelihood activities of women, men, girls and boys in specific parts of the Northern Cape?
- How does each group experience poverty, in terms of their access to resources, to services and to knowledge and the ability to exercise their rights?
- Where clear gender/race/age/class-based priorities are identified, how can the intervention address these explicitly?
- By addressing gender and other divisions directly in poverty alleviation efforts, (how) will this strengthen poverty reduction activities and make a contribution to reducing gender inequalities?

To take a second example: CUP intends to make improvements in transport between the distant residential suburbs, which house many poor people, and the city centre of Kimberley. A Review⁴⁴ stated that there were no funds dedicated to producing a gender analysis in the Transport Study. The Transport Study *was* carried out, apparently without a gender dimension integrated. Had it been integrated, important questions, including the following, could have been raised:

- What are low-income men's employment patterns (e.g. in the mines and farms around Kimberley) and what are their transport needs – routes, scheduling, etc.?
- How are women's employment patterns (as domestic workers for example) served by public transport, as well as their access to shops and health facilities?

⁴⁴ "Gender Review of the Sida-Supported Urban Development Programme, op. cit., p. 10

- What percentages of girls and of boys leave their residential areas to attend schools elsewhere, and are their transport needs (e.g. schedules) being met?

The contributions made by the interventions to poverty reduction were important but at the same time provided lessons about the value that could be added by factoring gender and other dimensions of social difference into the equation so as to more clearly link poverty and gender.

Conclusion

The poor women quoted at the beginning of this section were clear about their strategic gender interests – to have access to jobs and incomes and the right to use their incomes to lift themselves and their dependants out of poverty. One lesson for working with interventions in the future is that primary stakeholders can articulate gender/poverty synergies based on their own experiences, and that these experiences are gendered.

As South Africans have access to more information about the dimensions of poverty in the country, Sida will have new opportunities to strengthen linkages between the gender equality and poverty reduction goals. It will be important, in this context, that the next Country Strategy and future project and programme designs are based on solid analysis of the relevant local poverty situation, drawing attention throughout to its gender and other social dimensions. The findings of the evaluation support Sida's view that a multi-dimensional understanding of poverty must necessarily be gender sensitive. However, the team also wishes to stress that gender equality must be an explicit goal when linked to poverty reduction to ensure that gender issues are not taken for granted and are therefore not addressed.

Chapter 6

Stakeholder Participation and Gender Equality

Under *apartheid* the majority of South Africans were excluded from participation in democratic processes and had no say in decisions that affected their own lives and well being. Since 1994 participation is a fundamental right, backed up by government's decision that public institutions must include participatory mechanisms in their processes and activities. However, development of strategies to foster participation is still a new area, and there is limited experience, including the types of mechanisms that are relevant for specific purposes.

This section examines the strategies and mechanisms for stakeholder participation in the four interventions. It assesses the forms of stakeholder participation and looks at the type of involvement by and the interests of stakeholders in participation, including implementers (secondary stakeholders) as well as beneficiaries (primary stakeholders). In this discussion the relationship between stakeholder participation and gender equality in each of the four interventions will be the main focus. (See Annex 2 for stakeholder analyses of each intervention.)

Findings

6.1 Statistics South Africa

At Statistics South Africa the evaluation team looked at groups that can be identified as primary stakeholders – those who will be positively or negatively affected by the intervention. Two groups were identified – provincial statistical offices and users of gender-relevant statistical data. Since the bulk of the evaluation period was spent in the Northern Cape, relevant information comes largely from this province.⁴⁵

Swedish TA has been important in building a structure of provincial statistical offices, although this is still a work-in-progress rather than a completed

⁴⁵ The evaluation team did not assess users of gender-relevant data at national level because there was no easy or systematic way to do this in the short evaluation period. The Gender Unit does not have regular, structured contacts with users of gender-relevant data. The head of the Gender Unit used to sit on the Statistics Council, a forum for exchange of views between producers and users of statistics, but has since resigned. She told the evaluation team that she had borne the main responsibility for raising issues about gender perspectives at the Council.

exercise. The provincial offices are responsible for organising field surveys and collecting statistical data for censuses and surveys, including special or one-off surveys such as the Time Use Survey. They do not carry out survey design or data analysis and are not (yet) permitted to accept commissioned survey work from provincial clients. They are expected, however, to build relationships with other provincial producers and users of statistics. The statistical office for the Northern Cape in Kimberley described itself as being nothing more than a “post office box” for headquarters in Pretoria. They feel marginalised.

Recent production of a provincial statistical profile is a case in point. The contents of the profile were based on a “skeleton” of tables developed by a Statistics Sweden consultant and revised after discussion with provincial users. The provincial office wanted to include some analytical text as well as tables in their profile, a proposal not acceptable to headquarters. There was no discussion of including gender-relevant data, although sex-disaggregated data were included, “as normal” and where thought to be relevant. This type of participation may be characterised as “instrumental,” in that headquarters uses the provincial office for cost- and time-efficiency reasons. The provincial office participates by collecting information and passing it to the centre.

Provincial statistics officers told the evaluation team that they currently have few opportunities to learn more about what statistics can reveal, e.g. how they may document gender inequalities. When data were being collected in the Time Use Survey for example, provincial officers who participated were not completely clear about the purpose of the survey – other than the fact that it would show how different types of people use their time. They said they did not know that one could anticipate time-use differences between women and men, girls and boys, and that these differences could reveal gender inequalities in reproductive and productive labour of importance for development. Given the interest that this topic generated during discussions with the evaluation team, there seem to be potentials for fostering dialogue on gender-relevant statistics within the programme of co-operation.

Although StatsSA does not have something that might be labelled a “participation strategy,” its market research strategy with regard to clients – users of statistical data – has participatory elements. A provincial office is expected to know who its users are and to engage them in dialogue about their data needs. StatsSA in NCP told the evaluation team that they had not yet had a purposeful dialogue with local users of statistics on gender issues. Nor had they ever had an explicit request from a user, either for sex-disaggregated or for gender-relevant data. However in their efforts to build user-producer relationships, they identify government departments and NGOs that might be interested in the topic of a new publication. For example, when a publication on rape⁴⁶ was released, the office presented copies to departments they felt might be interested, such as Justice and Welfare. Using the classification of

⁴⁶ *Quantitative research findings on Rape in South Africa*, Statistics South Africa, 2000

levels of participation developed for the evaluation (see section 1.2.5), clients are “passive participants” – that is, recipients of information from the provincial office. The office would, however, like more “interactive participation” in the future and to this end has recently created a Statistical Forum to bring provincial statistical producers and users together.

The evaluation team also looked at participation from the point of view of provincial users of statistics. The intent was to understand whether, or to what degree, provincial government departments and other users are aware of the relevance of gender dimensions in sectoral planning and whether there is current or potential demand for gender-relevant data. At a mini-workshop, users were asked to “imagine themselves as members of a multi-disciplinary committee to plan interventions to improve the quality of life of residents of a new low-cost housing project.” The participatory exercise was organised in several stages, to elicit statistical needs and to understand whether participants had experience in including gender issues in their assessment of data needs. It required a great deal of discussion for participants to “look at the different types of people, behind the data which they needed” and to conclude that sex-disaggregated statistical data would be useful. The box gives one example of a gender analysis that participants made.

This example shows that statistical users in Kimberley *can* make a simple gender analysis that includes cultural factors and unequal power relations. This was a new way of thinking, however, indicating that greater familiarity with gender issues will be needed before users become more pro-active clients/participants vis-à-vis StatsSA.

Planning Sexually Transmitted Diseases (STD) services in a local health clinic:

If we were planning for provision of STD services at the health clinic in a new low-cost housing development, we would need to provide information to both women and men, and we would also need counselling services to encourage couples to come in together. When a wife doesn't bear a child, it is customary for the man to assume that the wife is to blame, that she is the one who is infertile. If he suspects that she has an STD, he will send her to get STD services at the health clinic. He won't want to go himself, and he won't suggest that he and his wife should go together. The wife won't have the courage to suggest that her husband should also go, or that they should go together.

– source: analysis made by participants at provincial statistics workshop, convened by the evaluation

6.2 LGDSP

LGDSP had a strategy (or approach) of using democratic processes to build the capacity of municipal task teams, composed of elected councillors, staff and community leaders, *so as to* improve delivery of services to residents. Implicit within this was the assumption that task teams would develop mecha-

“Men didn’t want to take advice from us. We didn’t have the power to overrule them; we were only three. Usually there would only be one woman at team meetings (because of distance and transport difficulties), and being a loner in a group can easily lead to a situation where the men hate you. I tried hard to speak out but some men were not supportive.” – *woman task team member, reflecting on her participation*

nisms through which primary stakeholders – residents in municipalities – would be able to express their needs and priorities. The structure of task teams was meant to ensure that both women and men would participate and that diverse views would be taken into account in planning and implementation of activities. The evaluation therefore looked at two forms

of participation – that within task teams and between task teams and their communities.

Looking first at participation within task teams. There were diverse views, among task team members whom the evaluation team met, on women’s participation. One man said, “the women’s influence was very limited. They did not want to participate. They were there as carry bags [that is, as baggage.] We had to think for them.” A woman in the same team had a very different view, given in the box above. Race was also an issue. A black woman member of another task team who had experience with gender was moved out of the team on grounds that “she knew too much about gender issues.” She suspected that she was not welcome in a team dominated by whites: “what else? Why would they reject me if I had more experience on gender issues?” The evaluation team was told that some task teams built cordial and cooperative working relationships that fostered participation. However, in the case of one team that the evaluation team met, one person seemed to have dominated team decisions and to have used the programme for personal benefits of power and prestige.

LGDSP took steps to develop mechanisms to facilitate participation by primary stakeholders – residents of municipalities – to enable them to express their problems, needs, constraints and priorities. In some cases efforts were made to include a gender perspective in eliciting community views. For example, the GPC TT worked with the water team to ask women in a particular locality about their preferences and to take the safety and security of women and children into consideration. However, a clear process for eliciting the views of diverse categories of primary stakeholders was not institutionalised; rather the very idea of talking to stakeholders needed time to take root. When asked what he would do over again, if he had the chance, one team member said that he would consult people more about their needs – based on hindsight that some projects that the team had been involved in had not been successful for the very reason of lack of consultation.

Two task teams addressed the issue of community participation by carrying out or commissioning needs assessment surveys to identify problems and priorities in their communities. As earlier discussed, the sex-disaggregated data that were

collected were subsequently aggregated, thus restricting the possibility of gender analysis of findings to feed into design of activities. The surveys also appear to have raised expectations within the community that, by having been asked to express their views, these would be considered when decisions were taken. For example, the survey made by the Children's Issues Task Team concentrated on the state of children's welfare in their homes. However, children whom the evaluation team met said that no one from the community had come back to them, after they had responded to the survey, and that they had concerns, such as lack of sports facilities, that were not addressed.

The initiatives taken by LGDSP through task teams over two years provide a basis for supporting more meaningful and gender-sensitive primary stakeholder participation in the future. Although the approach of supporting municipal task teams to provide better services to their communities will continue in Phase 2, teams that worked hard in the first phase were uncertain about their own future participation. Neither the donor, the provincial department nor the programme management had told them whether the momentum they had created would be supported in the future, and they were discouraged, both by the silence and the period of time that had elapsed. The evaluation team is of the view that key stakeholders have the responsibility to ensure that communication takes place and is clear. The experiences of working with participation should be built on as LGDSP enters its second phase, not lost.

6.3 The Urban Development Programmes

Both *CUP* and *TPL* developed strategies to foster KCC's interaction with residents of the communities that comprise the city of Kimberley. These and other Sida-funded projects being implemented at the same time represented KCC's first attempts to engage community residents in urban planning processes and projects and to give residents a platform from which to take informed decisions. The concept of participation by community stakeholders was introduced to the KCC by the consultants (*CUP*) and with support from the embassy (*TPL*). The need for stakeholder participation was easily accepted as it was in line with government's insistence that democratic mechanisms, including participation of ordinary citizens in decisions about their own lives, must be paramount in the new South Africa.

KCC invested a great deal of time and effort in *CUP* to implement a participation strategy, called the Public Participation Programme. PPP was designed to pass information about the integrated urban planning process to residents and at the same time to allow them to express their views and needs in a bottom-up approach. In particular, the intention was to "plan with the people, not for the people."

Kimberley is a big city, at that time estimated to have more than 200,000 persons. *CUP* was publicised through the mass media, pamphlets and posters. An important component of PPP were large community meetings, which were very well attended by women and men alike, attracting in one case for

example 300 people. KCC made substantial efforts to solicit diverse views from participants at meetings. Facilitators were told to encourage women to speak and to attempt to bring out gender-based differences in the views presented. Women were encouraged to take the lead and to make presentations within working groups at meetings. As people expressed their views, these were listed and exhibited with an overhead projector and presented at follow-up meetings. KCC officials told the evaluation team that women did speak out. However, the two aims of reaching and involving many residents, and then enabling their diverse views to be clearly reflected in planning decisions, was perhaps over-ambitious given the short period of time allocated.

Because PPP was the first large participatory exercise of KCC, their efforts to pass information to as many residents as possible about the issues involved in integrated comprehensive urban planning must be acknowledged. However, the efforts also made to make PPP as bottom-up as possible, by enabling residents to express their needs and views, could have been strengthened if the diverse views elicited had been reflected in the Plan itself. In particular, the different views expressed by different categories of women and men, by race and other factors of social difference, are not made explicit in the comprehensive urban plan.

Although *TPL* began as a technical project, with few participatory elements, the Embassy supported KCC to develop a participatory approach within the project. One aspect of this was to inform as many residents as possible. A national NGO was contracted to develop and implement an information campaign through the media about the tree planting component and about urban environmental issues generally. There were also media initiatives directed at particular groups, such as school children.⁴⁷

The *TPL* activities – planting trees and paving sidewalks in particular – that took place in several formerly excluded residential areas of Kimberley, involved the community – as workers on labour intensive works and as recipients of the improvements. The evaluation team attempted to look into the degree to which local residents felt informed and viewed *TPL* as “their” project. The evaluation team also examined the degree to which participation was linked to gender issues. As a mechanism to foster community participation, KCC relied on intermediaries – local politicians and community representatives meeting in a Community Development Forum. The *TPL* Steering Committee was not always able to ensure that decisions about promoting participation as widely as possible were followed. For example, KCC staff told the Gender Review⁴⁸ that Steering Committee instructions that women be considered in recruiting workers (to meet the 30% minimum target) were not always followed. Also, that there was some degree of patronage by local politicians in awarding jobs.

⁴⁷ Final Report to: the Kimberley City Council, Sida & Impak Consulting Engineers on the Kimberley Bontle Tree Project, November 1998

⁴⁸ Gender Review of the Sida-supported Urban Development Programme, p. 13

It is clear that KCC made efforts and developed mechanisms to foster a sense of community ownership of TPL and participation in it. In general, residents appreciated the improvements to their urban environment. However, some of the comments made by residents to the evaluation team reveal that a new approach, like participation, requires continuous and sustained efforts, not easily obtained during a short period of time. Some residents told the evaluation team that TPL was a “Sida/KCC project”, not their own. Other residents said politicians had used the project to support their own chances of re-election. “This was an idea of some politicians,” we were told. One young man said, “We needed jobs and would have been interested to apply. We made contact with the people in charge but were told that the project was already full. We [then] saw that a lot of the workers came from outside this neighbourhood.” The media campaign clearly did not reach everyone. One woman said, “We saw people starting working. We hadn’t been informed. People didn’t even come to the house to let us know.” She was poor, with dependants to look after, and said, “This project is the last thing we would have asked for.” Another, obviously better-off woman on the same street, knew no more about the project than her neighbour; however, “I like my tree [in front of her house] and I take care of it,” she said.

In order to hear residents’ views on their needs and priorities and on how they see participation, the evaluation team conducted a participatory focus group discussion with residents in a housing project that had been targeted for Sida support as an adjunct to CUP.⁴⁹ We asked participants, “If you had all the power to decide, how would you like to see things change?” This generated clusters of answers on the themes of job creation, combating crime, youth problems and on participation, the latter given in the box below. Fostering participation clearly raises residents’ expectations.

In summary, the three interventions that worked at community level all developed approaches to foster community participation. In LGDSP gender equality issues were addressed through representation of both women and men in municipal task teams. Some initiatives were made to solicit the views of members of the communities that task teams represented, but gender issues did not have much

visibility within these initiatives. KCC tackled participatory issues for the first time in the context of Sida-funded projects. In CUP there were extensive efforts made through the Public Participation Programme to give residents the

- “Municipalities should get more transparent with the community and involve all stakeholders in decision making.”
- “Give the community a platform for freedom of speech.”
- “People to get their dignity back.”

Source: responses about participation at a focus group discussion organised by the evaluation

⁴⁹ The planned support never materialised. Residents were not informed and did not understand the reasons for this.

ability to exercise their right to make their voices heard. Women's voices were heard, though theirs and other diverse views were not clearly reflected in the Plan. In TPL there were efforts to establish mechanisms to inform and to consult with residents, to engage them in the work opportunities that the project offered and to include women as well as men.

Analysis

Democracy in South Africa is still deeply affected by the *apartheid* years. The lost opportunities for genuine and equal participation by people of all races and both sexes affect the structures of Sida's partner organisations, such as KCC and other municipalities, which today are to promote community participation in interventions. There is only a very short history of consulting with people, on which to build. Many stakeholders, and not only those who are foreign and external, do not fully comprehend the constraints embedded in this historical fact.

Referring to the scale that ranks levels of primary stakeholder participation (see section 1.2.5), it is clear that the interventions studied in South Africa made progress in fostering some types of participation, but none reached the level of interactive participation (level 6) in which people are able to have a say in decisions that impact on their own welfare. The types of participation identified included the following:

- “functional” participation, where a group is created to meet a pre-determined project objective, as with the municipal task teams in LGDSP;
- “representative participation” to give representatives of the people a voice in determining their own development, as in LGDSP and CUP;
- “passive participation,” where community members primarily receive information, as with TPL;
- participation in information giving, as in the surveys conducted under LGDSP;
- participation by consultation, as with PPP in CUP, and
- participation for material incentives, as with the labour intensive components of TPL.

More meaningful types of participation, in which mechanisms are developed that give people the opportunity to take part in decision-making and to genuinely influence decisions need careful approaches and must grow over time. In NCP where there are race/ethnic, gender and class divisions, an intervention of short duration can establish a basis for working towards meaningful types of participation, rather than treating beneficiaries as passive recipients of information or as providers of information to meet project objectives. Although there should be care in designing approaches to participation, meaningful participation is vital in overcoming the heritage of exclusion.

The types of participation identified in the interventions included some attention to gender issues. Some interventions integrated gender equality into

participatory mechanisms through representation and participation of women and men – in task teams, at meetings and so on. For some implementers, the realisation that women’s voices were important because they had their own priorities was an eye opener. “I would never have learned to listen with ‘gender-sensitive ears’ if it hadn’t been for CUP,” said one white male urban planner. KCC officials said that they had come to realise, in retrospect, that meetings could have been better timed to suit the diverse needs of community members. Rather than working entirely through wards, they now saw the necessity of getting all people involved, “including at street level.” And they had discovered that they should have analysed the responses of women and men to various urban planning issues collected during the PPP and reflected these in the Plan. Such learning experiences provide an important basis for taking participatory processes forward.

