Transforming the mainstream

Seminar report on mainstreaming and inclusive approaches in EU development cooperation

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ONE WORLD ACTION
FOR A JUST AND EQUAL WORLD

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HelpAge International
Leading global action on ageing

Transforming the mainstream

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Seminar organised by APRODEV, HelpAge International, One World Action, WIDE

Contents

Preface

Four organisations came together to organise a meeting in late 2003 to analyse current mainstreaming strategies and inclusive approaches in EU development cooperation. Over 100 people attended. The EU representatives came from DG Development, DG Trade and Aid Co. Representatives of a wide range of NGOs and networks attended, together with civil society participants from EU member states, El Salvador, India, Bangladesh, Jamaica, South Africa, Guatemala, Nicaragua and Honduras.

We organised this seminar because we share the conviction that substantial numbers of children, women and men of all ages are being failed by current development policy and practice. We believe that, unless an inclusive approach is adopted, development will go on failing large numbers of citizens. Our experience and research shows that the achievement of the Millennium Development Goals (MDGs) will not be possible unless policies are adjusted to ensure the inclusion of the most marginalised in development programming and related financial decision-making.

This seminar, entitled Everywhere and Nowhere: a Seminar on Mainstreaming and Inclusive Approaches in EU Development Policies, took place in the context of an ongoing analysis and increasing concern among our membership and partners about the fundamental flaws in the gender mainstreaming experience to date in EU development and trade policies. Recent NGO work on assessing EU gender mainstreaming polices and practices concludes that institutional changes are needed within the European Commission services to close the gap between policy commitments and effective practice. We therefore asked ourselves some questions: is mainstreaming failing to meet stated development policy objectives? Have subjects of development policies been 'mainstreamed away'? What happens to issues that have not been identified for mainstreaming? Does mainstreaming lead into invisibility? Has gender mainstreaming become everyone's and no-one's responsibility? What is required for mainstreaming to be effective?

We concluded that a new development dynamic, firmly anchored to the human rights perspective and the obligations to duty bearers and rights holders that this entails, is essential if we are to achieve our common goals of equity, equality and a world free from poverty. Lessons from over a decade of gender mainstreaming point to the need for more substantive engagement at Institutional level and from civil society to make mainstreaming an effective strategy that will contribute to gender equality and women's empowerment. Transforming the mainstream can only happen by overcoming unequal power relations and promoting inclusive approaches.

Our meeting affirmed the commitment of the range of non-governmental organisations present from the South and the North to work together and in solidarity to advance this ambitious agenda and to succeed in the future where we have failed in the past. There is a need for greater two-way interaction – for gender equality advocates/activists to ensure that they more systematically incorporate into their analysis the issues of ageing, ability/disability, minorities, children, and for inclusion advocates/activists to ensure that they incorporate gender analysis more systematically into their thinking.

Political will, leadership and resources from the European Institutions are crucial. As we move towards a new and enlarged European Parliament and European Commission in 2004, the Mid-Term Review of the Country Strategy Papers (CSPs), a new regulation on promoting gender equality in development cooperation, and hopes and fears around de-concentration, this report offers fresh thinking on the key challenges, unresolved questions and recommendations to transform the mainstream in development policy and practice.

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Definitions of inclusion and mainstreaming

Inclusion is a *right* enshrined in international instruments, and is linked to non-discrimination as an issue, as part of a body of human rights laws. Inclusion is also *a practice* and *an approach*. It is about bringing the poorest into the centre of debates and decision-making. Inclusive approaches are about actively including marginalised people in all aspects of social, economic and political life.

Mainstreaming is *a strategy* for making women's as well as men's concerns and experiences integral to the design, implementation, monitoring and evaluation of policies and programmes in all political, economic and social spheres so that women and men benefit equally. Gender equality and equity are its goals. Full exercise and enjoyment of all human rights (civil, political, social, economic and cultural) for all women, men and children is the ultimate goal.

Section 1: The critical issues

During the day-long meeting, entitled Everywhere and Nowhere: a Seminar on Mainstreaming and Inclusive Approaches in EU Development Policies, a number of critical core issues emerged from the presentations, the case studies and the debates that followed. These are outlined below, and a more detailed discussion of the points raised can be found in the overview of the presentations and case studies in *Section 2*.