Conclusion

Short-duration interventions, such as CUP and TPL, and interventions that enable building on lessons learned from one phase to the next, such as LGD-SP, provide opportunities to link participation and gender equality. In the South African context, it is important to promote dialogue about WHY participation is vital and HOW to achieve meaningful participation. The evaluation team believes that national consultants with practical hands-on experience are needed to help build capacity in interventions over time, rather than relying on foreign consultants or assuming that local staff have the necessary commitment and skills. The evaluation team witnessed growing interest and willingness to work with community stakeholders, demonstrating that opportunities have been created through the interventions. These opportunities should be nurtured or they risk being lost. Just as with poverty reduction, it is necessary to make explicit links between gender equality and participation. Allowing rhetoric on poverty reduction, gender equality and participation to prevail without serious accompanying actions undermines people’s confidence in the benefits of democracy and development.

Chapter 7

Changes in Gender Equality

This chapter has two parts: first, a discussion of the meanings of concepts in the South African context and second, an examination of the changes that have taken place in the four interventions. These two parts are related to each other. One of the objectives of the evaluation was to provide a deeper understanding of the local concrete meanings attached to specific concepts: gender equality, women's empowerment and strategic and practical changes with regard to gender equality. The evaluation team asked, "what do these concepts mean in the context of South Africa, given its particular history and current social dynamics, and what do they mean to various stakeholders in the context of the four interventions?" Locally constructed meanings are one of the factors that play a role in influencing how gender equality has been approached and what changes may have been set in motion. Having looked at the dimensions of locally constructed meanings, this chapter then tackles the question of what has changed in the interventions, either as a result of the intervention or as a result of processes taking place in the larger socio-political environment.

7.1 Concepts – their Locally Constructed Meanings

Findings

Those who work with gender equality in South Africa and Sweden share common understandings of the general meanings of the concepts that are the subject of this evaluation. These common understandings are that gender equality refers to the equal rights, responsibilities and opportunities of women and men and of girls and boys; that promoting the conditions for women's empowerment can be either an end and/or a means to achieve gender equality; and that the strategy of mainstreaming involves integrating attention to and meeting the needs and priorities of both women and men, both at policy and at intervention levels. The similarities in conceptual understanding, by Sida and by relevant institutions in South Africa, provide a common basis for communication. Two South African definitions of *gender equality* (or equity – the terms are often used as synonyms) are given in the following box.⁵⁰

⁵⁰ The first definition comes from *A Report on Poverty, Gender and Integrated Development Planning in South African Municipal Practice*, Department of Provincial and Local Government, April 2000, p.1. The second comes from the Commission on Gender Equality, *A framework for transforming gender relations in South Africa*, 2000, p 66

“Gender equity in a developmental context is about ensuring that poor women and poor men have equal understanding of, access to and control over social, political and economic resources in post apartheid South Africa.” – *Department of Provincial and Local Government*

“Gender equality . . . means the equal employment by men and women of socially valued goods, opportunities, resources and rewards. . . A crucial aspect of equality is the empowerment of women to influence what is valued and [to] share in decision making about societal priorities. Gender equality entails that the underlying causes of discrimination are systematically identified and removed in order to give men and women equal opportunities. The concept of gender equality . . . takes into account women’s subordinate position within social relations and aims at the restructuring of society so as to eradicate male domination.” – *Commission on Gender Equality*

Five dimensions of the meaning of gender equality, as key institutions in South Africa use the concept, should be noted. First, definitions are based on a *human rights perspective* – the equal and inalienable rights of all women and men that are enshrined in the Bill of Rights of the Constitution (Act 108 of 1996). Women and men “should be treated with equal concern and respect, and should be entitled to develop to their full human potential.”⁵¹

Second, progress towards gender equality means that *unequal gender relationships* have to be challenged: “Our society tells us that women must be subordinate to men, that they should have less power, less opportunities, and less access to resources than men. . . We do not have to accept the present relations between men and women as natural and fixed.”⁵² The relational aspect of gender is therefore an important part of conceptual understanding and use.

Third, the *empowerment of women* is viewed both as a necessary process or means for achieving gender equality and as a goal in its own right. Women’s empowerment is an important means for achieving gender equality, a process for levelling the playing field in other words. However, it is also an end, as well as a means, in that individuals –

“In South Africa, the majority of the poorest, the homeless, the landless, the unemployed, the lowest paid workers and the violated are women. In addition women also often carry the burden of care for the young, the old, the sick and the disabled.”
– *Parliamentary Committee on the Improvement of the Quality of Life and Status of Women*

alone and in groups – benefit from strengthening their ability to challenge unequal power relationships. To the CGE, the women’s empowerment approach means “putting women at the centre of all processes for change.”⁵³ The Parliamentary Committee on the Improvement of the Quality of Life

⁵¹ A framework . . . , op. cit., p. 8

⁵² Ibid., p. 5

⁵³ Ibid., p. 3

and Status of Women focuses more on women's rights and women's empowerment than on unequal gender relations (see box on previous page).⁵⁴

Fourth, the South African goal of *transformative social change*, to eliminate all inherited structures and practices of injustice and inequality, quite naturally includes the concept of *strategic gender change* – paradigm shifts that challenge deep structural and systemic inequalities. “Strategic gender needs . . . refer to the requirements (e.g. equal employment opportunities, legal rights, protection from domestic violence) that would help women achieve greater equality, and can be controversial as they challenge the status quo.”⁵⁵

Fifth, and finally, the concept of gender equality includes a strong dimension of *representativity*: how many women/men of which races in which positions in which institutions. The Parliamentary Committee on the Improvement of the Quality of Life and Status of Women, for example, scrutinises the report of each government department to determine “the extent to which it has transformed itself, for example in relation to representativity at different levels,”⁵⁶ in addition to examining whether the work of a department has changed with respect to its impact on women.

Different stakeholders in NCP emphasise different aspects of these concepts. The Northern Cape is a large, conservative, rural province that is far from the corridors of power and policy making in Pretoria. At the time that three of the interventions (LGDSP, CUP and TPL) were being planned and implemented, key management positions in implementing institutions were dominated by white men, largely Afrikaans-speaking. All heads of department at Kimberley City Council, for example, were white men except for two who were white women. The small municipalities in which LGDSP formed task teams were similarly dominated by white male officials. Elected councillors in both the Kimberley and the small town councils included coloured and black men (and some women) who had their own perceptions of gender issues derived from deeply patriarchal cultural traditions.

The meanings attributed to the concepts used in this evaluation varied widely, therefore, depending on whom one talked to. Many secondary stakeholders emphasised the representativity dimension of gender equality – that it had to do with numbers of women and men – increasing the numbers of women (in a committee, in the council or on a task team, for example) in order to achieve gender balance. The evaluation team received the impression that stakeholders who are white were most comfortable equating gender equality primarily to representativity. One white woman who was a programme officer said that gender equality should not be seen as “women’s issues,” but rather as a “50/50 approach – to achieve a numerical equilibrium.” Other key stakeholders of other races – in particular men – also

⁵⁴ *Report on Government's Implementation of CEDAW and the Beijing Platform for Action*, Parliamentary Committee on the Improvement of the Quality of Life & Status of Women, November 1998, p. 2

⁵⁵ *A framework . . .*, op. cit., p. 68

⁵⁶ *Report on Government's Implementation . . .*, op. cit., p. 3

stressed the representativity dimension of gender equality. However, this widespread, but also narrow, interpretation should be contrasted with the explanation given by a black woman politician (see box), who pointed out that gender equality cannot be separated from racial equality in South Africa and that equality means treating people with tolerance and respect and honouring their dignity as human beings. The first explanation – numbers – covers only one aspect of gender equality. The second explanation is much more rooted in local experience that reflects historical realities.

The evaluation team noticed that white secondary stakeholders did not often speak of race and culture in relation to gender equality, nor mention the relevance of *dignity* and *respect* with reference to changing unequal gender and race relations. They could reflect on patriarchal attitudes that were part and parcel of Afrikaner culture, but in general they did not link cul-

In a political context in which “children have seen their parents stripped of their dignity by white men, where rape and violence are continuing to happen . . . we need to regain our dignity first, our humanity. . . they are part of the process of regaining our identity.”

– explanation of gender equality by a black woman

tural issues to local meanings of gender concepts. However, both race and culture became part of the dialogue when black and coloured women and men discussed equality. At a focus group with the Network on Violence against Women, for example, participants emphasised the need to recover traditions of respect – of men towards women (and vice versa) – and the need to empower men to realise the benefits that come from mutual respect between women and men; “in ancient times Africans could respect each other, why not now?”

Nonetheless, the most common explanations of gender equality that the evaluation team heard were “equal balance in numbers” and “involve or consider women.” Men, more than women, of all races were comfortable with these explanations. However, women, more than men, stressed that gender equality means moving “beyond numbers.” To some of the primary and secondary stakeholders with whom the evaluation team spoke, gender equality means challenging male stereotypes, such as encouraging women to take up jobs traditionally reserved for men such as construction work. It is also about power and giving women better access to decision-making positions: “It’s about giving women the right to take up positions. Men have always been in important power positions. We are trying to change these structures,” said a group of women councillors. Gender equality also means that women who have achieved high positions have the responsibility to be positive role models for other less privileged women.

A human rights perspective was common. “I am a woman, you are a man, but I am as important as you,” said a woman task team member. “If there is a position available, and we women have the same qualifications as men, we

should be able to get the same job, with the same salary,” explained women municipal councillors. A black woman resident of Kimberley gave a historical dimension to a rights perspective. “My mother’s generation believed that the man was the head of the household. My generation is starting to question this. My daughter’s generation believes that women and men are equal and have equal rights.”

Some black middle-class women were less militant about gender equality as a rights issue than were the less privileged. Said one such woman: “you don’t force gender onto someone. You don’t make gender a divisive issue between you and your husband and sons. Equality involves both women and men. I can’t approach my husband saying, ‘I as a woman have my rights.’ A better approach is to discuss within the family the need to share the load.” In the local context with its history of racial and gender injustice, there was support for the meaning of gender mainstreaming as “creating an environment in which women and men have mutual respect for each other,” as one person put it.

Analysis

The widespread and common interpretation of gender equality as representation and more balanced participation of women and men had an obvious effect on the way in which gender goals in the interventions studied were interpreted, and thus on the way that mainstreaming was applied. At StatsSA, apart from the Gender Unit, gender equality largely meant transforming the institution by making its staffing profile more representative. LGDSP did not expand its activities much beyond representativity, to broaden the way in which gender equality was interpreted. Efforts were made in CUP to take a broader perspective on gender equality, but in both CUP and TPL key stakeholders often began a discussion on gender equality by saying that women were present, women participated, women were very active, and so on. Within the conservative environment of NCP, interventions used the concept of gender equality primarily as a planning and implementation tool that would not be perceived as threatening.

The interventions also paid little attention to the concept of women’s empowerment. For example, this was deliberately avoided in LGDSP; “women’s empowerment, put so directly, is a concept that will scare people off,” said a project implementer. This message was well received by men. “It was good to hear (from project management) that men would still have a place,” said a male task team leader.

The evaluation team tried to apply the concepts of practical and strategic change in the context of the interventions. Although the terms *per se* were not used, the meanings embedded in these concepts *were* familiar. In discussing gender perspectives in municipal service delivery, urban planning officials had begun to learn how to factor in women and men’s practical needs. The idea of strategic change was obviously less familiar to bureaucrats, but it was

part and parcel of the reflections of many black women on their situation and on what needed to be changed – in particular unequal power and economic relations. The focus in LGDSP, on giving women the opportunity to participate in decision-making bodies such as task teams, obviously had strategic implications for those in these bodies. By participating actively in a representative body, they increased their knowledge and were in a position to speak out about women’s subordination in their local societies, if they chose to. The intervention did not build on the strategic implications for women, nor specifically enlist men’s support however.

The evaluation team found little evidence of any thinking on male roles in the context of progress towards gender equality and women’s empowerment in the four interventions. The team was told by a few key informants that men have a responsibility to contribute to equal opportunities for both women and men but heard no examples of male roles being questioned. This was not the case, however, among young black and coloured men and women who participated in a focus group with the Network on Violence against Women.⁵⁷ An open-ended question about important problems that their organisations were addressing produced answers such as, “men must be sensitised about women’s rights,” and “insensitive and arrogant men” are the problem. A potential for strategic change was identified: “to empower men’s organisations to work on preventing violence.” The concept of male roles, and the extent of debate and action on this in South Africa, appears in Annex 4.

In summary, the various dimensions of gender equality concepts – including a human rights perspective, attention to unequal gender relationships, women’s empowerment, transformative social change and representativity – resonated differently with various categories of stakeholders in NCP. Whereas the interventions tended to single out representativity, primary stakeholders explained the concepts with reference to their social positioning. Thus, black men were comfortable with representativity, including some who made it clear that this should not significantly challenge their position of superiority. Black women identified more broadly with a rights perspective and with women’s empowerment and, in addition, linked gender justice to racial, social and cultural issues, including tolerance, dignity and respect.

7.2 Changes towards Gender Equality

Gender equality goals aim to redress unequal gender relations and to transform processes and structures in which inequality is embedded. Change would mean that previously unequal relations are changing in the direction of greater equality. Change would also mean that family, market and governmental structures and relations support more equal gender relationships. To document and measure any aspect of these types of change, an intervention

⁵⁷ Sida supports the Network, outside of the country frame through support to civil society organisations.

should set clear targets, indicators that establish the degree to which change is taking place and monitoring to track the process. Such indicators could be quantitative – how many women, compared to men, have benefited from a particular municipal service over time, for example. This indicator does not necessarily measure unequal gender relations however. A comparison of the number of men and women who physically take their children to a day care centre daily would give evidence about changing gender roles and relationships. Qualitative indicators are also important – do some women feel that they have gained in their personal development as a result of having accessed decision-making positions, for example? Are more men more supportive of gender equality goals in concrete ways than they were previously?

These standards for assessing change cannot be applied to the interventions studied in South Africa. We have seen, in Section 4.2 on gender equality goals and in Section 4.3 on mainstreaming of gender equality, that the interventions had different types of goals and that intervention structures and mechanisms to support mainstreaming, such as task teams and PPP, were largely temporary. None of the interventions had targets or indicators except for TPL, which had a *pro forma* target for women's participation in some project activities. In general, M & E systems had not yet been developed to allow the possibility of tracking changes over time.

The locally constructed meanings of gender equality, the nature of the goals, the (absence of) targets and indicators and the eclectic and partial implementation of mainstreaming, with some components of mainstreaming present and others absent, influence the types of changes that one can expect in the four interventions. The evaluation team therefore grappled with the question of change by asking diverse stakeholders whether the interventions with which they had been associated had produced changes, and if so – of what type and in which direction. What, we asked, had this particular intervention achieved with respect to promoting gender equality?

In addition to specific changes that support progress towards gender equality, the interventions have also produced other important changes. StatsSA *has* improved its survey designs so as to capture information on sections of the population that were previously invisible – farm, domestic and informal sector workers among others. LGDSP *has* strengthened the capacity of municipalities that took part in Phase 1 to improve their services to residents. The Water and Sanitation Task Team, for example, participated in making metered water systems acceptable to local communities, and this, *inter alia*, has benefited women by providing them with a more reliable domestic water source. TPL raised environmental awareness and planted 4,000 olive trees to promote economic activities. CUP made both planners and at least some segments of the community aware and appreciative of the benefits to be derived from integrated urban planning.

The concrete changes produced by interventions in the direction of gender equality that programme implementers reported were modest. The Water and Sanitation Task Team, under *LGDSP*, supported the implementation of

projects in their municipalities. In one project, reported the task team, 4 women had been employed compared to 30 men. Of the four interventions, *TPL* produced the most visible outputs, not least by creating short-term employment: in the paving component eight women and 22 men had been employed and in the tree planting component ten women and 15 men. Of the four emerging contractors trained by the project, one was a woman. These figures could, perhaps, have been more gender-balanced, but they do indicate that KCC made efforts to achieve its targets for women's participation. KCC officials also emphasised that hiring women for labour-intensive construction challenged gender stereotypes about who should do which type of work, though this was not a deliberate intention of the project. The Water and Sanitation Team, on the other hand, deliberately gave the lightest work to women, though in future, said one member, "we should give women the benefit of the doubt."

The representation of women and men within an institution was an important gender issue, as the analysis of locally relevant meanings of gender equality has made clear. At *KCC* key informants emphasised the increase in the number of women councillors compared to men: from four out of 25 after the first local government elections in 1995, to 22 out of 53 after the second elections in 2000. This increase could not be attributed to the intervention (LGDSP and KCC's Gender Task Team) however but rather to the policy of the ANC, the predominant political party in the region, which has a quota system requiring that names of women and men alternate on party lists. When the Gender Task Team was constituted in 1998, eighteen per cent of employees at KCC were women; two years later the figure was 20.7 per cent,⁵⁸ a modest change due to institutional affirmative action, which the intervention also advocated for.

Representativity is an important issue at *StatsSA*. In 1996 Sida's project identification consultancy reported that among the 200 professional officers, "only a handful were blacks" – with representation of women not mentioned.⁵⁹ The evaluation team learned that white women dominated the staffing profile because they had been employed for routine work in the *apartheid* period and then had risen through the ranks into middle management and higher positions. The contrast between "too many older white women" and "too few young black women and men" was a common theme at the institution. By 2000 the number of white female employees had fallen from c70 per cent to less than half, the number of black people had increased from under 15 per cent to about half and the number of black women had increased five-fold.⁶⁰ In 1999 management positions (assistant director and higher) were filled by black women – 17%; black men – 31%; white women – 24%, and white men – 28%.⁶¹ The decrease of white employees, especially women,

⁵⁸ "Gender Task Team – Final Report," nd c2000

⁵⁹ *Co-operation in the Field of Statistics between the Republic of South Africa and the Government of Sweden*, March 22, 1996, p. 21

⁶⁰ Debbie Budlender, submission to the publication, *World's Women 2000*

⁶¹ *Annual Report 1999*, Statistics South Africa, p. 4

and the increase of black women and men was not due to the intervention although it was supported by Swedish TA and reported in their progress reports. Rather, it was due to the fulfilment of obligations under the Employment Equity Act⁶² and especially to management commitment to rectifying inherited imbalances in the institution's staffing profile.

Apart from quantitative changes, as in the above examples, the evaluation team found it difficult to identify other specific types of equality changes and change processes that the interventions had set in motion or had supported. A woman member of the Poverty Alleviation and Job Creation Task Team, under *LGDSP*, said, "the councillors wonder what I did as they do not see any changes in the community. At the same time I am not in a position to initiate projects within the community."

Although the interventions did not produce significant numbers of tangible outputs that could be related to changes in unequal gender relations, there was one important intangible output that was mentioned to the evaluation team over and over again. This was the increased awareness of gender issues – whether expressed as "gender balance," or as "involving women" or as a deeper understanding of engendered needs and interests such as the fact that women and men may express different priorities regarding municipal services. Given the short period of programme implementation in all the interventions (except one, StatsSA), increased awareness represents a very important change and a process that provides a foundation for more work towards gender equality.

Increased awareness of gender equality cannot be attributed only to the effects of interventions. Parallel to implementation of interventions, there was increasing discussion of gender equality issues, in the media for example, which have made an important contribution to growing awareness. However, the interventions clearly contributed as well, in parallel with influences coming from the wider society.

"What did [gender training] mean to men? Just changing for those couple of days, after that returning to their old ways. One councillor said he did not want to know about gender issues. 'It will not happen in my house,' he said. They are not supportive of it, they just say so but not in their hearts."

– woman task team member

The evaluation team met women, associated with the interventions, who said that they had taken to heart, in a personal way, the new ideas about gender to which they had been introduced and that they now worked to change gender relations in their own lives. This is an impressive change, stimulated in particular by *LGDSP*. For

⁶² This Act sets targets to be achieved in specified periods of time for employment of black people. Women, as a previously disadvantaged group, includes all women, not further specified by race, which gender activists feel is a loop-hole in the law.

example, a former task team member said, “I use my [new] knowledge in my own household, for example I have given my daughter a car to play with rather than a doll. Gender is something that has to be thought of all hours of the day.” Men, on the other hand, were reportedly more resistant to taking gender equality issues on board in their personal lives. The reactions of another woman task team member to the issue of whether men can accept changes in unequal gender relations is given in the box.

Although such a reaction, as reported in the box, is to be expected from some men who wish to preserve their patriarchal privileges, the evaluation team nonetheless found that increased awareness of both women and men was the most important change that could be linked to the interventions.⁶³

There was evidence that gender sensitive thinking, and therefore the possibility for change in the future, has gone some way towards being institutionalised, particularly at *KCC*. Admitting that they had earlier had little awareness of and almost no knowledge about gendered needs and interests, some urban planners said they now realised that gender-relevant planning could improve their work in the future. Some, though not all, were now able, when prompted, to make a simple gender analysis within their specific planning areas. However, *KCC* does not support further promotion of these new ideas in a structured way since the interventions are now completed.

StatsSA is the only institutional partner implementing an intervention that has a permanent mechanism to promote gender equality, the Gender Unit. What changes has this Unit been able to introduce in the design of statistical instruments such as survey questionnaires? Because of the way in which the Gender Unit works, pragmatically taking advantage of opportunities as they arise – as in a survey design for example, the changes are not always very visible. They are nonetheless important. The Gender Unit has successfully introduced new questions in surveys in order to acquire better data on topics and in sectors where women’s contribution has not been visible or has been poorly counted. Better statistical information on women of all races, by comparison with men, represents a change that has strategic implications. Two examples are given in the following table.⁶⁴

⁶³ The evaluation team carried out a participatory modified Change Assessment and Scoring Tool (CAST) exercise to identify changes related to gender equality and to the Sida-supported interventions. The largest number of answers generated by the exercise had to do with increased awareness. The second largest number had to do with institutional aspects – in particular the lack of, or limited, degree to which awareness and gender equality mainstreaming had so far been institutionalised in partner organisations.

⁶⁴ Personal communication, Debbie Budlender, Statistics SA

Survey	Question	Purpose
Child Labour Survey	After listing all the people living in the household, an additional question: "Is there anyone else who normally lives with the household, e.g. an unpaid household worker?"	to ascertain how many young girls are brought from rural areas and are exploited as unpaid household workers
Labour Force Survey	In prompting for all economic activities undertaken during the previous 7 days, an additional question: "Did the person do any work as a domestic worker for a wage, salary or any payment in kind?"	because domestic service is a large employment category especially for black women, to document the presence of workers in this sector more accurately

In addition to improving the data captured in surveys, the Gender Unit has itself undertaken one survey that has strategic importance because it aims to provide policy makers with better information on the economic and social well-being of "women and men, girls and boys, rural and urban, rich and poor."⁶⁵ This is the Time Use Survey, the first such national survey in Africa and one of only a few in the developing world.⁶⁶ The Time Use Survey was designed to reveal differences in the paid and unpaid labour of women and men in all racial groups. It includes data on reproductive activities, subsistence work, casual work and work in the informal sector – all areas in which women's contribution has heretofore been unacknowledged or poorly counted and for which important indicators will now become available.

The evaluation team found some evidence that other interventions had initiated changes that addressed beneficiaries' strategic needs. One component of *TPL* was installation of high mast lights in residential areas that have high crime rates. Residents very much appreciated this output of *TPL*, men because they were not as vulnerable to attack and theft as previously, and women because the risk of rape at night was reduced. In these neighbourhoods, some women had previously been raped in their own backyards when they went to use the latrine at night, and this type of lighting was welcomed. Another change that had strategic potential was the opportunity offered in *LGDSP* for women to participate in local government activities.

The interventions produced no negative changes with regard to gender equality that could be discerned by the evaluation team. There was also no deliberate focus in any of the interventions to provide an environment in which women could work towards their own empowerment. The task teams under *LGDSP*, as has already been described, "included women" but because it was felt to be too controversial, facilitation of women's empowerment was not discussed. This opportunity can perhaps be taken up in Phase 2. Neither

⁶⁵ "Time use in South Africa," Statistics SA, draft report, 2001. The survey was funded by NORAD.

⁶⁶ *Ibid.*, p. 1 Sida does not support gender unit in Stats.

were changes in men's roles deliberately targeted in any of the interventions. Empowerment was clearly a side effect in some of the interventions, however. Some women with whom the evaluation team spoke said that they had gained in self-confidence, had acquired new skills and had grown into new roles. Although her participation in local government was not due to an intervention, a woman councillor expressed women's growing self-confidence when she said, "I never thought that one day I could stand in front of people and address them."

In summary, the Gender Unit at StatsSA has been working with survey design to improve data collected in sectors where women's contribution to the economy has not been well documented, as in domestic service. The other interventions – of much shorter duration – produced limited quantitative changes in the direction of gender equality and in any case did not carry out systematic monitoring to enable documentation of changes. The opportunity that LGDSP afforded women to participate in local government represented, for them, change with strategic potential. What was most significant was the important contribution that these interventions have made, in parallel with influences coming from the wider South African society: increased awareness of the importance, relevance and legitimacy of gender issues and equality goals.

Analysis

One could not expect to see many changes directly attributable to the interventions, given their short duration. However, the creation and strengthening of awareness of and support for gender equality is a critical change that will be important in supporting future development co-operation initiatives. Awareness building is neither a practical nor a strategic change, but it provides a foundation for both. To the degree that KCC, for example, increasingly operationalises a gender perspective in its delivery of services, women's practical needs – as for day care centres and for better access to more suitable public transport – will increasingly be met. To the degree that LGDSP Phase 2 integrates gender into poverty reduction and job creation activities at municipal level, women's strategic need for work that brings income that *they* can control the use of will increasingly be met. The interventions have made an important contribution to building a foundation of increased awareness, which is one pre-condition for changing unequal gender relations.

The way in which stakeholders understood gender equality concepts, as related to their local experience and context, provides an important point of departure for working towards changing unequal gender relations in the future. In particular, the way in which particular groups of stakeholders link gender equality to race, culture and class (and poverty issues) provides the opportunity for interventions to build concretely on locally important perceptions in the context of social diversity. To give one example. Some (mostly male) officials at KCC with whom the evaluation team spoke had a positive attitude towards the empowerment of South African women generally and to the way in which this was expressed locally – by women increasingly speaking out

in public. An intervention such as LGDSP (in its activities at KCC and other municipalities) or CUP could have supported changes in a more concrete way by developing additional supportive mechanisms. Women, who volunteered to take leadership roles at public meetings for example, could have been explicitly supported by being brought more directly into planning processes.

The evaluation team was told that the conservative environment in NCP necessitated a “cautious” approach to working with changing unequal gender relations. However, where there is evidence that large groups of stakeholders (poor black women, poor coloured male farm workers, and so on) hold strong views about their priorities, such as freedom from violence or the right to livelihoods, interventions have the opportunity to introduce gender equality concepts in such a way that they resonate with these diverse stakeholders. A “middle way” between equating gender with women (only) and homogenising approaches (“poverty affects men and women equally”) is both necessary and possible. Men, for example, can be encouraged to support change in the direction of gender equality if their practical and strategic needs, which are often different from women’s, are also addressed explicitly in interventions.

Conclusion

The foundation of heightened awareness of gender equality issues is fragile. Unless there are concrete initiatives to support continued change towards more equal gender relations, the momentum that interventions have created risks being lost. The evaluation team was told repeatedly that once the SDA post was no longer filled, there was less concrete assistance coming from the Embassy than had been the case previously. Now that two Sida-funded interventions in urban development have been completed, and without gender expertise at KCC, technical officers will not have support to develop skills to operationalise their newly found gender awareness. On the other hand, there are other on-going Sida-supported interventions at KCC and within the provincial government, where the lessons learned from the interventions studied in this evaluation could be relevant.

In LGDSP, where a foundation of more gender awareness has also been built, the opportunity exists to continue to work with individuals and teams that exhibited greater gender awareness and to translate this into concrete processes of gender mainstreaming in Phase 2 activities, especially through manual revision and training.

In order to strengthen this fragile foundation, Sida needs to be persistent and to provide support and continuity – e.g. through use of local gender consultants and networks – over a sufficiently long period of time so that opportunities, that have taken time to create, are not lost.

Chapter 8

Lessons Learned

The following lessons that were learned from the South African case study are divided into two sections: lessons specific to the South African country programme and the four interventions studied and general lessons for Swedish development co-operation with partner countries, including South Africa.

8.1 Lessons for the South African Programme

1. *Expanding the mainstreaming perspective in the CS:* The current Country Strategy links gender equality to some sectors of development co-operation and not to others. The clear link with democratic governance has supported work on gender equality in interventions in this sector, which have more explicit goals and have made some progress in mainstreaming. Similar progress could be made in other sectors and focus areas of development co-operation, if the links to gender equality were spelled out clearly in the CS. The revision of the current CS, and preparations for the next, provide an opportunity to do so. In particular, linking gender equality issues to relevant areas of economic co-operation would have long-term implications, given the intention of both partners to increase co-operation in this area.
2. *Analysis of gender and poverty links in the country programme:* The current analysis made of a general relationship between gender and poverty provides the basis for more specific future analysis. Preparation of the next CS gives an opportunity to make brief but explicit links between gender equality, sectors or themes (such as economic co-operation) and poverty reduction. Data were inadequate when the first CS was being prepared, but the situation now – though not perfect – has improved. Brief analysis of these links by the Swedish side would provide a more explicit agenda for dialogue with government partners.
3. *Sida's dialogue with the South African government:* The efforts that the Embassy is currently making to dialogue with partners (national, intervention and civil society levels) are considerable, given the work burden and time constraints that staff have. Ways of increasing and making more concrete the dialogue on specific gender equality issues, linked to poverty, to sectors and to meaningful participation strategies could be explored. Requesting the Government of South Africa to bring gender, poverty and participation experts from government to formal dialogue occasions provides one opportunity to discuss ways of supporting concrete gender-poverty-par-

ticipation linkages within the themes being considered. Discussions at these and other occasions, such as sector reviews, can be followed up and progress monitored when they are clearly minuted.

4. *Sida's dialogue with the national gender machinery and with civil society:* In addition to the dialogue that the Embassy currently conducts with civil society, and recognising the human resource constraints on the Swedish side, it is important to find ways of strengthening contacts. The evaluation team was told that the Embassy appreciates the opportunities that arise to have an informal afternoon discussion around a specific theme. Regular contact with key institutions (CGE, OSW) and with key civil society stakeholders could perhaps be made through occasional afternoon meetings. The agenda/topics could include, among others, developing a gender mainstreaming perspective in sectors/areas such as economic co-operation and the private sector.
5. *Integration of a gender perspective in new programmes:* Good opportunities to include a gender perspective in programmes now in their initial stages exist and should be utilised. One example is the new Budget Poverty Reduction Project with the Department of Finance in which South Africa's international expertise in gender budgeting could be investigated to determine whether this would add value to the initiative. Another example is the new focus on HIV/AIDS in which a gender perspective on HIV transmission and the gendered impact of AIDS is vital.
6. *Working with gender equality in the South African context:* The evaluation findings showed that *locally important meanings* of gender equality vary but that, for those who previously suffered social exclusion, gender inequalities are linked with race and class. This is an important lesson that should be taken into consideration in the design of new programmes. Culturally important attributes of equality, exemplified by the importance of *respect, dignity* and *tolerance* in the South African case, should influence the way in which Sida discusses the gender equality goal with its partners.

The conservatism of NCP influenced the way that gender goals were introduced and interpreted in interventions. The evaluation findings showed that many key stakeholders (national and local government institutions for example) are able to go beyond a conservative interpretation of the gender equality goal (gender balance) and to reflect on *South Africa's national goals* (gender equality and women's empowerment). These national goals and South Africa's international commitments (e.g. the Beijing Platform of Action) give an opportunity for Sida to work with interventions on gender equality goals that go "beyond numbers."

There is increasing interest and work in South Africa on *men's roles* in relation to gender equality.⁶⁷ There are opportunities for interventions – current and planned – to begin to incorporate systematic attention to men's needs and priorities as well as women's.

⁶⁷ See Annex 4, Men and Male Roles in Post-Apartheid South Africa.

7. *Mainstreaming lessons:* The main lesson learned from the interventions studied was that mainstreaming is taking place, albeit in an embryonic way and with some mainstreaming elements present and others absent in any particular intervention. It is important to build on the experiences that have been obtained.

These experiences show that more substantial *gender analysis* (of inequalities between women and men in the sector, linked to poverty) will improve the effects of the intervention on those who are intended to benefit. Improving gender analysis capabilities can be linked with LFA in programme design.

The interventions did not have access to *sex-disaggregated and gender-relevant statistics*. One lesson learned from the evaluations studied in NCP is that a gender analysis based on locally available data would have made mainstreaming efforts more focused. Such data are becoming increasingly available and can be used in the context of gender analysis in planning new interventions. Linking interventions to provincial statistical offices is also one way of supporting the development of gender analysis capacity of statistics staff.

Gender training was identified as an important mainstreaming component in several of the interventions studied. Training contributed to increased awareness of equality issues and therefore heightened the potential for change. The lessons learned from intervention experiences show that continued training should be supported, made as specific to intervention issues as possible and optimised by being followed up with further training. National gender/poverty expertise as well as use of locally produced guidelines⁶⁸ and mainstreaming tools can increase the relevance of training. Dialogue with national gender and poverty experts can assist to identify local gender training expertise and useful South African guides. Some Sida handbooks may be useful in specific interventions.⁶⁹

Monitoring: None of the interventions studied monitored the effects and impacts of activities. To support further development of mainstreaming capability, Sida can work with the planning of new interventions on clarity of gender equality goals and objectives, realistic targets and indicators and supporting development of gender-sensitive monitoring systems.

8. *Application of lessons learned by interventions:* The evaluation identified specific lessons from the interventions studied that have immediate applicability.

The lessons from working in NCP, such as the gender-race-poverty dynamic, have relevance for other Sida-supported provincial interventions.

⁶⁸ For example, *Report on Gender, Poverty and Integrated Urban Planning in South African Municipal Practice*, by Josette Cole and Susan Parnell, Department of Provincial and Local Government, April 2000

⁶⁹ For example, *Gender in the City – Guidelines for Mainstreaming Gender in Urban Development Planning: a South African Experience*, draft by Lotta Sylwander (Sida), n.d.

LGDSP can build on experiences gained in working with gender mainstreaming and poverty alleviation (treated largely as separate issues) to create links between these in the second phase.

The lessons from KCC, on gender perspectives in participatory processes and working to include different stakeholders' needs and priorities in municipal service delivery, are relevant to other Sida-supported urban development interventions. An exchange visit between KCC urban planners and their counterparts in Buffalo City (formerly King William's Town) could both stimulate KCC officers to continue their work and would assist to transfer practical lessons to their colleagues.

9. *Synergies between gender equality and poverty:* The evaluation findings demonstrated that a foundation has been built in the interventions to make more explicit links between poverty reduction and gender equality in the future. The way in which poor urban women whom the evaluation team met were able to articulate these links clearly demonstrates that it is possible to go beyond general statements and build on the perceptions of deprivation of particular primary stakeholder groups. There is opportunity in South Africa to demystify the ways in which gender equality and poverty are mutually interlinked by building on local experiences.

The findings from the evaluation showed that one area in which synergies between gender equality and poverty are clearly linked is through service delivery by local governments to their residents. The evaluation team encountered disappointed expectations that Sida supported the production of "intangibles" – comprehensive urban plans, for example, and not provision of the services that women and men say they desperately need such as jobs. There is scope, however, within the current or planned expansion of programmes to address women's and men's (often differentiated) *practical gender needs*. LGDSP Phase 2 can be designed and implemented so that a gendered perspective in municipal service delivery is brought out clearly. The urban development programme in Buffalo City can benefit from the lessons that were learned in CUP, Kimberley – such as the importance of hearing from women and men about their needs and priorities – to reinforce a socially differentiated and gender sensitive perspective in the planning of urban services delivery.

10. *Stakeholder participation:* If primary stakeholders' views on gender and poverty are to have relevance, interventions need to build on the experiences already obtained in promoting participatory processes. The evaluation findings showed that much of the effort to promote participation focused on information sharing and consultation. The intention to give people a voice in determining their own development through more representative participation appeared in planning documents but was largely not realised. The lesson learned is the need for strategies to capacitate and maximise the potential and experience that local groups provide. This potential probably requires the use of local experts who have practical hands-on experience in building capacity to facilitate primary stakeholders to

become meaningful participants in activities that will impact on them. Because of the long history of exclusion of most South Africans from having a voice in their own development, key stakeholders such as donors and implementing agencies must accept the need for a cautious approach to participation, one that will likely take time and resources to nurture.

The level of Stakeholder participation can be described as follows. Consultative (3) for Statistics SA ; Information giving (2) and functional representation (5) for LGDSP; Information Giving (2) and Consulting (3) for CUP; Information giving (2) and Material Incentives (4) for TPL. The relative participatory mechanisms were respectively, the Provincial Statistical Forum, Consultation with civil society, task team and surveys, Public Participation Process, Community meetings and labour intensive work. The types of participation identified in the interventions included some attention to gender issues. Some interventions integrated gender equality into participatory mechanisms through representation and participation of women and men – in task teams, at meetings and so on. For some implementers, the realisation that women’s voices were important because they had their own priorities was an eye opener. “I would never have learned to listen with ‘gender-sensitive ears’ if it hadn’t been for CUP;” said one white male urban planner. KCC officials said that they had come to realise, in retrospect, that meetings could have been better timed to suit the diverse needs of community members. Rather than working entirely through wards, they now saw the necessity of getting all people involved, “including at street level.” And they had discovered that they should have analysed the responses of women and men to various urban planning issues collected during the PPP and reflected these in the Plan. Such learning experiences provide an important basis for taking participatory processes forward.

8.2 Lessons for Swedish Development Co-operation

11. *Gender equality goal:* The findings from South Africa showed that making gender equality a strategic priority in the CS and following through with incorporation of gender equality goals in interventions produced results. Sida’s gender equality goal has made a difference.