1.1 The challenge of obligation and power relations

An important backdrop to the discussion was the root cause of exclusion and of gender inequality. Unequal power relations and underlying power structures were identified as the basis upon which our society is organised. This has clear implications for mainstreaming specific issues such as gender, and for the inclusion of currently excluded groups. It was agreed that there is a need for much more detailed research and analysis based on community experience and input to transform power relations at different levels – institutionally, within society and among NGOs. Pursuit of gender equity, moreover, should not be perceived as threatening the privileges of men, but as an opportunity to enhance quality of life for all.

There is, however, a danger that mainstreaming can divert resources from communities to the centre and give undue weight to the views of the donors. A specific example was given where donors to one project insisted that 50 per cent of beneficiaries should be men, thus obscuring the basic objectives of the project, which focused on women's empowerment.

Women and men of all ages face multiple levels of discrimination. Exclusion is in part due to the way that society is structured, but attitudes also play a major role. It is not enough to say we are going to be inclusive – there is an imperative to act. The seminar highlighted the need to work on explicit inclusion strategies to combat the various layers of discrimination that currently dominate development work. Very often, however, where poor women, minorities, older women and men, and women and men with disabilities are already 'included', this current 'inclusion' is on very unequal terms. They may, for example, be taken for granted, given low-waged work, or expected to provide unwaged services such as caring for children or other family members.

Excluded people are invisible, and this invisibility is the justification for denying them a role in decisions on policy and the allocation of resources. This leads to a vicious circle of vulnerability, continued exclusion and marginalisation. But many of those who are marginalised have a multitude of survival strategies and capacities and are able to act as change agents. They are therefore central to any poverty-orientated development policy. However, people-centred development policies remain a challenge for bureaucratic institutions.

Lack of conceptual clarity and confusion between gender equity as a goal, and gender mainstreaming as a strategy, has led in the past to the weakening of policy and poor planning. Similarly, greater conceptual clarity is needed in relation to inclusion, and the interrelationship between gender mainstreaming and inclusion strategies. Gender mainstreaming should not be reduced to a technocratic approach but should be developed as a comprehensive framework that

contributes to change, both in society and institutional policies/practices, and as a strategy for women's empowerment.

It was agreed that the basic tenet for transforming the mainstream and promoting inclusion is the rights-based approach. Various participants highlighted the value of rights and the obligation of duty bearers to fulfil those rights. The rights approach should not be in any way mystifying – there are very clear tools and guidelines to support its implementation.

The presentations touched upon a wide range of both generic and specific international and EU instruments on human rights, gender mainstreaming and inclusion. Yet marginalised people, who are often the poorest of the poor, have not benefited from these instruments and continue to be invisible to policy makers. The seminar affirmed the need for European officials and for NGOs working on development cooperation to utilise the normative framework on rights and inclusion in order to deliver compliance. The presentations demonstrated the potential impact of the strategic use of legal and political frameworks at national level with powerful examples from Bangladesh, Guatemala, India, Jamaica, Kenya and South Africa.

Participants proposed a twin-track strategy on mainstreaming. For example, in regard to gender, a dual strategy to mainstream gender should also ensure that specific policies, initiatives and programmes to address gender or women's issues are complementary, and reinforce mainstreaming. The case studies on ageing, disability, and minority rights pointed to the need for similar dual strategies of mainstreaming alongside specific actions in each respective sphere. The triple track approach was also raised as an issue, where a third track targets men's programmes addressing gender issues. Useful illustrations of this work in practice came from India and Bangladesh.

The seminar also made the case for exploring feminism, not only from the perspective of women's equality, but also through the lens of social difference; to examine ways to promote solidarity and strategies to resource this adequately. It was felt that this could be an important catalyst in advancing the gender mainstreaming agenda and promoting inclusion. When a specific problem is complex, mainstreaming can become a very convenient smokescreen that allows a bureaucracy to avoid addressing the issue appropriately. The role of the women's movement in contributing a non-bureaucratic response is vital.