The priority given to gender equality in development co-operation in South Africa is related to the momentum created at Sida by work on its *Action Programme for promoting equality between women and men in partner countries*. The evaluation team learned from discussions at Sida that, although some of this early momentum has now dissipated, there is still *great will and commitment to the goal*. Sida’s commitment to gender equality should be strengthened, even as Sweden’s policies on development co-operation change.

It was clear to the evaluation team that one reason for loss of momentum is that Sida programme officers find it difficult in practice to work with all Sida's development co-operation goals and Action Programmes. There is an advantage to linking gender equality to other development co-operation goals, as this will facilitate identification of synergies. At the same time, it is important that the *visibility of the gender equality goal* is maintained. Much of the progress already achieved risks being lost – or built on further – if gender equality is linked only to poverty, or only to human rights, or to any other cross-cutting theme. The risk here is that gender equality will come to be seen as linked to only one cross-cutting theme, not all. A second risk is that it can easily be taken for granted that “gender equality is automatically included” when the specific links are not made visible.

12. *“Women”*: The South African findings showed that there is still a tendency by diverse stakeholders to equate gender equality with promoting women's participation, in isolation of the context of gender inequalities. More rigorous scrutiny by Sida of project proposals and programme designs of planned interventions could support gender equality in development thinking, rather than a narrow focus on women's participation.
13. *Mainstreaming strategy*: The South African findings showed that many stakeholders (Embassy, implementing partners) *are* increasingly working with mainstreaming components and elements, albeit it in an eclectic way using some elements (gender training) and with limited attention to others (gender analysis). Mainstreaming has been on the international and Swedish agenda for a relatively short period, and the evaluation findings give cause for optimism. Mainstreaming should continue to be supported, not just in new interventions but in on-going ones where there is potential to support incorporation of mainstreaming elements.
14. Sida's gender equality goal and mainstreaming strategy have *resource implications*. In interventions where there is a clear rationale for gender equality mainstreaming (that addressing gender inequalities will improve the intervention and promote positive change), adequate funding to support this is necessary – whether for training (of TA, at intervention level, etc.), delivery of national gender equality advisory services, development of a gender-sensitive monitoring system, etc.
15. *Accountability*: Mainstreaming will be further promoted by more rigorous accountability required from programme implementers. Accountability mechanisms can be included in programme designs and requested in reporting. For example, the progress reports from one intervention in South Africa contain updates on changes in racial and gender representativity in the staffing profile but say nothing about the interesting work taking place to engender statistical surveys and what the intervention is doing to support this. Accountability is especially necessary in TORs and contracts of *consultants/TA* who manage interventions on Sida's behalf. When accountability requirements are written into contracts, the monitoring work of Embassy staff is made easier.

16. *Gender skills and expertise:* Working with gender equality goals and mainstreaming is the responsibility of all Sida programme officers. The South African findings showed that their gender skills, acquired from Sida's training or through experience, are enhanced when there is professional gender expertise available, both to the Embassy and to the interventions. This lesson has resource implications. If it is not possible to have a staff position for a gender expert at an Embassy, such expertise can be budgeted for specific tasks, such as working with a partner organisation on a project proposal, participating in a sector review, etc.

Annex 1

Terms of Reference

1. Background

Equality between women and men is now firmly placed on the inter-national agenda after the United Nations Fourth World Conference on Women in Beijing in 1995. The *Beijing Platform for Action* adopted at the Conference clearly recognises that gender equality and women's empowerment are essential for addressing the central development concerns of poverty and insecurity and for achieving sustainable, people-centred development. This recognition is also reflected in development policies of bilateral donors and international agencies as well as of partner countries in the south.

In May 1996 the Swedish Parliament established the *promotion of equality between women and men in partner countries* as a goal for development cooperation between Sweden and partner countries. The focus on equality between women and men is based on two important premises: firstly that equality is a matter of human rights; and secondly that equality is a precondition for effective and sustainable people-centred development.

Gender equality may be defined as *equal rights, opportunities and obligations* of women and men and an increased potential for both women and men to *influence, participate in and benefit from* development processes.¹ Through this definition, stakeholder participation is given a central role in all efforts to promote gender equality. Consequently, it will also play an important role in the evaluation outlined below.

In June 1996, the Swedish government established guidelines for promoting gender equality in Swedish international development cooperation. These guidelines form the basis for Sida's Action Programme for promoting gender equality, which was adopted in April 1997. The Action Programme comprises a policy, an experience analysis and an action plan. It covers a five year period, 1997–2001. The Action Programme *emphasizes the importance of understanding and affecting the structural causes of gender inequalities*, particularly those related to economic decision-making and economic independence; representation in political decision-making and management; and human rights.

The Action Programme focuses on a '*mainstreaming*' strategy for working towards the gender equality goal. This strategy aims to situate gender equality

¹ Sida's Action Programme for promoting equality between women and men in partner countries, Sida, April 1997

issues at the centre of broad policy decisions, institutional structures and resource allocations about

development goals and processes. Mainstreaming implies that attention to the conditions and relative situations of different categories of women and men, boys and girls should pervade all development policies, strategies and interventions.² Analyses of their respective roles, responsibilities, access to and control over resources and decision-making processes, needs and potentials, was clearly established in the Platform for Action as the first important step in a mainstreaming approach. The evaluation outlined below will assess whether some kind of systematic *gender analysis*³ has been done and has been allowed to influence the intervention, either initially during design or later during implementation and follow-up. Has a mainstreaming strategy formed part of the factors that influence results with regard to the promotion of gender equality⁴? What other factors may be distinguished as important for results?

Mainstreamed interventions are to be combined with *dialogue and consultations* between Sweden and partner countries. In, for example, the country strategy process⁵ and in annual negotiations on specific sector programmes, equality between women and men should be taken up as an integral part of discussions on national development. The dialogue should be utilized to come to agreement on the appropriate goals, targets and indicators of progress for promoting equality between women and men at national level in Sida's country strategy process and within the context of individual projects and programmes.

2. Reasons for the evaluation

Sida has previously commissioned studies that assess how and to what extent gender equality and poverty issues are treated in country strategy documents and evaluation reports.⁶ The value added from this evaluation is that it goes

² All personnel working with development cooperation are expected to have the basic competence to promote equality between women and men in relation to whatever issues they are working on and to recognize when there is a need for expert competence.

³ Gender analysis: Please see Action Programme page 6 and Making a difference – gender equality in bilateral development cooperation, Sida, December 1998, pages 45–47.

⁴ Selection criteria for interventions to be assessed in the evaluation, please see page 5 in this ToR.

⁵ The Country Strategy is the most important instrument governing Sweden's development cooperation with a country. Normally, a new country strategy process for each country is started every third year. The background material for a strategy is a Country Analysis and a Result Analysis. The country strategy is operationalized in a Country Plan that outlines the activities that Sweden will be involved in during the entire strategy period. Please see Sida at Work Sida's methods for development cooperation for more information on the country strategy process, Sida, 1998, pages 31–40.

⁶ Sida Studies in Evaluation 97/2: Poverty Reduction and Gender Equality – An assessment of Sida's country reports and evaluations in 1995–96, Eva Tobisson and Stefan de Vylder.

Sida Studies in Evaluation 98/3: Evaluating Gender Equality – Policy and Practice – An assessment of Sida's evaluations in 1997–1998, Lennart Peck.

En Studie av jämställdhet i tio av Sidas landanalyser och landstrategier, Jessica Pellerud, 2000.

beyond analyzing documents and reports to assess, as far as possible, the changes with regard to gender equality that interventions may have contributed to. As Sida's Action Programme for promoting gender equality will be revised during 2001, it is important to gain more knowledge about the results and lessons of the efforts to promote gender equality in development cooperation.

3. Purpose and scope of the evaluation

The purpose of the evaluation is:

- To assess how Sida's mainstreaming strategy is reflected in the country strategy process, i.e.
 - to assess the quality of the gender analysis in the country strategy process;
 - to assess if and how gender equality is promoted in the dialogue with the partner country during the process.
- To assess the strategic and/or practical changes with regard to the promotion of gender equality⁷ that interventions supported by Sida have contributed or may contribute to.
- To provide an input to a deeper understanding of the concrete meaning of the following concepts in interventions supported by Sida: gender equality, empowerment of women, stakeholder participation, strategic and practical changes with regard to gender equality and mainstreaming.

Users of the lessons learned in the evaluation outlined here are Sida staff in Stockholm and in the countries involved. Lessons learned will also be of interest to other stakeholders in partner countries. The evaluation process should be designed so that both Sida staff and stakeholders in partner countries receive feedback on evaluation results.

⁷ Strategic changes with regard to gender equality relates to strategic gender interests/needs. They imply changes in economic, political and/or legal structures or frameworks at local and/or national levels so that equality between the sexes is promoted. Changes of this kind challenge the prevailing power relations between females and males.

Practical changes with regard to gender equality relates to practical gender interests/needs. They are reflected in the reduction of gender disparities in basic subsistence and service provisioning e.g. in health status and access to health care, levels of education and access to information, access to food and livelihood security, etc. Practical interests/needs do not directly challenge the prevailing distribution of labour. They are experienced by women and men within their traditionally accepted roles in society. Based on definitions in *Striking a balance – On women and men in development cooperation*, Sida, 1999, page 11.

4. Methods

4.1 Case studies

Case studies will be undertaken at country and intervention level. The Consultants are not specifically requested to make any linkages between these two levels.

At the country level, the Swedish support to three countries are selected as case studies, South Africa, Nicaragua and Bangladesh. These cases are to provide information about how Sida's mainstreaming strategy is reflected in analyses and dialogue during the country strategy process. The cases are selected for the following reasons:

- they represent different regions where Sida is active as a donor;
- the countries have adopted the Beijing Platform for Action;
- the countries have ratified the CEDAW, the Convention on the Elimination of All Forms of Discrimination against Women (Bangladesh with reservations);
- a country strategy process has been started and completed after June 1996;
- gender equality issues are included in the goals and direction of the Country Strategy;
- gender equality objectives are included in the agreements on development cooperation.

At the intervention level, Sida has selected a four interventions in South Africa and Nicaragua respectively. These are listed in Annex 1. Selection criteria are listed below.

Interventions that meet one or both of the following criteria:

- where gender equality has been 'mainstreamed' either initially during design or later during implementation;
- that may have contributed to practical or strategic changes with regard to gender equality (an alternative where 'mainstreamed interventions' has not been a possible selection criteria);

Interventions that meet all three of the following criteria:

- with potential to provide lessons for Sida's support to promote gender equality;
- where a new agreement has been signed after June 1996;
- representing 3–4 sectors where Sida is involved as a donor.

As concerns Bangladesh, the Embassy of Sweden is carrying out a study looking at how the gender equality perspective has been guiding when planning interventions during 1997–2000. The Consultants are to use this study

for the selection of 1–2 interventions to assess. The Consultants are to apply the selection criteria above that is applicable. Sida is to approve of the selections made.

Within the framework of the interventions selected, the Consultants are to identify interesting study objects and elaborate on these choices in their inception report.

4.2 Stakeholder participation

Concepts such as gender equality and women's empowerment are broadly defined (please see annex 2) in Sida's Action Programme. These concepts may have been understood and implemented in various ways in different contexts. Furthermore, progress towards equality and empowerment may be realized at two main levels, at the level of the individual and in a wider sense at structural levels involving change for categories of individuals or groups. Consequently, stakeholder participation is crucial for the realization of this evaluation.

Stakeholder participation is to take the form of active consultation with female and male stakeholder groups within the partner countries, such as beneficiaries, project implementors, ministry officials etc. and stakeholder groups within Sida and the various Swedish Embassies. It is important to combine methods such as focus group discussions with individual interviews and to crosscheck analyses with stakeholders.

4.3 Gender disaggregated data

Needless to say, all information in the evaluation report should be gender disaggregated.

5. The assignment

This section of the Terms of Reference will consist of three different parts following the 'Purpose and scope' of the evaluation.

5.1 How Sida's mainstreaming strategy is reflected in the country strategy process

The Consultants are to analyse the country strategy process documentation and interview stakeholders.

5.1.1 *The quality of the gender analysis in the country strategy process*

- Has a gender analysis preceded or been integrated into the background material for the Country Strategy (Country Analysis and Result Analysis)? Does the Country Strategy document itself reflect such analysis with respect to gender? In other words, is the Country Strategy 'mainstreamed'?

- Does the gender analysis take into consideration and reflect the following issues about the local context when it comes to gender equality:
 - the strategic and practical interests/needs prioritized by the national government;
 - the strategic and practical interests/needs prioritized by major NGOs and/or other civil society institutions;
 - constraints and problems in addressing these interests/needs;
 - ways to address these constraints and problems;
 - participation by women and men, girls and boys in addressing these interests/needs;
 - other important factors in the local context?
- To what extent are the gender equality priority areas in the Country Strategy guided by the priority areas raised in Sida's Action Programme; and the priority areas raised in Sida's Special Handbooks for mainstreaming gender perspectives into different sectors? Specifically, do the gender equality priority areas in the Country Strategy reflect the emphasis on strategic gender interests in the Action Programme? Does the analysis in the Country Strategy reflect the gender equality approach in the Action Programme or does it reflect a 'Women in Development approach'⁸?
- Is it possible to see any links/synergies and/or conflicts in the country strategy process between the gender equality goal and the other goals of Swedish development cooperation, particularly the overall goal of poverty reduction?⁹

5.1.2 Dialogue during the country strategy process

- How were negotiations with the partner country conducted with regard to gender equality? Was there a dialogue between the governments on issues of gender equality? What issues were raised in the dialogue?

5.1.3 How are gender analyses and dialogue reflected in key documents and agreements?

- Do the Country Plan and the Agreement on development cooperation between Sweden and the partner country in question reflect the gender equality concerns expressed in the Country Analysis and Country Strategy? Do the Country Plan and Agreement reflect the gender equality issues raised in the dialogue between the two governments? Are there ob-

⁸ Please see page 24–25 from *Evaluating Gender Equality and Women's Empowerment – A DAC Review of Agency Experiences 1993–1998*, Prudence Woodford-Berger, 1999

⁹ The overall goal of Swedish international development cooperation is poverty reduction. To provide guidance for Sweden's contributions to the reduction of poverty, the Swedish Parliament has laid down six goals for Swedish international development cooperation: economic growth; economic and social equality; economic and political independence; democratic development; environmental care; and gender equality.

jectives and/or indicators for what to achieve when it comes to gender equality? That is, is the content in the Country Plan and the Agreement on development cooperation between Sweden and the partner country in question ‘mainstreamed’?

5.2 Strategic and practical changes with regard to the promotion of gender equality

The Consultants analyses are to be based on interviews with stakeholders and analysis of country and project documentation. Given the difficulties in measuring and assessing strategic and practical changes with regard to gender equality, it is crucial that the Consultants work in an analytical way and in the evaluation report discuss challenges regarding methods that will arise. The Consultants are to have close contacts with Sida during this part of the evaluation assignment.

5.2.1 Stakeholder analysis for the evaluation

In order to define what stakeholder groups that are to be consulted during the evaluation, the consultants are to carry out a stakeholder analysis. The Consultants are first to establish what primary and secondary stakeholder groups that have been identified in the project documentation for each intervention and their composition as regards sex and other key factors. With this as a point of departure, the Consultants are to further elaborate this stakeholder analysis, if deemed necessary.

5.2.2 Objectives and indicators of progress towards gender equality in interventions

The concept of gender equality tends to be loaded with values and take different meanings in different contexts and even for different individuals. Further, promoting gender equality involves promoting a process of change and change may be elusive to capture in indicators. Consequently, the objectives and indicators of gender equality in interventions need to be context specific. The first step in identifying context specific objectives and indicators is to establish what objectives and indicators that are defined in project documentation. Secondly, the Consultants are to select and interview representatives of primary and secondary stakeholders in the intervention. If there are strong diverging opinions among stakeholders during the interviews on objectives/indicators these should be accounted for and form part of the analysis of strategic and practical changes with regard to gender equality. The second step, interviewing stakeholders, will become even more important if the objectives/indicators in project documentation are not specific enough to use when carrying out the evaluation.

5.2.3 Strategic and practical changes with regard to the promotion of gender equality

- The Consultants are to assess the strategic and/or practical changes with regard to the promotion of gender equality that the interventions selected for this evaluation have contributed or may contribute to. If practical

changes are identified, the Consultants are to discuss whether these may lead to strategic changes.

What activities have been performed within the framework of the intervention? What are their immediate intended or unintended effects with regard to gender equality? What are their immediate positive and negative effects on gender equality? If there has been immediate effects on gender equality, what may be said today about whether the effects may be lasting?

- A complex interplay of various factors influence the degree to which gender equality is promoted in interventions: factors in the *societal context* and in the *sector* of the intervention (e.g. health) together with factors that have to do with the *implementation and organisation* of the intervention and the roles of various *female and male stakeholders* in this implementation and organisation. These last two factors are specifically important to assess. The Consultants are to discuss what may have caused or may contribute to promoting effects on gender equality. What factors have been of importance for promoting gender equality and/or impeding the promotion of gender equality? Why?
- What has been the role of different stakeholder groups in influencing the promotion of gender equality? Have they played an active or passive role? Specifically, what has Sida's role been in influencing gender equality in the interventions? Has Sida raised the gender equality issue in discussions with cooperating partners? Has Sida played an active or passive role?
- What analysis of the gender equality aspects of the intervention is carried out in Sida's Assessment Memorandum? When assessing the quality of the gender analysis consider the same issues as in section 5.1.1. Is it possible to say anything about the relationship between the quality of the gender analysis in the Memorandum and how gender equality issues are integrated in the intervention?
- Is it possible to see any links/synergies and/or conflicts in the intervention between the gender equality goal and the other goals of Swedish development cooperation, particularly the overall goal of poverty reduction?
- In the case of Bangladesh, an intervention selected for this evaluation *may* be a Sector Programme Support (please see Annex 1). Should this be the case, the Consultants are to assess *Sida's* position and role when it comes to mainstreaming gender equality in the design process for the Programme – potentials, problems and lessons. The Consultants are *not* to assess results of the Programme.

5.2.4 Understanding concepts

The Consultants are to discuss the concrete meaning of the following concepts in the selected interventions: gender equality, empowerment of women, stakeholder participation, strategic and practical gender equality effects and mainstreaming. How the concepts are understood and implemented by pri-

mary stakeholders may serve as an input towards a deeper understanding of the concrete meaning these concepts may take in Sida supported interventions.

5.3 Conclusions and lessons for development cooperation

The Consultants are to discuss lessons for Sida and for partners involved in the interventions on how to strengthen support to promoting gender equality, i.e. lessons about:

- how to strengthen the gender analysis and dialogue in the country strategy process and in interventions;
- factors that have been of importance in influencing change towards gender equality, what has worked well/not so well and why;
- problems and possibilities when using measures/indicators of progress towards gender equality;
- the concrete meaning of the following concepts in interventions supported by Sida: gender equality, empowerment of women, stakeholder participation, strategic and practical gender equality effects and mainstreaming;
- implications for the interventions assessed on how to improve their work for promoting gender equality;
- implications for the revision of Sida's Action Programme for the promotion of gender equality.