Violence and abuse was a recurrent theme during the day. It was raised in many different contexts – in relation to women and power relations with men, to the neglect of older people and theft from them, to disabled women's 'punishment' for not bringing income into the household, and to widespread corruption, conflict and malpractice in some countries. It was identified as a major priority by several of the participants in the South, and should be visible in policy debates and action plans on gender mainstreaming and inclusive approaches.

The seminar highlighted the need to revisit concepts of mainstream economic theory from a gender perspective, as this is key to influencing and changing macroeconomic and trade policies.

Participants were reminded to reflect on all these issues in Europe, and not only in the South. There is the need to ensure the coherence of internal and external

EU policies, and of core EU Institutional values. The debates around gender and trade in particular served to illustrate that 'we are all in the same boat'. Participants were advised of the importance of working with the women's movement and civil society generally in Europe to ensure that important gender and inclusion instruments are reflected in the new Constitution of Europe. This will play a key role not only in EU internal policy but also in its external policies and practice.

1.2 Participation and visibility

The seminar re-affirmed that equality and equity are prerequisites for sustainable development, poverty reduction, and peace and democracy. A very strong statement was made regarding the importance of identifying and targeting the poorest. The achievement of the Millennium Development Goals (MDGs) and the EU's own primary development objective of poverty reduction will fail unless all sectors of society are reached and included. Discussion took place on the fundamental value of social protection strategies, often seen as 'welfarist', in securing poverty reduction and social development for all. It was pointed out that 80 per cent of older people worldwide are denied state support and their basic right to social protection, and similar statistics apply to disabled and minority groups.

Participants stressed the important principle of integrating gender analysis in policies and programmes focusing on older people, disabled people, and minorities. All sectors need to be integrated into gender policy and programmes and strategic cooperation on cross-cutting issues. It was acknowledged that issues and sectors have been compartmentalised and that NGOs need to work together more effectively on areas of complementarity, avoiding hierarchy or a 'baseball' mentality, where there is rivalry and competition, and focusing on collective work with more impact.

The EU Lisbon Summit in 2000 decided, at EU level, not to work with target groups but rather to take a wider approach to social inclusion and non-discrimination that de facto mainstreamed all groups. Taking the example of older people, however, they are not yet recognised or visible. The Madrid International Plan of Action on Ageing (2002) has not been included in EU texts, and there remains no real strategy for mainstreaming older people, despite the demographic reality of ageing populations.

A recurring theme in all the presentations and case studies was the importance of analyses based on community experience at local and national level, and urgency of disaggregating data and findings by age, gender and exclusion at national and international level. Without access to this crucial factual information, it is impossible to work in a strategic and targeted way. A 'one size fits all' approach is potentially very damaging and costly. Many more resources are needed to identify and target marginalised and vulnerable people and put in place tailored programmes designed to respond to their rights and needs.

Particular emphasis was placed on the poverty and marginalisation created by the HIV/AIDS pandemic. Intergenerational approaches and analyses were explored, indicating the need for policy makers to take full account of reciprocal relationships at the household level, and the rights and requirements of carers

who are dealing with the effects of the pandemic. A clear example is the key role older people play in looking after and supporting young orphaned dependants.

The issue of policy coherence emerged very strongly during the seminar. The challenges around gender mainstreaming and inclusive practices should inform all aspects of development cooperation and human rights compliance. Debt relief, trade, foreign policy, environment, health, food security and agricultural development are linked to sustainable development and the human rights agenda. A detailed presentation on gender and trade highlighted the vital need for advocacy and expertise by NGOs representing excluded groups in these areas. It is important to look at the international political context and macroeconomic policies in order to understand shifts in the above-mentioned policy areas and their impact on the formulation and implementation of EU development strategy and priorities.

The seminar examined the challenges of 'meaningful' participation and consultation with excluded groups at the point where decisions are actually made, and looked at strategies to achieve this. Without investment in information and support for the poor to participate, the process is no more than rhetoric. Participants also discussed how to harness the strength of local capacity and knowledge to get issues on a political agenda. The case studies and presentations offered much food for thought on achieving real voice and visibility at grassroots level and standard setting in this area. A key issue is how to ensure that local realities and national concerns and issues, together with good practice and shortcomings, are fed directly into policy work at European and international level and vice versa.

1.3 Guiding principles for action

Alongside discussion of the current state of play, a number of important proposals and suggestions were made during the course of the seminar on key principles to transform the mainstream. The main ideas are summarised here and developed in *Sections 2 and 3*:

- Policy coherence, synergies and cooperation are needed at institutional level and across the NGO community, focusing on the goal of poverty eradication. Appropriate human and financial resources must match policy commitments and obligations.

- *Policy coherence:* The highest-level decision makers within the organisations must endorse inclusive approaches and gender equality objectives as an institutional priority and make them subject to senior-level accountability. In relation to gender, for example, more emphasis should be placed on support for women-specific projects and programmes as the second strand of the twin-track approach that often gets lost.

- *Synergies:* There is the need to revive the case for specific thematic budgets as a springboard or catalyst to achieve the overall goal of equality for all and earmarked funding in geographic budget lines to advance this work at local and national level.

- *Cooperation and complementarity:* It is crucial to build sustainable relationships with allies within the Institutions and stronger alliances with

other NGOs for collaborative research, analysis, advocacy and programme work on cross-cutting issues such as conflict prevention, human rights and HIV/AIDS.

■ *The role of Institutions:* In developing countries, the EU must make greater efforts to improve timely access by community-based organisations (CBOs) to information, services and decision-makers at individual, organisational and institutional level, in order to ensure transparency. Without this transparency at the appropriate time and 'level', effective consultation – one of the prerequisites for meaningful participation – becomes impossible.

EU Institutions need to define their objectives, targets and indicators and place much more emphasis on performance and results-orientated work. Workable strategies should be developed to ensure accountability and transparency. Effective monitoring tools are crucial, alongside clear mechanisms and procedures to effect change at different levels.

■ *The role of NGOs:* A very important proposal and invitation came from CONCORD (the European NGOs Confederation for Relief and Development) for a structured alliance and collective strategy to build a stronger political influence. Within this debate, an important point was made on the need for a strategic balance between reactive, monitoring work on the part of the NGOs and proactive agenda setting work.

■ Mainstreaming is a long-term process for change and requires a learning environment. Capacity building on gender and inclusion is vital for both NGOs and Institutions to create an appropriate organisational culture, which ensures that mainstreaming and inclusive approaches become intrinsic and central to their activities, not an optional add-on. Staff with expertise in gender, inclusion and human rights should be an integral part of the organisation, and this work should not be farmed out to external specialists.

1.4 In the course of the day the European Commission representatives made the following key points:

■ There is the perception within the Commission and delegations that work on mainstreaming or on specific groups means a shift from the primary objective of poverty reduction rather than a core element in achieving this.

■ There is no real ownership of mainstreaming as yet within the Commission and very few resources for, or prioritisation of, specific excluded groups.

■ New opportunities may emerge with a new Commission in 2004.

■ We must distinguish between the process and the goal. Mainstreaming is a means to an end.

■ Capacity building at country level, supported by clear objectives, targets and indicators, is extremely important. There is the need for more strategic thinking and a pragmatic approach to what we can do to change the situation in the field.

■ The gap between civil society and government seems to be widening in terms of influence and resources in developing countries.

- Gender staff within the Institutions are often placed in non-strategic structures and need to work closely with senior staff to create accountability in the system for gender mainstreaming.

- There is a chronic lack of human resources within the Institutions, which is a major obstacle to mainstreaming.

- The Inter Service Quality Support Group has a leading role in ensuring implementation of policy, for example, in the Mid-Term Review of the Country Strategy Papers. Although the recommendations are not binding, they act as a final quality check at country level.

Section 2: Summary of the seminar proceedings

Helen O'Connell, Head of Policy at One World Action, moderated the seminar. The morning session addressed the issue of 'Including all of the poor in EU development'. The afternoon session focused on 'Closing the Gap: EU gender mainstreaming policies and practices'.

2.1 Morning session: Including all of the poor in EU development

This session explored the urgent need for innovative approaches to the issue of mainstreaming of excluded groups. Southern and Northern-based participants presented case studies covering ageing, disability, children and minority rights.