6 Competence

The evaluation is to be carried out by a team with advanced knowledge of and experience in:

- gender analysis
- anthropology or similar human or behavioural social science;
- participatory evaluation methods in field situations;
- local context in Bangladesh, South Africa and Nicaragua (probably links with local consultants)
- gender equality issues in the following sectors: education, health, democratic governance, urban development.

The team leader is to have documented experience in the management of evaluations.

At least one team member must speak Spanish and one team member must have the ability to read Swedish.

7 Work plan

The study is envisaged to require an estimated 90–100 person weeks.

The tentative time schedule for the study is:

August/September 2000	Tender invitation
December/January 2001	Inception report (discussions with Sida), including analysis of country and project documentation for the selection of “study objects” – please see ToR 8. Reporting
January/May 2001	Field work (+seminars in partner countries)
May/June 2001	Draft country reports (+seminars at Sida)
August 2001	First draft synthesis report (+seminars at Sida)
September/October 2001	Final reports

8 Reporting

The Consultants are to submit the following reports to Sida:

1. An *inception report* commenting and interpreting the Terms of Reference and providing details of approach and methods for data collection and analyses. Country and project documentation are also to be analysed in order to identify interesting study objects within the framework of the interventions selected for this evaluation. The inception report shall include a work plan specifying how and when the work is to be performed.
2. Three *draft ‘country reports’* summarizing for each country the findings both on the country strategy process and the interventions selected as case studies, as specified in the ToR 5.3 Conclusions and lessons for development cooperation.
3. A *draft synthesis report* in English summarizing the findings, as specified in the ToR 5.3 Conclusions and lessons for development cooperation. Format and outline of the report shall be agreed upon between the Consultants and Sida. The report shall be kept rather short (60–80 pages excluding annexes). More detailed discussions are to be left to annexes.
4. Within three weeks after receiving Sida’s comments on the draft report, a *final version* in two copies and on diskette shall be submitted to Sida. When the report has been approved by Sida it should be *translated into Spanish*, so that it is available both in English and Spanish. Subject to decision by Sida, the report will be published and distributed as a publication within the Sida Evaluations series. The evaluation report shall be written in Word 6.0 for Windows (or in a compatible format) and should be presented in a way that enables publication without further editing.

The evaluation assignment also includes the production of a Newsletter summary following the guidelines in *Sida Evaluations Newsletter – Guidelines for Evaluation Managers and Consultants* (Annex 3) and also the completion of *Sida Evaluations Data Work Sheet* (Annex 4). The separate summary and a completed Data Work Sheet shall be submitted to Sida along with the final report.

Consultation and dissemination of emerging findings and lessons will be important throughout the study (please see ToR 7. Work Plan) and the Consultants are to include a budget for this in their tender. However, dissemination activities following the publication of the evaluation report will be covered by a separate budget and contract between the Consultants and Sida. A decision on dissemination activities will be taken at a later stage in the evaluation process.

Annex 1: List of interventions selected as case studies

Nicaragua

Urban development, Prodel – Program for local development
Health sector, Prosilais – Integrated local health systems
Democratic governance – Academia de Policia
Democratic governance – Atlantic Coast, Regional and local authorities

South Africa

Urban development, CUP – Comprehensive Urban Plan, Kimberley
Urban development, TPL – Trees Paving & Lighting, Kimberley
Democratic governance, Local authorities, Northern Cape Province
Democratic governance, StatsSA – Statistics Sweden

Bangladesh

The Embassy of Sweden in Bangladesh is carrying out a study looking at how the gender equality perspective has been guiding when planning interventions during 1997–2000. The Consultants are to use this study for the selection of 1–2 interventions to assess. Sida is to approve of the selections made.

Within the framework of the interventions above the Consultants are to identify interesting study objects and elaborate on these choices in their inception report.

Annex 2: Broad definitions

Gender equality: Equal rights, opportunities and obligations of women and men and an increased potential for both women and men to influence, participate in and benefit from development processes¹⁰.

Empowerment of women: Women gaining increased power and control over their own lives. It involves awareness-raising, building self-confidence, expansion of choices, and increased access to and control over resources.¹¹

Stakeholder participation: A process whereby those with rights and/or interests play an active role in decision-making and in the consequent activities which affect them¹². From any stakeholder's perspective there are a number of possibilities for participation. One stakeholder may inform other stakeholders, consult them or actually be in partnership (equal powers of decision-making) with one or more of the other stakeholders.

Sida has initiated a project to develop guidelines for the organization on participatory methods. It is expected that a definition and discussion on stakeholder participation will be available during September/October 2000.

Strategic changes with regard to gender equality relates to strategic gender interests/needs. They imply changes in economic, political and/or legal structures or frameworks at local and/or national levels so that equality between the sexes is promoted. Changes of this kind challenge the prevailing power relations between females and males.

Practical changes with regard to gender equality relates to practical gender interests/needs. They are reflected in the reduction of gender disparities in basic subsistence and service provisioning e.g. in health status and access to health care, levels of education and access to information, access to food and livelihood security, etc.

Practical interests/needs do not *directly* challenge the prevailing distribution of labour. They are experienced by women and men within their traditionally accepted roles in society.¹³

The strategy for working towards the goals and achieving the effects mentioned above is *mainstreaming*. The first important step in a mainstreaming approach is an analysis of the situation of women and men, boys and girls, i.e. analysis of the roles, responsibilities, access to and control over resources and decision-making processes, needs and potentials of women and men, boys and girls (gender analysis).

¹⁰ Sida's Action Programme for promoting equality between women and men in partner countries, Sida, April 1997.

¹¹ Sida's Action Programme

¹² Stakeholder Participation and Analysis, ODA, 1995

¹³ Based on definitions in Striking a balance – On women and men in development cooperation, Sida, 1999, page 11.

Annex 2

Stakeholder Analyses

Types of Stakeholders:

Primary = directly or ultimately affected, positively or negatively

Secondary = intermediaries such as implementing organisations and funders

Key = either primary or secondary stakeholders who can significantly influence the intervention, positively or negatively, and who share responsibility for sustainability of ultimate effects

STATISTICS SOUTH AFRICA				
Stakeholder	Primary	Secondary	Key	Type of Interest
StatsSA headquarters management		√	√	Implementer
StatsSA headquarters Gender Unit		√		Producer of gender-relevant statistics; recipient of Norwegian assistance
StatsSA provincial office, Kimberley	√			Dependent on directives from headquarters; no authority to act independently
Statistics Sweden Stockholm ¹⁴		√	√	Implementer; transfer of skills & knowledge
Sida/Headquarters, Stockholm		√	√	Programme approval & funding, against agency policy criteria
Sida/Embassy, Pretoria		√	√	Monitoring
Users of gender-relevant statistics, national	√			Need relevant statistics to support their work
Users of gender-relevant statistics, provincial	√			Need relevant statistics to support their work

LOCAL GOVERNMENT DEVELOPMENT SUPPORT PROGRAM				
Stakeholder	Primary	Secondary	Key	Type of Interest
Sida/Headquarters, Stockholm		√	√	Programme approval & funding Contacting Consultants
Sida/Embassy, Pretoria (+ SD adviser)		√	√	Monitoring Consultants SD implementer in transfer of skills and knowledge
Provincial Level: Department of Housing and Local Government				
Consultants (SALA, SIPU) and programme manager		√	√	Design and development of program Financial Implementer; transfer of skills and knowledge Monitoring
Steering Committee (+ Program manager)		√	√	Political will and interest Approval of Task Team reports
Provincial Task Team • Gender, Poverty and Children's Issues Task Team (+ assistant of Program manager)		√	√	Political interest Implementer; transfer of skills & knowledge Responsible for mainstreaming gender, poverty alleviation and children's issues in the 7 municipal-based task teams
Municipal Level: 7 different municipalities				
7 municipal-based Task Teams, including: • Gender Mainstreaming TT (Kimberley) • Poverty Alleviation & Job Creation TT (Garies) • Children's TT (Calvinia)	(√)	√	√	Directly affected as beneficiaries of LGDSP & at the same time implementers: Political interest Identification of community needs Design of activities relevant to their theme on the basis of community needs assessment Development of Training Manuals for Phase II of LGDSP
Community Level				
Citizens	√		(√)	Participation (intended as key stakeholders in the design, but this did not materialise)

COMPREHENSIVE URBAN PLAN				
Stakeholder	Primary	Secondary	Key	Type of Interest
Kimberley City Council – Political management – Technical management		√	√	Political Technical
Sida-Headquarters Sida-Embassy, Pretoria		√ √	√ √	Development cooperation, funding Transfer of skills, gender training, monitoring
Consultants (Hifab and others)		√	√	Development & design of activities and plans Transfer of planning skills Financial – contract
Population of Kimberley ¹⁵	√		(√)	Improvement of living conditions Having a voice
Residents of targeted areas ¹⁵	√		(√)	Participation and having a voice Improvement of living conditions

TREES, PAVING AND LIGHTING				
Stakeholder	Primary	Secondary	Key	Type of Interest
Sida headquarters		√	√	Programme funders Political credibility
Sida / Embassy in Pretoria		√	√	Advisors / monitors Gender training
Kimberley City Council: – Officials – Councillors (politicians)		√ √	√ √	Receiving funds Implementers Delivery of services Build credibility in their wards by delivering jobs & services
Consultants – Trees for Africa		√		Transfer of skills & knowledge through publicity campaign; financial interest
Workers from the community	√			Employment opportunities
The general community in project neighbourhoods ¹⁶	√		(√)	Improvement of environment To be consulted / participate

¹⁵ Both “population of Kimberley” and “residents of targeted areas” were intended, in the planning of the programme, to be able to influence the design of the Comprehensive Urban Plan. Both are ticked as key stakeholders, but in brackets, to mean that the intention was not followed through, in practice.

¹⁶ The “general community in project neighbourhoods” was intended, in the planning of the project, to be able to influence its design and implementation. This is ticked as a key stakeholder, but in brackets, to mean that the intention was not followed through, in practice.

Annex 3

Analytical Frameworks and Study Objects

ANALYTICAL FRAME WORK III – for understanding gender mainstreaming at country strategy level

	Study Objects	Country Strategy Level: Key Evaluation Questions
WHAT?	<ul style="list-style-type: none"> • Gender Equality goal outlined in Country Strategy • Gender Equality goal influenced choice of interventions • Gender/poverty links addressed 	<ul style="list-style-type: none"> - How concrete, focused are g/e goals? Strategy stated? Effects to be measured? - g/e goals specific to SA realities? To specific sectors, topics (AIDS, violence)? - Choice of interventions & activities within them influenced by g/e goals? - In what specific ways were g/e and poverty goals addressed? Linked? - How does the CS "fit" on the gender mainstreaming scale? - Influence of Min/FA, Stockholm, and Sida HQs on g/e in the CS? - g/e included in current review of the CS & preparations for the next CS? Effects of the CS/ interventions on gender inequalities to be examined?
HOW?	<ul style="list-style-type: none"> • Dialogue: Government counterparts, Sida HQ and field offices, Ministry for Foreign Affairs, g/e advocates, civic society representatives • Information analysis: country-specific national commitments • Evaluation of past experience: results analysis • Expertise: Sida HQ and field offices, local, sector specific 	<ul style="list-style-type: none"> - Who are key national g/e dialogue partners? How is dialogue with them conducted? - How was Sida's g/e goal/Action Plan explained to Depty/Finance & other partners? How were SA's national g/e goals addressed? Discussion general or focused/concrete? - Who sets the Agenda for Annual Negotiations? Any directive to include g/e? (How) is g/e discussed at Annual Negotiations? - (How) was the Country Gender Profile used in formulating the CS? - Gender visible in the Country Analysis? - Information requested & progress followed on national commitments (CEDAW, PFA)? - National debates on gender issues followed? used in revision of CS? - g/e addressed in Results Analysis? - g/e visible in Semi-Annual Reports? - g/e well reported in Agreed Minutes of Annual Negotiations? - Role of Socio-Cultural Analyst in the past? and now? How are expert inputs used? - Support on gender from Sida/Stockholm? - Use of local gender experts? Specific g/e expertise in key sectors? on key themes?

**ANALYTICAL FRAME WORK I: Statistics South Africa
Cooperation in the Field of Statistics between the Republic of South Africa and the Government of Sweden**

		Intervention Level			
	Study Objects	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Methods and tools
WHAT?	Gender Equality goal reflected in intervention design and implementation	<ul style="list-style-type: none"> - Roles of & dynamics among stake-holders in promoting g/e goal: Stats Sweden, Stats SA, Embassy, Norway? - Why less Swedish support to gender stats in the programme than originally planned? - To what degree was a gender per-spective integrated in design of all relevant programme components (censuses, household surveys, training, provincial offices, user-producer dialogue)? - 2 meanings of gender perspective: institutional & operational – how used? Which emphasised? - Even if not explicit in design, was a gender perspective included in implementation? <p>Obstacles to m/s gender? Missed opportunities?</p> <ul style="list-style-type: none"> - Implications of decision not to support gender stats in phase 2? 	<p>Statistics SA Pretoria & Kimberley</p> <p>Statistics Sweden</p> <p>Sida/Stockholm & Embassy</p>	<p>Stats SA top management</p> <p>Statistics Sweden consultants</p> <p>Sida officers, Stockholm & Embassy</p> <p>Gender Unit, Stats SA, & their gender network</p>	<p>Review of project design & M&E documents</p> <p>Review of statistical products & publications</p> <p>Key informant interviews, including by telephone</p> <p>Focus group work with Gender Unit & their gender network</p>
	Poverty reduction - links/synergies/ conflicts with Gender Equality	<ul style="list-style-type: none"> - Link between Phase 2 objective, to support poverty & living conditions stats (eg censuses, household surveys), and gender statistics? 	Same as above	Statistics SA	Include in focus group work, as above

	Study Objects	Intervention Level			Methods and tools
		Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	
HOW?	Stakeholder Participation (Including Children and Dialogue with Sida)	<ul style="list-style-type: none"> - Extent of dialogue between Embassy & Stats Sweden on supporting gender stats? Between Stats Sweden & Stats SA? - Type, quality & depth of participation by gender statisticians & by gender networks in engendering stats products? - Type and quality of participation by users of gender stats, to influence availability & relevance to needs? - Influence, role of other technical cooperation partners (Norway)? 	<p>Stats SA, Pretoria & Kimberley</p> <p>Statistics Sweden</p> <p>Sida/Stockholm & Embassy</p>	<p>Stats gender experts in Sweden, Norway & SA Consultants, Statistics Sweden Embassy & Socio-cultural adviser</p> <p>Stats SA managers, Gender Unit & gender network</p>	<p>Review of Minutes, Annual Negotiations</p> <p>Key informant interviews, including by phone</p> <p>Focus group work with Gender Unit & their gender network</p>
	<p>Mainstreaming strategy – degree</p> <ul style="list-style-type: none"> • Zero evidence? • Pro Forma? • Analytical? • Design <p>Integration?</p> <ul style="list-style-type: none"> • Implementation? • Evaluation and Monitoring 	<ul style="list-style-type: none"> - Stated 1996 strategy of 'foregrounding' and 'mainlining' gender equality by building institutional capacity: to what degree was strategy implemented in key programme components? - Fate of this strategy in Phase 2 (when no direct support to gender stats given)? 	<p>Statistics SA, Pretoria</p> <p>Sida/Embassy</p>	<p>Same as above</p>	<p>Review of statistical products & publications</p> <p>Key informant interviews</p> <p>Focus group work, as above</p>

Intervention Level				
Study Objects	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Methods and tools
<p>WHICH CHANGES?</p> <p>Effects of intervention on Gender Equality</p> <ul style="list-style-type: none"> Practical gender needs/strategic gender interests and changes Men and Male Roles Effects of intervention on women's empowerment; violence against women Intended/unintended and missed opportunities 	<ul style="list-style-type: none"> Population representativity (by sex, race) at Stats SA improved? Statistical products meeting women/men's, girls/boys' strategic interests: to reveal the realities of their lives (living conditions, livelihoods, gender violence, etc.)? Have women been 'made visible'? Have needs and demands for gender stats by users been met? Did the gender audit/review change the nature/design of statistical outputs? Have censuses, household surveys, economic stats series, training courses been engendered? 	<p>Statistics SA, Pretoria & Kimberley</p> <p>National & provincial institutions – users of gender statistics</p>	<p>Stats SA managers in key Directorates</p> <p>National gender experts/users of stats</p> <p>Provincial & municipal users of gender statistics (govt. NGOs & civil society, researchers, media)</p> <p>Statistical officers</p>	<p>Review of statistical products & publications</p> <p>Key informant interviews</p> <p>Focus group work with Gender Unit & national gender experts</p> <p>Mini-workshop with statistics staff and provincial & municipal statistical users</p> <p>Focus group with statistical officers</p>

**ANALYTICAL FRAMEWORK I: Local Government Development Support Programme (LGDSP), Northern Cape Province
GRID 1: Overall Programme, Provincial Gender, Poverty Alleviation & Children's Issues (GPC) Task Team and 3 thematic municipal Task Teams**

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
WHAT?	Gender equality goal reflected in intervention design and implementation	<ul style="list-style-type: none"> • Level of understanding of key concepts of Gender Equality? Applied within organisations? Applied to operations? • Gender analysis used as basis for design? Obstacles and missed opportunities? • To what extent did the integration of gender analysis change/influence the original objectives of the intervention? • Use of existing gender equality tools (e.g Sida's Action Plan, mainstreaming booklet...?) Obstacles in the application of these tools at design stage? • Use of Country-specific and international commitment tools such as CEDAW, Beijing Platform of Action....? Obstacles as to the integration of these tools? • Did support of Embassy SD Advisor make a difference? • Was any other gender expertise consulted? 	Swedish Embassy, Pretoria Dept. of H&LG, Kimberley Provincial level institutions & NGOs	<ul style="list-style-type: none"> • Sida – Stockholm & Embassy, including former SD Adviser • Sr. Programme management, including former Programme Manager & Programme advisers • Programme management in the Dept.H&LG; • LGDSP Steering Committee members; • GPC members • provincial OSW • NGOs 	<p>Document review: programme design, final reports, etc.</p> <p>Key informant interviews</p> <p>Participatory focus group with former GPC Task Team</p> <p>Participatory focus group with Gender Task Team, KCC</p>
	Relation of gender equality and poverty goals	<ul style="list-style-type: none"> • What does an "integrated approach" mean in practice? • Understanding of concepts of Gender and Poverty? Relative weighting of gender vs poverty? What are the links/synergies/conflicts between these two concepts? Concrete examples? 	Dept. of H&LG, Kimberley Garies: Poverty Alleviation, Job Creation & I-Stop Service Centre Task Team	<ul style="list-style-type: none"> • Dept'l & programme management; • (former) GPC Task Team; • Members of the Poverty Alleviation, Children's & Water & Sanitation Task Teams; 	<p>Document Review, including Training Modules</p> <p>Include issue in participatory focus groups with GPC Task Team and with Gender Task Team</p>

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
		<ul style="list-style-type: none"> Extent of inclusion of gender and poverty issues in Children's Issues PRA? Inclusion of PRA findings in design of activities? (How) is gender mainstreamed in poverty alleviation initiatives? Obstacles and success stories? 	<p>Calvinia: Children's Issues</p> <p>Barkly West: Water & Sanitation</p>	<p>municipal councillors and implementing staff in Garies, Calvinia & Barkly West</p>	<p>Key informant interviews with w/ Garies & Calvinia Task Teams: councillors & staff</p>
HOW?	<p>Stakeholder Participation (including Children and Dialogue with Sida)</p> <p>Mainstreaming strategy – degree (6 point scale)</p>	<ul style="list-style-type: none"> To what extent and how was there dialogue among the various stakeholders: Government partners, Sida HQ and Embassy, Ministry for Foreign Affairs? Obstacles and missed opportunities? Nature of consultation with OSW & relevant civil society organisations? GPC Action Plan developed in cooperation with other stakeholders? Who? How? Dialogue with key stakeholders: to what extent consultation took place with the poor/their representatives? Participation of women/men users in design & implementation of municipal services? What percentage of women and men? At what level? How productive and influential were participation of women and men? Differences and similarities? 	<p>Dept. of H&LG, Kimberley</p> <p>Garies: Poverty Alleviation, Job Creation & 1-Stop Service Centre Task Team</p> <p>Calvinia: Children's Issues</p> <p>Barkly West: Water & Sanitation</p>	<ul style="list-style-type: none"> Sida/Embassy Dept. H&LG Former GPC Task Team Civil society partners Key stakeholders in the 3 municipalities users of municipal services in the 3 municipalities 	<p>Key informant interviews with key stakeholders, including NGOs and civil society organisations</p> <p>Participatory focus groups w/ separate groups of women & men users/beneficiaries of municipal services</p>

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
		<ul style="list-style-type: none"> • What participatory mechanisms put in place? What obstacles or success stories of the implementation of such mechanisms? • How was a mainstreaming strategy understood and applied throughout the entire Programme? Degree of mainstreaming? • Degree of mainstreaming in Task Team Action Programmes? In Training Modules? Degree to which implemented? Lost opportunities? 			
WHICH CHANGES?	Effects of intervention on gender equality: <ul style="list-style-type: none"> • Practical gender needs/ strategic gender interests and changes • Men and male roles 	<ul style="list-style-type: none"> • What specific effects in Dept. H&LG? Results of dept'l gender strategy? Of dept'l Gender & Equity Committee? • How are concepts understood & used by Task Teams & their constituencies? Obstacles identified and success stories? • Utilisation of skills from gender training & workshops? Obstacles and success stories? • Availability of sex-disaggregated data in municipalities? Use and effects? • Assessment of GE needs/interests in communities? Attention to women/men's, girls/boys/young women/men's interests? How were they fulfilled? Obstacles and success stories? 	Kimberley: Dept. H&LG; (former) GPC Task Team Municipalities outside of Kimberley: Garies: Poverty Alleviation, Job Creation & 1-Stop Service Centres Calvinia: Children's Issues Barkly West: Water and Sanitation	<ul style="list-style-type: none"> • Sr. management in Dept. H&LG. • Members of (former) GPC Task Team • Provincial Statistics SA staff • Municipalities outside Kimberley: Women & men in Task Teams, working as councillors & staff in 3 towns • Women/men, girls/boys users of municipal services in 3 towns 	Document review, including final reports & Training Modules Examine gender audit data base in Dept. H&LG Key informant interviews Participatory focus group discussions w/ municipal Task Teams outside Kimberley

GRID 2: Gender Task Team, Kimberley Municipality

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
WHAT?	Gender equality goal reflected in intervention design and implementation	<ul style="list-style-type: none"> Understanding and application of gender equality goals: GE as an organisational goal and as an operational goals? Translation of goals into municipal Equity Policy? 	Kimberley City Council	<ul style="list-style-type: none"> Gender Task Team members KCC councillors & officials 	<ul style="list-style-type: none"> Key informant interviews Participatory focus groups
HOW?	Participation (including Children and Dialogue with Sida) Mainstreaming strategy – degree (6 point scale)	<ul style="list-style-type: none"> How did women officers at KCC participate in design and implementation of the gender equality approach? How did men participate? What types of dialogue, with whom, were important in the mainstreaming initiative? To what extent, at what levels is a gender perspective mainstreamed into KCC operations? 	Kimberley City Council	<ul style="list-style-type: none"> KCC management, including mayor & former mayor Women and men councillors & officials, including at ward level 	<ul style="list-style-type: none"> Document review: KCC Annual reports Key informant interviews Participatory focus groups
WHICH CHANGES?	Effects of intervention on gender equality <ul style="list-style-type: none"> Practical gender needs/ strategic gender interests and changes 	<ul style="list-style-type: none"> Why Council accepted to host Task Team? What effects, intended and unintended, have taken place? Effects of Council's Standing Committee on Gender? Obstacles and success stories? Effects of training & seminars? Concrete examples? 	Kimberley City Council and selected wards	<ul style="list-style-type: none"> City Council management, women and men committee members; councillors and officials Task team members Male councillors & officials; male ward & CDF leaders 	<ul style="list-style-type: none"> Review Standing Committee on Gender minutes and Council minutes; Screen Gender budget documents; Participatory focus group w/ Gender Task Team;

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
	<ul style="list-style-type: none"> • Men and male roles • Effects of intervention on women's empowerment; violence against women • Intended/unintended and missed opportunities • Practical gender needs/strategic gender interests 	<ul style="list-style-type: none"> • Changes in gender relations of councillors & staff? Positive/negative? Missed opportunities? • Effects on representation & participation of women councillors & staff in decision making bodies? On council wards? And on women & men in their constituencies? Concrete examples? • Results of gender budgeting? • Views of male councillors & staff? • Their understanding of goals & concepts? • Effects on relationships with female colleagues? • Effects of event(s) directed at men? • Experiences with sexual harassment? Actions taken? 		<ul style="list-style-type: none"> • Ward gender desks • Ward leadership • Women & men community members from selected wards 	<p>Small participatory focus groups with councillors & staff, women & men, separately;</p> <p>Key informant interviews with women councillors, (municipal & ward), and staff, & w/ ward gender desks;</p> <p>Observe Council meeting</p>
	<ul style="list-style-type: none"> • Linkage to other interventions 	<ul style="list-style-type: none"> • Relationship to gender equality issues and actions in Comprehensive Urban Plan (CUP) 	Kimberley City Council	<ul style="list-style-type: none"> • Gender task team; CUP management 	Key informant interviews

ANALYTICAL FRAMEWORK I: Comprehensive Urban Plan (CUP), Kimberley

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
WHAT?	<p>Gender equality goal reflected in intervention design and implementation</p>	<ul style="list-style-type: none"> • Is there an understanding of key concepts of Gender Equality? With KCC? With ward stakeholders? Do they use them? How? Degree of acceptance of GE goals? If imposed, perceived as coming from where? Level of understanding? Applied within organisations? Applied to operations? • Gender analysis used as basis for design? Baseline studies? Obstacles and missed opportunities? • To what extent did the integration of gender analysis change/influence the original objectives of the intervention? • Use of existing gender equality tools (e.g Sida's Action Plan, mainstreaming booklet...?) Mere duplication of Sida's g/e tools? Obstacles in the application of these tools at design stage? • Needs & interests of various groups of women & men addressed in all planning & technical topics? Why? Why not? Perceived obstacles? • Use of Country-specific and International commitment tools such as CEDAW, Beijing Platform of Action.....? Obstacles as to the integration of these tools? 	<p>Kimberley municipality Kimberley City Council KCC GTT Ward structure Local gender experts Relevant local firms & professionals (planners, construction, architects etc)</p>	<ul style="list-style-type: none"> • Sida – Stockholm & Embassy, including former SD adviser • Mayor, KCC technical staff, advisers • KCC councillors & technical staff involved with CUP process • GTT • Local gender activists &/or network • Ward representatives • Local planning and other professionals • Programme advisor (Castro) 	<p>Document review: CUP design, final plan, reports, etc. Key informant interviews Participatory focus group with KCC councillors & technical staff Participatory focus group with: • KCC GTT • local gender activists or network • local professionals • at wards</p>

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
		<ul style="list-style-type: none"> • Did support of Embassy SD Advisor make a difference? • Did support of programme advisor make a difference? • Was any other gender expertise consulted? • Use of a local gender network, KCC Gender Task Team (GTT) &/or local gender experts? • Factors influencing why gender included in some CUP topics, not others? 			
Relation of gender equality and poverty goals		<ul style="list-style-type: none"> • What does an "integrated approach" mean in practice? • Is there an understanding of relation of gender and poverty? Are they linked? How? Relative weighting of g/e vs. poverty alleviation? How are the synergies/conflicts between these two concepts understood? Concrete examples? • Extent of inclusion of gender and poverty issues in CUP? Inclusion of PPP findings on this in design of activities? • (How) is gender mainstreamed in poverty alleviation initiatives? Obstacles and success stories? 	<p>Kimberley municipality</p> <p>Kimberley City Council</p> <p>KCC GTT</p> <p>Local gender experts</p> <p>Relevant local firms & professionals (planners, construction, architects etc)</p> <p>Ward structure</p> <p>Hull St. & Roodepan Flats:</p> <p>Local community leaders</p> <p>Local civic organisations</p>	<ul style="list-style-type: none"> • Sida – Stockholm & Embassy, including former SD advisor • Mayor, KCC technical staff, advisers • KCC councillors & technical staff involved with CUP process • GTT • Local gender activists &/or network • Ward representatives • Local planning and other professionals • Programme advisor (Castro) 	<p>Document review: CUP design, final plan, reports, etc.</p> <p>Key informant interviews</p> <p>Participatory focus group with KCC councillors & technical staff</p> <p>Participatory focus group with:</p> <ul style="list-style-type: none"> • KCC GTT • local gender activists or network • local professionals • local community leaders • ward representatives

HOW?	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
	<p>Stakeholder Participation (including Dialogue with Sida)</p> <p>Mainstreaming strategy – degree (6 point scale)</p>	<ul style="list-style-type: none"> • To what extent and how was there dialogue among the various stakeholders: Government & Municipality partners, Sida HQ and Embassy, Hifab consultants, ao.? Obstacles and missed opportunities? • Nature of consultation with KCC & relevant civil society organisations? • CUP developed in cooperation with other stakeholders (KCC GTT, local planners & professionals, etc.)? Who? How? • Dialogue with key stakeholders: to what extent did consultation take place with the poor/ward representatives? • What participatory mechanisms put in place? What obstacles or success stories of the implementation of such mechanisms? Reasons for/meaning/level of participation? • Participation of women/men users in design & implementation of CUP? What percentage of women and men? At what level? How productive and influential were participation of women and men? Differences and similarities? 	<p>KCC</p> <p>Wards with respect to specific urban dev't activities (housing, roads, environment, etc.)</p> <p>Hull St. & Roodepan Flats</p>	<ul style="list-style-type: none"> • Sida HQ/Embassy • Mayor, former & present- KCC techn. depts implementing urban development activities • KCC staff involved in PPP • Ward and local community leaders • Civic organisations consulted or that participated • Hifab PPP consultants • Hull St. & Roodepan Flats community leaders & residents 	<p>Review PPP docs.</p> <p>Key informant interviews with key stakeholders, including NGOs and civil society organisations</p> <p>Participatory focus groups w/ separate groups of women & men ward representatives</p> <p>Participatory focus group w/ organisers of ward consultation</p> <p>Phone interviews with Hifab PPP consultants</p>

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
WHICH CHANGES?	<p>Effects of intervention on gender equality:</p> <ul style="list-style-type: none"> • Practical gender needs/ strategic gender interests and changes • Effects of intervention on women's empowerment; 	<ul style="list-style-type: none"> • Was the PPP gender-sensitive? [In which understanding of gender?] In design? In implementation? Who participated in information workshops? How mobilised? Any feed-back? How feed-back used? • Were civic organisations regarded partners? How? • Gender content of information & discussion? Reactions/effects? • Was a mainstreaming strategy understood and applied throughout the entire CUP process and in follow-ups? If so, how? Degree of mainstreaming? • What specific effects in KCC techn. depts implementing urban development activities? • How are concepts understood & used by involved stakeholders? Obstacles identified and success stories? • Is a gender perspective being included in implementation of CUP recommendations? Which ones? Why? How? At which level? With attention to gender differences in needs & interests? • Is relevant gender information available? • Availability of sex-disaggregated data in CUP & recommendations? Use and effects? 	<p>KCC</p> <p>Wards with respect to specific urban dev't activities (housing, roads, environment, etc.)</p> <p>Hull St. & Roodepan Flats</p>	<ul style="list-style-type: none"> • KCC techn. depts implementing urban development activities • KCC mayor & councillors • Members of KCC GTT • Hull St. & Roodepan Flats: community leaders & resident 	<p>Document review, including final reports, CUP Exhibition material, ao.</p> <p>Key informant interviews</p> <p>Participatory focus group discussions w/ women & men residents of the 2 housing areas</p>

Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
<p>violence against women</p> <ul style="list-style-type: none"> • Men and male roles • Intended/unintended and missed opportunities • Linkages to other Sida interventions 	<ul style="list-style-type: none"> • Assessment of GE needs/interests in communities? Attention to women/men's, girls/boys/young women/men's interests? How were they expressed? How fulfilled? Did they support or conflict with CUP' recommendations? Obstacles and success stories? • Effects of intervention on women's empowerment? Which? How do they show? Any attention to violence against women, girls and boys? Obstacles and success stories? Missed opportunities? • Among the various stakeholders: Men's understanding & acceptance of GE goals & concepts? Extent? Diversities? Obstacles? Success stories? • Perception by male technical staff of their roles as men/professionals? Challenges to &/or conflicts with own roles? Challenges w/ respect to CUP equity goals? • Observable changes? Obstacles? Success stories? • At what level, to what depth was participation achieved: by which stakeholders (incl. PPP)? • Obstacles? Success Stories? Missed opportunities? • Was KCC GTT proactive on CUP? Did latter officials seek gender advice with GTT? Role of programme adviser/ Embassy? Effects/results of interaction? 	<p>KCC GTT, Engineering Dept & Dept. of Housing & Local Government</p>	<ul style="list-style-type: none"> • Male stakeholder representatives – all levels 	<p>Observe a Community Development Forum (if feasible)</p> <p>Men only focus groups</p> <p>Key informant interviews on Role of KCC GTT in CUP</p>

Abbreviations:

KCC: Kimberley City Council

CUP: Comprehensive Urban Plan Kimberley

KCC GTT: KCC Gender Task Team

SD: Social Development Advisor

GE: gender equality

H&LG: Housing and Local Government

M/S: mainstreaming

w/: with

ANALYTICAL FRAME WORK I : Trees, Paving and Lighting Project (TPL)

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
WHAT?	Gender Equality goal reflected in intervention design and implementation	<ul style="list-style-type: none"> Was gender seen as an important issue during planning & implementation? Integration of gender features in the design process of the project? Did this process change the original objectives of the project? Did Embassy staff, Sida Advisors & consultants assist with handling of gender related issues? How? Gender analysis used as a basis for design processes? How were participants selected? Influence on composition of groups (women, men, girls, boys)? Was gender an issue in selection of sub-contractors? Understanding & support of gender concepts & goals by direct project participants? By KCC and at community level? 	<p>Kimberley City Council</p> <p>Kimberley municipality: wards, local neighborhoods where project components were implemented</p>	<p>KCC officials: Chief Engineer, Engineering Dept., Parks Dept. & heads of other relevant departments</p> <p>TPL Steering Committee</p> <p>KCC Councillors</p> <p>KCC Gender Task Team</p> <p>Ward & Community leaders</p> <p>Swedish Embassy</p>	<p>Document review: progress reports, minutes of meetings, final report</p> <p>Key informant interviews</p> <p>Focus group with heads of departments at KCC</p>
	Poverty reduction – links/synergies/ conflicts with Gender Equality	<ul style="list-style-type: none"> Did the project have or develop a poverty reduction focus? Were gender issues linked to poverty reduction? 	As above		Key informant interviews

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
HOW?	Stakeholder Participation (including Children and Dialogue with Sida)	<ul style="list-style-type: none"> • What was the type & level of women's & men's participation in design and implementation of the project activities? • Did women/men have different priorities? • How were decisions taken? • Was a quota for women's participation implemented, as planned? • How did women & men participate in implementation of activities – as workers, managers & decision makers, in decision making, overseeing and maintenance? • Were local gender networks used & consulted in implementation of project components? 	Kimberley City Council Trees for Africa, Johannesburg Selected wards & local neighborhoods where project components were implemented Local gender networks, ward structures & community organizations	Training staff, Trees for Africa KCC officials, as above Ward & Community leaders Local gender networks and community-based organisations Community beneficiaries	Document review Key informant interviews Participatory focus groups at community level: – with women & men residents in neighborhoods where project components were implemented – with women & men who participated in project implementation
	Mainstreaming strategy – degree (6 point scale)	<ul style="list-style-type: none"> • Was there mainstreaming in design of the project? At what level? • To what degree was a mainstreaming strategy understood & applied in all project components/ activities? • Is there support for gender main-streaming at KCC? 	Kimberley City Council Ward & community structures	Kimberley City Council	Key informant interviews
WHICH CHANGES?	Effects of intervention on Gender Equality <ul style="list-style-type: none"> • Practical gender needs/ strategic gender 	<ul style="list-style-type: none"> • Do residents of local communities see an improvement in their neighborhoods? Differences in women's & men's views? • Did women benefit from training as workers? As sub-contractors? How? • Increase in number of women contractors? 	Kimberley City Council Selected wards and local neighborhoods Contracting firms	KCC officials, as above TPL Steering Committee KCC Councillors Ward & community leaders	Document review Key informant interviews Focus group at KCC with heads of depts., as above

	Key evaluation issues/ Questions	Specific questions	Geographical or institutional concentration of evaluation	Key informants, focus group participants, etc.	Data collection and analysis methods
	interests and changes <ul style="list-style-type: none"> • Men and Male Roles • Effects of intervention on women's empowerment; violence against women • Intended/unintended and missed opportunities 	<ul style="list-style-type: none"> • Did women benefit from participation in decision-making & management? How? • Any unintended impacts on women's roles – eg, additional burden of work? • Any observable change or increased acceptance of gender equality at community level? • Has KCC become more gender sensitive? • How did men react/respond to working with women as fellow workers & managers? • Any changes in role identities – men AND women as construction workers? • Is there ownership of project outputs by direct beneficiaries – women, men & youth in communities? Sustainability? 		Sub-contractors Women, men, & youth residents, beneficiaries & project participants in local communities	Participatory focus groups at community level, as above
Linkage to other Sida-supported projects		<ul style="list-style-type: none"> • Did KCC make links between TPL, CUP & the Gender Task Team (GTT)? • Did Sida and/or its advisers support linkages? • Was the GTT consulted/involved in TPL implementation? 	Swedish Embassy KCC	Sida Programme Officers and Advisers Project management & GTT	Key informant interviews

Annex 4

Men and Male Roles in Post-Apartheid South Africa¹⁷

1. Introduction

There is evidence¹⁸ to show that the process of redefinition of female and male identities has been asymmetric: while for women it has progressed, for men it is just beginning. According to specialists¹⁹, a historical process has nevertheless begun which may lead to the redefinition of male identity towards a new cultural gender balance and new types of gender relations.