2.1.1 Including all age groups in EU development policy
Sylvia Beales, Policy Development Manager, HelpAge International

Sylvia Beales set the scene for the inclusion agenda. HelpAge International is working on this question because of its experiences with older populations in developing countries. The numbers of older poor are increasing in countries that have huge difficulties in providing for their poor, and the poorest are often to be found among the old. Yet the older poor are by and large excluded from development programmes that are supposed to focus on alleviating the poverty of the poorest.

Age, as well as gender, is a real factor of discrimination and results in older people's exclusion from both development programmes and political and civil processes. HelpAge International's global network is seeking to support disadvantaged older people wherever they are and to actively promote the inclusion of older people in development programmes. HelpAge International calls this mainstreaming age into poverty reduction.

Research with older people across the world has highlighted the key issues they are struggling with: lack of voice, chronic and endemic poverty, lack of access to basic services, absence of state support and the impact of HIV/AIDS. In countries where the HIV/AIDS pandemic has taken hold, the middle generation is dying and therefore older people, particularly older women, become responsible for bringing up children, often with no support, little information about the disease and poor access to health services.

HelpAge International and its partners are seeking to work collaboratively with a range of governmental and civil society partners to support older people's efforts to roll back the exclusion they face. Particular emphasis is given to ensuring that older people's voices are heard in policy processes and that their rights and roles in the community and household are not overlooked. HelpAge International is working closely, in programmes and policy development, with organisations that work with marginalised groups, such as disabled people, children, women and minority groups.

'Age is a real factor of discrimination and results in older people's exclusion from development programmes and political and civil processes addressing poverty.'

Sylvia Beales went on to outline the case for inclusion:

- Inclusion is a right enshrined in international instruments, and is linked to non-discrimination as an issue, as part of a body of human rights law.

- There is a clear link between the MDGs and inclusion, as is highlighted in the following statement by the UNDP at a seminar in Dar es Salaam in October 2003:
  'Because the Millennium Development Goals are equated to be universal rights, they should be achieved in every country, equally between both male and female genders and for all age groups.'

- Inclusion has social value – evidence shows that a socially inclusive society is more humane, peaceful, just and equitable. The practice of exclusion is very divisive and there is an inherent link between inclusive approaches and social progress.

- Inclusion is associated with sound development policy. If marginalised people are excluded from programmes, it means that we are not doing development very well.

She highlighted the importance of the normative framework for inclusion, recalling human rights agreements and instruments and the great progress made in recent years through the social summits – including the 2002 Madrid International Plan of Action on Ageing, with its central focus on MDG achievement, the right to development, poverty reduction, social change, and social inclusion. The Madrid Plan also acknowledged government obligations to include older people in development programmes.

Both EU development policy and the MDGs include a vision of inclusion, and the Country Strategy Papers (CSPs) and the Poverty Reduction Strategy Papers (PRSPs) are specifically mandated to include the excluded. The Cotonou Agreement endorses the role of non-state actors in consultative processes related to poverty reduction.

The core challenges to inclusion were suggested to be:

- the institutional practice of excluding marginalised groups

- government and civil society failure to reach out to the chronically poor

- poor and excluded people's marginalisation from policy processes

- the failure of gender mainstreaming and lack of commitment to inclusion as a practice and an approach.

Reaching the poorest is the major challenge for poverty reduction processes. From a recent review conducted by HelpAge International of nine African PRSPs in preparation for a United Nations/HelpAge International/Government of Tanzania sponsored pan-African meeting on ageing and poverty, it is clear that the resources available in poverty programmes for all marginalised groups – not just older persons – are very limited or non-existent. Governments are acknowledging this; for example, the Mozambique PRSP states: 'The resources available for targeted social welfare programmes are still very limited and the number of beneficiaries remain relatively small in relation to the problem.'

In the case of older people, there is also minimal participation of the poorest in poverty programme decision-making processes. Their views on how the PRSPs might deliver tangible benefits for them have either not been sought or are largely ignored.

There is also limited targeting of, and lack of specific data on, the poorest – disaggregated by age, gender, ability, and ethnic origins. The response to the older poor is through 'safety net' transfers of food, seeds and some subsidies. Even if there is a minimal budget allocation for safety nets, there are not enough resources allocated to meet the poor's requirements for safety net support.