It has been argued that a rigid understanding of stereotyped gender roles prevents individuals from realising their full potential and runs counter to the principle of participatory democracy. While women's role and status have been broadly debated over the last decades, men have been perceived as standard human beings – the norm – and men's roles and positions have hardly been discussed, much less questioned. Most men, through their upbringing, feel entitled to dominant positions in the family, work and political life and react negatively when this entitlement is not fulfilled or considerably diminished. These negative reactions might lead to violence (domestic/structural) or to simple refusal to act on concrete measures towards gender equality.

The South African evaluation team found that the concept of male roles was absent in all four interventions examined. Cautious steps, however, had been taken in some interventions “not to add to men's fear of gender equality.” This strategy mainly resulted in stripping the concept of gender equality of its depth and socio-economic context and also failed to address male roles in conservative structures and institutions. Men were thus identified mainly in terms of their predicted resistance to the introduction of gender equality rather than as a potential source of change or as an ally in the gender equality struggle.

The team identified two main opportunities for including the concept of male roles within the strategy of mainstreaming gender equality in South Africa. The first opportunity is the developing academic research area on

¹⁷ This Annex was prepared by a member of the South African evaluation team, June 2001.

¹⁸ *The new male identity between crisis and new redefinition: towards equivalence of the two genders*, by Gioia Di Cristofaro Longo, Italy (1997)

¹⁹ *Searching for our identity*, by Daniel Rios Pineda, El Salvador (1997)

male roles and masculinities in post-*apartheid* South Africa. This will provide a basis for strengthening the concept of gender equality and addressing pertinent issues within the South African context. The second opportunity is the growing concern for the issue of male roles by South African NGOs, especially in the context of organisational changes and violence against women.

The team further feels that inclusion of work on men and male roles is also pertinent and crucial within the additional cross cutting issue to be mainstreamed within Sida's country programme in South Africa, namely HIV/AIDS.

2. Academic Research

2.1 Definition of male roles

The concept of male roles is defined in two ways. First, it seeks to identify and explore the different forms in which masculinity is expressed, as opposed to the unchallenged standard form of masculinity equated to patriarchy. In the context of South Africa, this would raise the following questions:

- How are male roles and masculinities changing from a strongly patriarchal environment dominated by a white, male, Afrikaans-speaking élite to a multi-racial, multi-ethnic and more gender balanced ruling class?
- What are the challenges South African men are facing in this transitional society?
- To what extent are men prepared to question and broaden the perspective of their identity in order to live up to these challenges?

Second, the concept of male roles is also defined in relation to gender equality, thus widening the debate on gender equality by focusing also on men. In this context the second definition raises the following issues, among others:

- How can men be “allies” of women's struggle towards gender equality in post- *apartheid* South Africa?
- How can changing male roles contribute to gender equality in relation to such issues as:
 - Violence against women?
 - HIV/AIDS?
 - Child care and paternity leave?
 - Fighting gender stereotypes?
 - Access to, allocation of and control over resources?
 - Institutional changes?

2.2 Male roles in South Africa

As Robert Morrell²⁰ explains, “Despite South Africa’s new constitution which prohibits discrimination on the grounds of gender and sexual orientation, there is a high rate of violent crime against women and sexual harassment within the country and male power remains entrenched.” He further argues that changes in patriarchy are occurring but that these are being strongly contested.

“Within South Africa, race, class and gender continue to be key social divisions and cleavages for inequalities. For men, the current transition has been uncomfortable because of their dominance and previous unquestioned position in South African societies. The presence of feminist concerns within government has put men on the defensive.”²¹ Morrell further explains how, with the accession of Nelson Mandela to the presidency, the subsequent initial period of radical judicial and political institutional restructuring has had an impact on women and men and their respective roles. He emphasises that the gender aspects in the country’s restructuring process have primarily involved identifying women for advancement and have implicitly labeled men as “the problem.”

Morrell illustrates the implications of class and race for gender relations and for male identity as follows:

“A critical economic reality combined with ongoing political violence in some regions (notably KwaZulu-Natal) has had deep implications for gender relations and for male identities. In KwaZulu-Natal, possibly worse than anywhere else, family patterns and roles among the African working class (including a large number of unemployed) have changed. It is widely commented that ‘men no longer take decisions, no longer provide for the family.’ While in some regions the absence of the man from the house may not indicate his absence from family affairs or lack of interest and influence in family affairs, in KwaZulu-Natal at least, it signals the decline of authority and self esteem amongst many men. Even in rural areas the authority of the patriarch is being challenged.” Morrell points at the rights of women to own and control land as having a direct impact on male roles, challenging and undermining male chiefs’ power that largely rested on land ownership.

Morrell stresses that the difficulty of making a living from the land led most young men to seek a living in towns. This process of urbanisation thus removed young men from direct political authority of chiefs and fuelled an anti-elder, generational movement among the youth, which was striking and powerful in the anti-*apartheid* struggles of the 1980s. Young men and women no longer easily accepted the authority of the formerly revered male family head. In short, African patriarchy was beginning to be eroded by a combination of political and economic forces.

²⁰ “South African men in the post-apartheid era: responses, dangers and opportunities,” by Robert Morrell (1997). Morrell is the main academician to write on this topic in South Africa.

²¹ *Changing Men in Southern Africa*, edited by Robert Morrell, ZED Press, London, and University of Natal Press, Durban (2001)

3. Actions by South African NGOs in the Field of Male Roles

There are several organisations in South Africa working with men: the Gender Education and Training Network, GETNET, which works on awareness raising for men; Men for Change, which works with young men to combat violence against women; Zibonele Health Area Trust, which works with male partners to combat the spread of HIV/AIDS; MICRO, which works with men who have been convicted of violent crimes, and Network on Violence against Women, an umbrella organisation which works with its members to combat violence against women.

GETNET is one example of civil society activism around the issue of male roles. GETNET is based in the Western Cape but works nationally. It held its first men's workshop in 1996. Since then, it has focused on the construction of masculinities and the roles of men in organisations and in organisational change, working with organisations such as trades unions and local governments. Men's Gender Awareness Raising Workshops have been held in all provinces. Thirty men have been trained, of whom eight are active gender educators.

GETNET²² emphasises that work with men needs to be placed more strongly within the context of efforts to transform important South African institutions. The work on men is seen as a necessary part of achieving gender equality and women's empowerment in the re-prioritisation and re-allocation of society's resources, so that the needs and interests of women and girls are met. It is believed that men in South Africa continue to dominate access and control of resources as well as their allocation and distribution. Hence the necessity of including education and training work with men in gender related activities and raising men's gender awareness so that they understand the development needs of women and girl children. As a headline in their newsletter states, the issue is "wearing the pants, skirting the problem."

In the Northern Cape Province, where most of the South African field study took place, debate on men's roles has only just begun. However, the evaluation team identified potential opportunities in this field during a focus group discussion with representatives of member organisations in the local Network on Violence against Women. In this context and in other interviews the team met progressive men, both young and older, who were open to the idea of gender equality and who were starting to become pro-active in changing patterns of violence in men.

²² "NETWORK news" Gender education and training network. February 2001. GETNET, South Africa

4. Conclusion

Just as women's movements have challenged traditional understandings of women's roles in society, new men's movements attempt to deconstruct the standard concept of "masculinity" into different and new forms of "masculinities" that are more sensitive to the concept of gender equality. As opposed to men's reactionary movements against feminism and in defence of men's privileges, the new men's movements for a more just reallocation of resources and against violence will enhance and strengthen progress towards gender equality.

Annex 5

Selected Statistical Indicators²³



Figure 1 - Population by sex and population group, NC 1996.

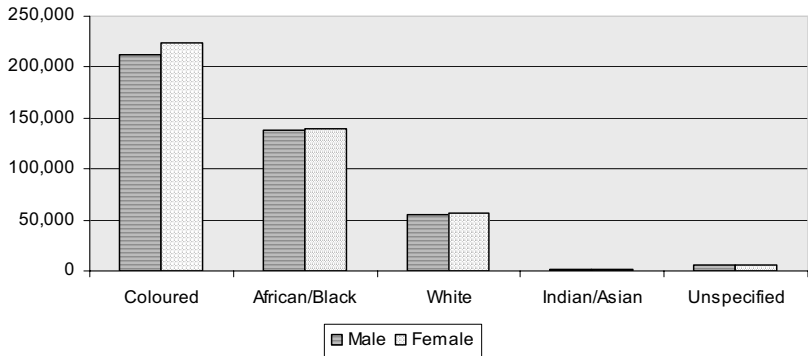
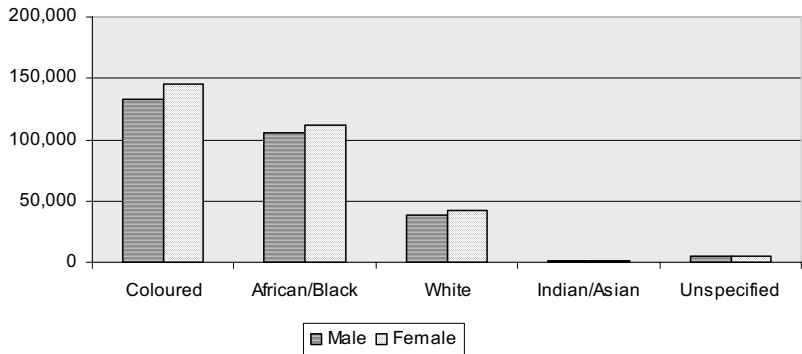


Figure 2 - Urban population by sex and population group, NC 1996.



NC in these and the other figures refers to Northern Cape Province, South Africa

Source: Statistics South Africa, Population Census 1996

²³ Mr. Ephraim Ngizwenayo, Senior Survey Statistician at Statistics South Africa in Kimberley, kindly assisted the evaluation team by preparing the following figures. Henrik Steen Pedersen of CowiConsult formatted the figures.

Figure 3 - Non-urban population by sex and population group, NC 1996.

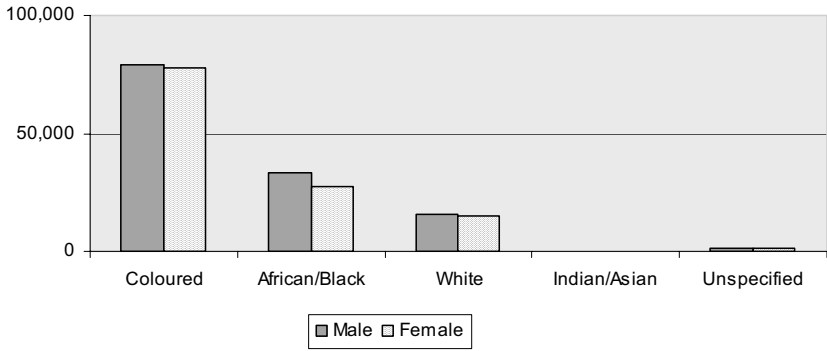
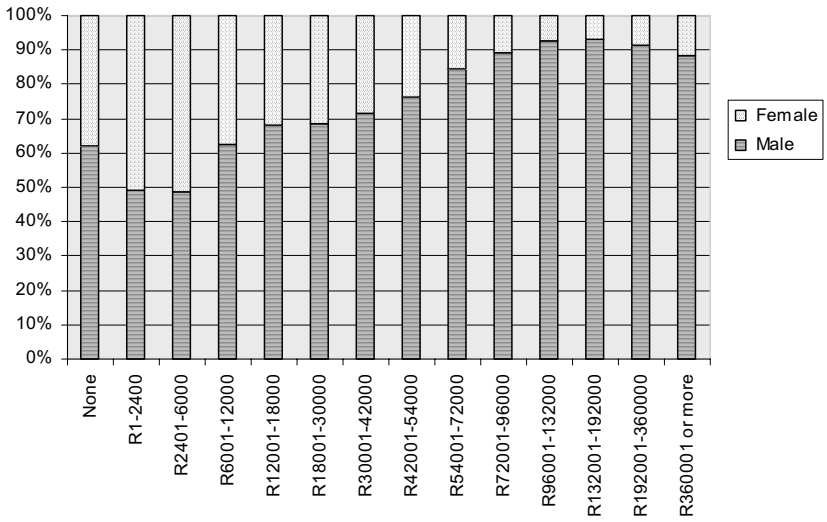


Figure 4 - Urban households by annual income and sex of household head, NC 1996.



Source: Statistics South Africa, Population Census 1996

Figure 5 - Non-urban households by annual income and sex of household head, NC 1996.

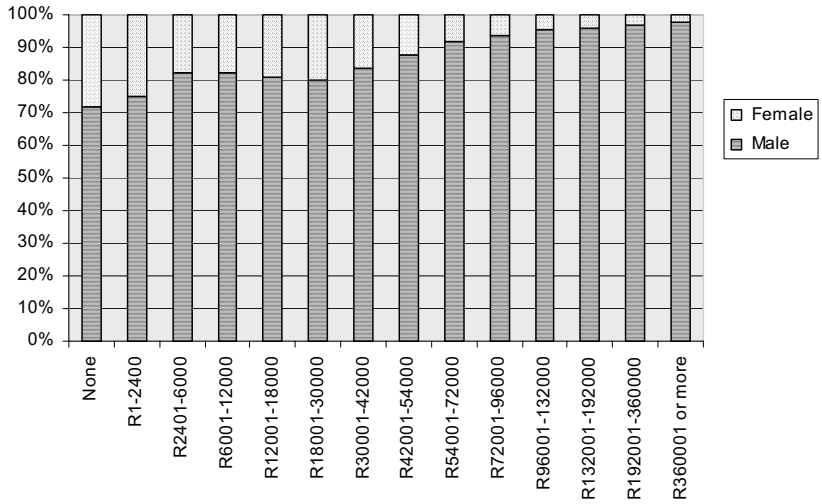


Figure 6 - Population by employment status and sex, NC 1996.

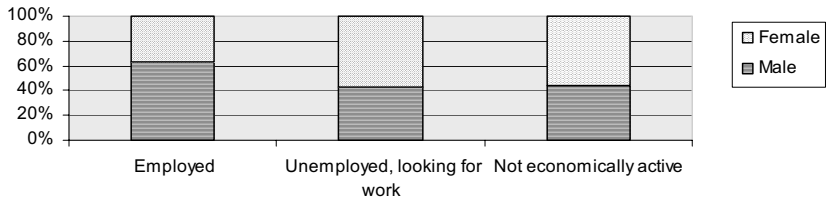
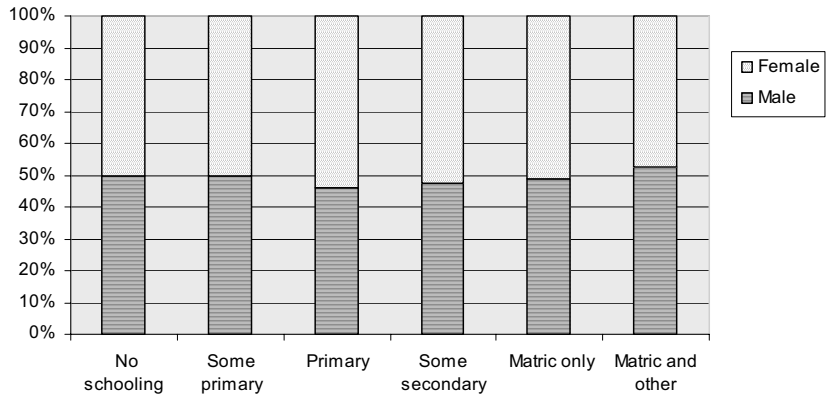


Figure 7 - Population by highest level of education and sex, NC 1996.



Source: Statistics South Africa, Population Census 1996

Figure 8 - Employed by type of occupation and sex, NC 1996

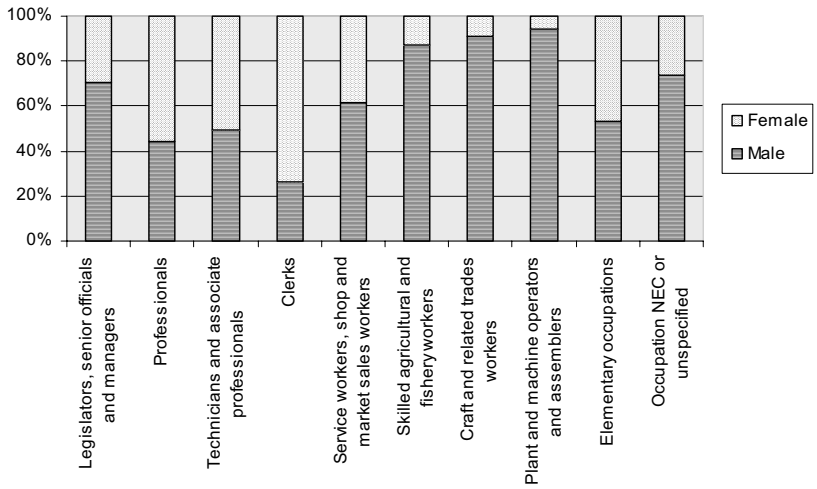
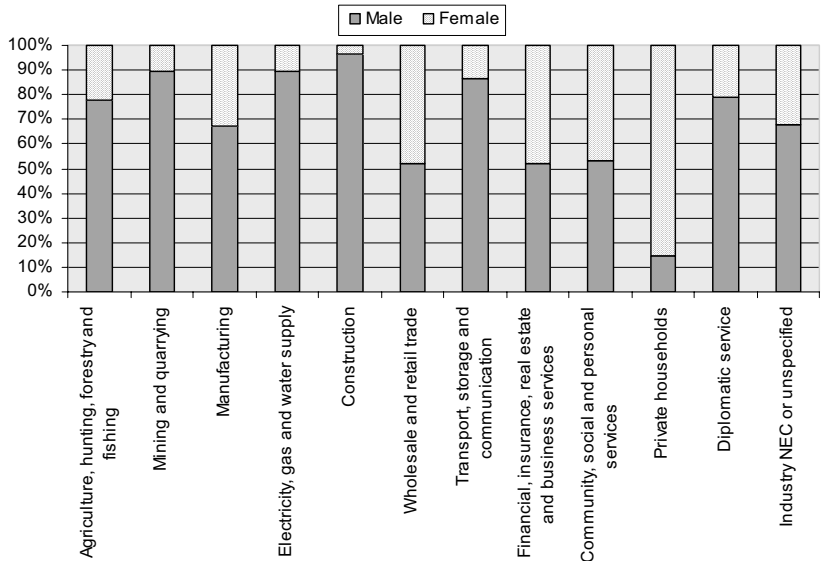


Figure 9 - Employed by employment sector and sex, NC 1996.