She questioned why poverty programmes do not provide for income transfer to the poorest, despite evidence from Africa that income transfer is an effective poverty reduction measure. Non-contributory payments to the poor on the basis of age have been shown to contribute to household security, and the costs of schooling, housing, health, transport, food and small business investment.

She outlined some principles for inclusive approaches to poverty reduction:

- Bring the poorest into the centre of poverty and related sectoral consultations.

- Understand the situation of the poorest in their wider context: placing the issues of specific groups within the multiple needs of the poor.

- Acknowledge and act on the entitlements that the poorest have as a group but also as citizens, migrants, refugees and bearers of rights.

- Support and build on contributions and reciprocal arrangements of the poorest at household level, and do not assume dependence.

- Recognise difference and make policy based on information from data disaggregated by age, gender, ethnic origin and ability.

- Urge governments to act on rights and obligations.

- Support civil society efforts to raise the voices of the excluded.

She concluded with a set of recommendations to the European Commission:

- Develop and implement an inclusive and intergenerational strategy in consultation with civil society, with financial commitments.

- Support the poor to input into Country Strategy Papers development, the Mid-Term Review process and related EU policy.

- Improve the EU evidence base on hard-to-reach poor groups, such as by collecting age-disaggregated data.

- Relate funding and policy decisions to human rights obligations.

- Train EU staff on human rights obligations and issues of the poorest.

- Show evidence of poor people's perspectives in national consultation processes.

'It was really important that the older people concerned in the project were able to voice their concerns directly with the policy makers.'

2.1.2 Case study: Older citizens' monitoring in Jamaica – methodology for inclusive policy development
Sharron Nestor, Programme Officer, Caribbean Regional Office, HelpAge International

> Jamaica has a population of 2.6 million, and a geographical area of 4,244 square miles. Its GNP was US$2,690 per capita in 2000. Older people make up 10 per cent of the population, life expectancy is 72 (male) and 76 (female) and the population is ageing. Jamaica is performing well in relation to social development issues but despite this, chronic poverty remains an enormous issue.

Sharron Nestor opened her presentation with a brief profile of Jamaica. One-third of the population lives below the poverty line. Under-employment rather than unemployment is a core issue, with the working poor forming a majority of those living below the poverty line. Poverty levels are higher in rural areas, where 69 per cent of populations are poor. The EU country strategy paper has recognised this shift in the poverty profile of Jamaica, acknowledging that poverty is concentrated among young and older people and is higher in female-headed households. The poor are characterised by low income and consumption, poor access to social services, substandard housing, limited access to water and poor road access.

The government has responded with a National Development Strategy comprising four pillars: economic growth, improving governance, sustainable development and inclusion, to ensure that the poor are appropriately included in social safety net reforms and education and health reforms.

The National Poverty Eradication Programme, approved in 1997, aims to reduce poverty through direct intervention in poor communities, and to increase the effectiveness and efficiency of social security and welfare. It comprises 72 programmes under eight ministries.

Overall, there exists a sound policy framework on ageing in Jamaica; the problem lies with implementation, which is extremely limited due to economic constraints. Despite the fact that Jamaica is a middle-income country, there also remain huge issues of the marginalisation of older people.

The Older Citizens' Monitoring Project is a three-year project that began in October 2002. It involves older people in tracking how local authorities and national government are fulfilling commitments made at the Second World Assembly on Ageing in Madrid in 2002. It aims to ensure that these commitments are translated into public policies and programmes to benefit disadvantaged older people. It is part of an international programme initiated by HelpAge International, involving five countries, that aims to strengthen older people's ability to participate in older people-focused policy making and implementation, and to develop indicators and monitoring systems relating to older people.

In order to engage older people effectively, the audit phase methodology included focus group consultations with four groups of older people. This work, initiated in 2002-3, has revealed a broad range of core concerns among older people, not only confined to income and health, as previously assumed. Their concerns included: inadequate pension provision; complicated public assistance programmes; an inefficient subsidised drug programme; lack of piped water and the cost of accessing social/community water; lack of public transport and the high cost of private taxis; and poor communications – specifically, a lack of telephones, particularly in rural areas. It is interesting to note that subsequently the transport and water programmes were reformed but older people were still excluded from these processes.