Source: Statistics South Africa, Population Census 1996

Figure 10 - Employed by individual monthly income and sex, NC 1996

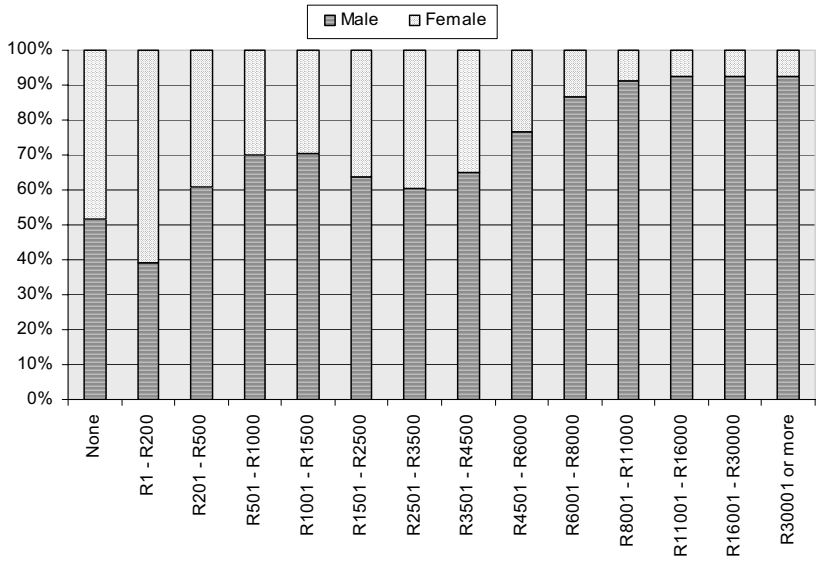
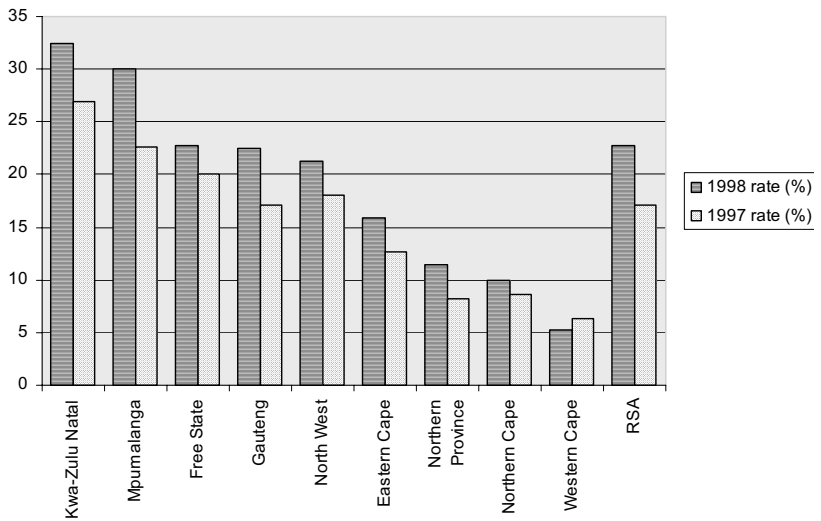
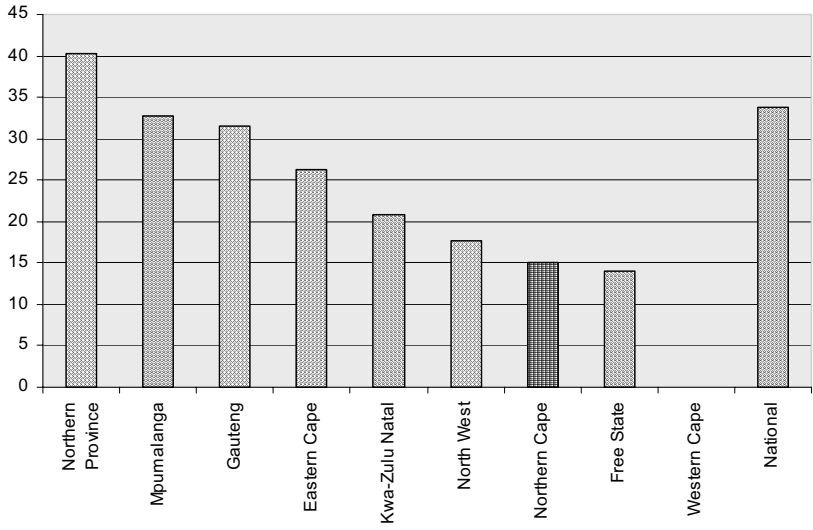


Figure 11 - HIV/AIDS prevalence rate by province, RSA 1997/1998



Source: Statistics South Africa, Population Census 1996

Figure 12 - HIV annual rate of increase (%) by province, RSA 1998.



Annex 6

Agenda for the South African Country Study

DATE	TEAM	ORGANISATION	ACTIVITIES
22 April	All team members		Team meeting
23 April	All team members	Sida Swedish Embassy, Pretoria	Individual interviews Round Table discussion
24 April	Susanne, Sarah & Kgotso Bonnie & Pethu	Office on Status of Women, Pretoria Former GPC Task Team Coordinator, Johannesburg Commission on Gender Equality & Sangoco – Johannesburg Treasury & Stats SA – Pretoria	Interviews
25 April	All team members Pethu & Bonnie All team members	Disability Desk – President's office & Stats SA	Team meeting Fly to Kimberley
26 April	28 – 29 April	Stats SA,, Dept. Housing & Local Government Kimberley City Council: City manager; Head of Gender Task Team Kimberly City Council Network on Violence Against Women	Interviews & planning session Interviews Observe council meeting Focus group
27 April (national holiday)	All team members		Team meeting on methodologies
28 – 29 April			Individual work, arrival of first participant from UTV
30 April	Bonnie & Pethu Susanne, Sarah & Kgotso Susanne & Kgotso Susanne	Stats SA, Dept. H&LG Kimberley City Council: City Engineer & Roodepan Housing Officer Galeshewe: Street walk Roodepan: CBO leaders and local councillors	Interviews Interviews Unstructured interviews, residents Focus group
01 May (national holiday)	Bonnie & Kgotso Sarah, Pethu & True	Vergenoeg: Street walk	Unstructured interviews, residents, Travel to Cape Town & Garies

02 May	Sarah, Pethu & True Bonnie Susanne Kgotso Susanne, Kgotso	Poverty Alleviation Task Team, Garies Dept. H&LG/LGDSP, Stats SA Sida Long-Term Adviser at KCC & various planning officials KCC: Officials of City Engineers' Department	Interviews, Focus group & visit to employment creation projects Interviews Interviews Interviews Focus group Arrival of second participant from UTV
03 May	Sarah, Pethu & True Bonnie & Eva Susanne, Kgotso & Eva Susanne, Kgotso	Poverty Alleviation Task Team Members, Garies Former LGDSP chair, Former mayor, Stats SA KCC: Gender Task Team KCC: CUP related Urban Agriculture & other beneficiaries	Interviews, visit to projects, travel to Calvinia Interviews Focus group Focus group
04 May	Sarah, Pethu & True Bonnie Kgotso & Eva	Children's Issues Task Team – Calvinia Children of Calvinia Stats SA Water & Sanitation Task Team, Barkly West	Interviews & Focus group Informal discussions Focus group/mini- workshop Interviews, site visits & discussions with beneficiaries
05 May	Sarah, Pethu & True Other team members	Children's Issues Task Team – Calvinia	Complete work, drive to Cape Town Individual work
06 May	Sarah, Pethu & True Britha, overall Evaluation Coordinator Other team members		Arrive in Kimberley Arrive in Kimberley Individual work
07 May	Pethu, Britha & Eva Bonnie, Sarah, Pethu & True Bonnie, Pethu & Eva Susanne, Kgotso & Britha	KCC: Female Councillors Dept. H&LG (LGDSP) Stats SA, Kimberley KCC: CUP Roodepan Flats housing project beneficiaries, CBO' leaders and local councillors	Focus group Reporting-back/round table discussion Reporting-back/round table discussion Focus group
08 May	Kgotso, Susanne, Bonnie, Britha Kgotso, Susanne, Bonnie, Britha	KCC: Sida Long-Term Adviser KCC: City Engineers' Department.	Interview Reporting-back/round table discussion
09 May	All Team members		Reviewing of and validating evaluation results Fly to Johannesburg

10 May	Bonnie & Pethu All Team members	Stats SA, Pretoria	Follow ups meetings Team meeting to prepare for the debriefing at the Embassy
11 May	All team members Bonnie, Pethu & Britha	Swedish Embassy, Pretoria StatsSA, Pretoria	De-briefing meeting Reporting-back/round table discussions
12 – 13 May	All team members		Departure

Annex 7

People Met/Interviewed

1. Swedish International Development Cooperation Agency (Sida)

1.1 Stockholm

*²⁴Colbro, Ingalill, former Senior Programme Officer, Democratic Governance

Elofsson, Mikael, Head of Division for Southern Africa

Fredriksson, Lisa, Programme Officer, Democratic Governance

Gjerdrum, Cecilia, Desk Officer for South Africa

Nordström, Lennart, Head of Division, Democratic Governance

*Sevefjord, Birgitta, former Desk Officer for South Africa

Sylwander, Lotta, Socio-Cultural Adviser, Urban Development

1.2 Embassy, Pretoria, South Africa

Joelsdotter Berg, Eva, Programme Officer, Education and Culture

Kjellson, Thomas, First Secretary (Development)

Marcus, Tessa, HIV/AIDS Coordinator

Muraloki, Uriel, Programme Assistant

Norrlöf, Claes, Head of Development Co-operation

Sundelin, Dag, Programme Officer, Urban Development

2. Urban Development Programmes: Comprehensive Urban Plan and Trees, Paving and Lighting

City Engineer's Department, Kimberley City Council

Aucamp, T. Nick, Head, Urban Planning Section

Cooper, Tony, City Engineer

²⁴ * refers to telephone interviews

Ebersohn, Dick A., Senior Urban Planner, Urban Planning Section
Engelbrecht, Ron, Chief Superintendent, Test & Metering (Electricity)
Limburgh, H., Clerk of Works, Low Cost Housing Project, Housing Support
Centre
Mazzonzi, Massimo, Horticulturist
Nkomombini, N.S., student, Housing Support Centre
Pretorius, Raymond, City Electrical Engineer
Schoeman, J.C., Low Cost Housing Project Coordinator/Manager, Housing
Support Centre
Suliman, Mohamed Zayhied, Housing Officer, KCC representative in
Roodepan

Other Officials

Chwarisang, Maki, former Mayor, Kimberley Municipality
Makume Mac, City Manager, Kimberley City Council
Marin-Castro, G.E., Sida Housing Programme Advisor, Kimberley City
Council
*Mohlund, Örjan, former Hifab Programme Manager for CUP
Park, Jeuness, Trees for Africa

Street walk in Galeshewe, Kimberley

2 young mothers
1 single (sick) mother
3 young boys
1 older man and his elder sister

Street walk in Vergeneog, Kimberley

3 women
4 male youth, 1 female youth
former ward Councillor, Mr. Scara Nxeba

Group of community representatives, Roodepan

Devona S. Fillis, Councillor
Dolly Swartz, volunteer, Tele Centre
Pastors, United Ministers Alliance, Pescodia/Kimberley:
K. Abrahams
H.P. Benjamin
R.M. Gewers
J. Mahema
H. Swak
J. Thys

Housing Support Centre

Sylvia Bosman, Faith Community Fellowship Life Saves, Urban Agriculture

Remonia Edwards, Tsepanang School Wear

Sophie Esau, Tsepanang School Wear

Mary Lelake, Faith Community Fellowship Life Saves, Urban Agriculture

Mara Masitwe, Tsepanang School Wear

Rebecca Meles, Masakhane Clinic, Bopanang

Unice Molefe, Riverine project

Constance Mongale, Masakhane Clinic, Bopanang

Isa Selina Nkomo, Housing Support Centre, councillor

Iris Nkumalo, Riverine project

Isaac Prince, Caretaker, Faith Community Fellowship Life Saves, Urban Agriculture

Hilda Roberts, Faith Community Fellowship Life Saves, Urban Agriculture

Gladys Sebeela, Masakhane Clinic, Bopanang

Lillian Segano, Masakhane Clinic, Bopanang

Miriam Timla, Masakhane Clinic, Bopanang

Residents: Roodepan, Pescodia & Roodepan Flats

Audray Aman, Dween Court, Pescodia

Lena Buys, Community Development Forum, ward 2, Pescodia

Devona S. Fillis, councillor

Sylvia Fleming, Annalise Court

Peter Francis, Barbara Court

Florence Guys, Flat Committee, RDP, Annalise Court, Roodepan

D.D. Jonkers, Annalise Court, Roodepan

Dolly Mackay, councillor, Pescodia

Elfreda Meyer, Blance Court, Roodepan

M.Z. Suliman, Housing Officer, KCC/Roodepan

Dolly Swartz, volunteer, Tele Centre

3. Local Government Development Support Programme

Swedish Association of Local Authorities

*Engström, Peter, previously LGDSP Project Manager

Department of Housing and Local Government

Dhlomo, Irene, Sr. Administrative Officer

Haasbroek, S.F., Chief Engineer, Technical Services Directorate
Mafa, Mike, Deputy Director
Montse, M.S., Sr. Administrative Officer
Thina, S.G., Director, Planning and Development

Steering Committee

Matlaopane Guguletu, former Director, Department of Housing and Local Government and Chair, Steering Committee
Ntlangula Agnes, Member of the Steering Committee and former member of Gender Task Team

Female Councillors appointed to standing committees, Kimberley City Council

Trickey Lebona
Pulane Legwabe
Makarabo Matela
Gloria Mothomme
Gladys Mtyukwawe
Winnie Ngobeza
Selina Nkomo
Agnes Ntlangula
Maria Snyman
Monica Nosi Thole

Council meeting

African National Congress councillors (men: 16, women: 14)
Democratic Party councillors (men: 7, women: 3)
Mayor, City Manager, Chairman of the Council and c250 pupils and others in audience

Gender, Poverty and Children's Task Team (provincial)

Molusi, Mary, Family and Marriage Association of South Africa
Montse Salina, Member of Gender, Poverty and Children Task Team
Papenfus, Deidre, Head of Task Team and Assistant to LGDSP Project Manager

Gender Mainstreaming Task Team, Kimberley City Council

Faber, Roelien, Accountant, Client Services
Jordaan, Mariette, Head Task Team
Senekal, Saskia, Head laboratory Services
Thembani, James, Equity Manager

Poverty Alleviation, Job Creation & One-Stop Mobile Centre Task Team, Garies

Coete, JJ, Community Leader (former member of Task Team)

Jordaan, Wouter, Head of Task Team

Maarman, Kobus, Constituency Community Leader

Miggel, Lynette, Councillor, Kamiesberg Municipality

Saul, Millicent, Member of Task Team

Also in Garies

Maarman, Katie, Local Development Forum

Nicholas, Jules, Manager of the Granite Mining Project

Saul, Reinette, (sister of Millicent Saul)

Leather and Candles Project employees (13 women)

Water Plant Project employees (3 women and 2 men)

Children's Task Team, Calvinia

Daniels, Benjamin, Former Member of the Task Team

Dyers, Magda, Councillor

Fortun, Jannie, Principal, Houtam High School

Ockhins, Sarah, Child Welfare Officer

Swart Mariette, Department of Social Services and Population Development

Viljoen, Noel, Head of Task Team

Children of Calvinia

George Cloete

Althea Kleynhans

Karlien Meerka

Kevin Mentu

Manuel Reterse

Behati Steentamp

Other

Grove, Peter, Namaqualand Resource and Education Centre

Barkly West City Council

Jammer, Paul, Head of the Water and Sanitation Task Team

Matolweni, Epang, Mayor

Eilerd, Johannes, City Manager

Kema, Patrick, former City Manager

Beneficiaries, Barkly West

7 women, 4 men

4. Statistics South Africa – Statistics Sweden Technical Assistance

Statistics Sweden

*Åström, Lena, previously long-term consultant (provincial offices), Stockholm

Denell, Chris, previously long-term consultant (Strategic Planning Advisor), Stockholm

Guteland, Gösta, Senior Advisor & Team Leader, Pretoria

*Hedman, Birgitta, gender expert, Stockholm

Näsholm, Hans, Senior Advisor, Household Surveys, Pretoria

Statistics South Africa

Budlender, Debbie, Deputy Director (Gender Unit), Pretoria

Chobokoane, Ntebaleng, Assistant Director Research (Gender Unit), Pretoria

Kahimbaara, John Akiki, Director Provincial Offices, Pretoria

Kruger, Krista, Information Officer, Kimberley

McGregor, Tony, Deputy Director, Human Resource Development, Pretoria

Modise, Lefi, Regional Survey Manager, Kimberley

Molongoana, Calvin, Acting Director, Planning and Operations, Pretoria

Moss, Glenn, Director, Publishing, Marketing and User Services, Pretoria

Mpetsheni, Yandiswa, Assistant Director Research (Gender Unit), Pretoria

Ngizwenayo, Ephraim, Sr. Survey Statistician, Kimberley

Oliphant, E.T., Acting Provincial Survey Manager, Kimberley

Shebi, O. G., Provincial Manager, Kimberley

Other:

*Wold, Björn, International consulting, Statistics Norway

Focus group: Statistics in Action Course graduates, Pretoria (4 men, 2 women)

A. Chauke

S. Gqabasa

P. Kgomo

M. Manamela

N. Naidoo

S. Worku

User/Producer Mini-Workshop, Kimberley (7 men, 7 women)

Da Vinci, V.S., Adult Educators and Trainers Association of SA

Farrell, L., Dept. of Education
Kruger, Christa, StatsSA
Leven, Rita, Linri Enterprises
Montshiwa, Veronica, Kimberley Crisis Centre
Ngizwenayo, E., StatsSA
Oliphant, E.T., StatsSA
Power, Beverley, Department of Welfare
Rabie, Ryan, Dept. of Health
Shebi, O.G., StatsSA
Steyn, Sharon, Northern Cape Chamber of Commerce and Industry
Taljaard, Leone, Association for Persons with Physical Disabilities
van Vuuren, Kobus, Northern Cape Provincial Taxi Co-operative Ltd.
Wax, Colette, Department of Social Services

5. Other Stakeholders: Pretoria, Johannesburg, Kimberley and Northern Cape Province

Ditlhake, Abie, Executive Director, South Africa NGO Coalition (SANGOCO)

Mahaye, Zith, Chief Executive Director, Commission on Gender Equality

Masanga, Jane, Office on the Status of Women, Pretoria

Matsebula, Sebzile, Acting Director, Office on the Status of Disabled Persons, President's Office

Moleko, Regina, Acting Deputy Director, Office on the Status of Women, Kimberley

Nkomo, Susan, Gender Specialist, Office on the Status of Women

Rajie, Shaheed, Chief Director, International Development Co-operation, Department of Finance

Zulu, Lindiwe, former Head of Women's Empowerment Unit and Chief Director for Equatorial Africa, Foreign Affairs

Network on Violence against Women, Kimberley

Barlow, Communication Officer, Dept. of Justice

Fani, B.M.F., Project Management and Development Consultant

Gabaatholwe, Peace Club

Gaserange, Youth Against Crime

Jamdies, Galeshewe Constituency Office

Kholwane, Youth Against Crime

Khumalo, Young Christian Students

Madholo, Youth Against Crime
Makoko, SANGOCO
Moleko, Office on the Status of Women
Montshiwa, social worker, Kimberley Crisis Centre
Motsoatsoa, Young Christian Students
Ntlangula, Provincial Co-ordinator, Network on Violence against Women
Phepheng, Office on the Status of Women
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Department for Africa

Sida Evaluations may be ordered from:

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Fax: +46 (0)8 760 58 95
info@sida.se

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Phone: +46 (0)8 698 5163
Fax: +46 (0)8 698 5610
Homepage: <http://www.sida.se>