Interviews were also held with a wide range of intergovernmental, governmental and donor agencies, to assess their awareness of older people's issues. Quite a positive response was received in general; one example in particular reveals some of the challenges. The Rural Agricultural Development Agency was initially uninterested in the project, until it was revealed that the average age of farmers is 55, and 45 per cent of farmers are over 60.

The Jamaica project was officially launched in October 2003, with presentations from HAI, UN and government representatives. The launch reinforced the importance of older people being able to voice their concerns directly with policy makers. It was revealed that the poverty profile of older people is very different to other groups – that they are very often asset-rich and cash-poor, and poverty programmes must be adjusted accordingly. It was also highlighted that existing poverty programmes only reach a small minority of the older people in need of support and the application of discriminatory criteria, such as being part of a household with a young person. Another major problem that the project has identified relates to access to medical subsidies because of limited numbers of participating pharmacies.

The key outcomes of the project to date are: the strengthening of poor people's ability to participate in national decision-making processes (poverty reduction or eradication plans), to develop indicators to assess whether governments are delivering commitments made at Madrid, and to support the development of older people's groups to monitor the effectiveness of the Madrid Plan on public service budgets.

Future challenges for the remainder of the project include:

- the expenditure pressure on social programmes by strict fiscal policies

- effective implementation of social services

- increasing the role of CBOs/NGOs in local government reforms

- ensuring older people's issues are not subsumed into wider health issues that are currently focused on children and young people (immunisation and HIV/AIDS).

'The inclusion of disabled persons could progress a long way if projects just consulted with disabled people and paid attention to not putting up the barriers that exclude them.'

2.1.3 Case study: Including disability in EU development policy
Sophie Beaumont, European Disability Forum

Sophie Beaumont outlined the European Disability Forum's (EDF) work to date on including disability issues in EU development policy. EDF is the umbrella body of the European disability movement, the independent voice of disabled citizens in dialogue with the EU. EDF's role is to mainstream disability in all EU policy areas – and this approach is also needed towards shaping EU development cooperation policy.

The work of EDF complements that of IDDC, the International Disability and Development Consortium, a self-managing group currently consisting of 16 international non-government organisations supporting disability and development work in over 100 countries globally: EDF has expertise in lobbying the EU institutions; IDDC has expertise in field work on development cooperation and disability.

She outlined the arguments for mainstreaming disability in Development Cooperation. Disabled people exist in every community throughout the world. Anyone can become disabled at any time, and as populations age, disability will be the experience of an increasing percentage of every society. Yet universally, disabled children, women and men lack access to basic human rights, and are marginalised, excluded and discriminated against.

Most disabled people (70 per cent and 85 per cent of disabled children) live in the economically poorer countries of the South, where lack of access to human rights is first and foremost about the right to life, food, water and shelter. Because poverty is both a cause and consequence of disability, some estimates state that as many as one in five poor people are disabled. This would mean that practically every family in a poor community would be directly affected by disability. Yet within development cooperation policy and practice aiming at poverty reduction, disabled people usually remain invisible and excluded.

Even when there is an awareness of the need to include disabled people in development cooperation activities, there is still a lot of misunderstanding about what this means in practice. Many donors assume that it is a highly specialist area requiring many additional resources. Yet the inclusion of disabled persons could progress a long way if projects just consulted with disabled people and paid attention to not putting up the barriers that exclude disabled people.

There are huge costs to society in not considering and including disabled persons that can only be estimated. Poverty reduction, universal primary education, employment and economic targets will never be met unless disabled persons are included. Reconstruction efforts in post-conflict situations need to recognise that the numbers of disabled children and adults increase as a result of conflict, and to include them in the re-building of their society.

She went on to describe EDF's lobby strategy: a twin-track approach is essential in order to make mainstreaming effective. This means that as well as removing barriers within the mainstream, there should also be a specific focus on disability. At policy level, disability should be mainstreamed into general development

policy, and into gender, poverty-alleviation, health and education policies. There should also be specific disability policy (rights-based and promoting inclusion) that goes into more detail. Structurally, 'disability needs to be approached vertically and horizontally within aid agencies'. This means that aid agencies need to raise awareness among *all* their staff, but also appoint people with specific disability responsibility, to ensure the issue does not get lost.

In relation to budgets, mainstreaming needs to be supported by appropriate funding. This could be achieved by allocating a certain percentage of every mainstream budget to disability (the Indian government allocates 3 per cent). In addition, a specific budget is required for activities such as training and awareness raising across the board, providing they exist in order to promote mainstreaming, and not to fund inappropriate 'vertical' projects that promote segregation.

The donor agency needs put into practice what it is recommending in its development cooperation. This includes empowering and supporting disabled people's organisations in the South, where they have a crucial role in lobbying the EU delegations to influence the development of the Country Strategy Papers (CSPs) and work programmes of the delegations. There needs to be information exchange between disabled people's organisations in the South and North to coordinate lobbying strategy.

The main outcomes of EDF's work to date are:

- **Increasing visibility in the European Parliament**

  - Resolution on the rights of the disabled people and older people in ACP countries (2001)

  - Fringe meetings around EU-ACP Joint Parliamentary Assemblies (2001/2002)

  - The Disability Inter-Group of the European Parliament has organised several meetings on development cooperation

  - Increase in the number of references to disability in the EU budgetary remarks

  - European Parliament Resolution on EU Human Rights includes a specific section on disability and human rights.

- **Increasing visibility in the European Commission**

  - Regular contacts are being made with DG DEV, DG RELEX, DG AIDCO and ECHO and closer relations have been developed with these DGs. The first concrete result is the Guidance Note on Disability and Development Cooperation

  - Building awareness in the member states

  - EDF national disability councils have played an important role in liaising with their respective development cooperation ministries to build awareness and support to increase disability issues as a priority in development cooperation.

Key priorities for the European Disability Forum:

- Implementing the European Commission Guidance Note on Disability and Development Cooperation

- Organising disability awareness training of European Commission staff – planned for 2004

- Using the Guideline document to influence the CSPs by examining the extent to which the country programmes are responsive to the needs of disabled persons

- Ensuring that the Inter Service Quality Support Group includes disability in its criteria for reviewing the effectiveness of CSPs

- Influencing the European Commission programme document for the European Initiative for Democracy and Human Rights – EIHDR (2000-2004) – in order that the fifth mainstreaming element will be on disability

- Influencing the Evaluation Unit in charge of evaluating the European Commission's cooperation and development programmes in third countries. It manages evaluation of sectoral policies, for example, education and transport

- Using the EU budget lines on development cooperation to mainstream disability across relevant EU funding programmes

- Developing contacts and building relations with development cooperation NGOs.

2.1.4 Case study: Integrating minority issues into EC policy frameworks: the case of Kenya

Angela Haynes, Minority Rights Group International

Angela Haynes began her presentation by describing minorities as non-dominant communities who self-identify as minorities, as referred to by the UN Declaration on the Rights of Persons belonging to National or Ethnic, Religious and Linguistic Minorities (1992). In the same context, indigenous peoples overlap with minorities. Kenyan minorities include pastoralists, agro-pastoralists, hunter-gatherers and fisher folk.

She outlined the rationale for including minorities in development: minorities are often among the poorest of the poor; minorities are often excluded from the benefits of development initiatives; and minorities are often negatively affected by development interventions. Some minorities face severe discrimination that needs to factored into development programmes.

She went on to describe the principles of the rights-based approach underpinning the work of the Minority Rights Group International (MRG):

■ Focus on the process and substance of development

■ Ensure development respects/protects/fulfils rights

■ Ensure non-discriminatory approaches and redress for discrimination

■ Ensure active, free and meaningful participation of all stakeholders

■ Assess impact

■ Develop effective remedies

■ Ensure the progressive realisation of rights

■ Strengthen the capacity of rights-holders to claim their rights

■ Strengthen the capacity of duty-bearers to respect those rights

■ Work towards the achievement of the MDGs for all sectors of society.

She emphasised that international human rights law should inform rights-based development programmes, and listed the various instruments relating to minorities:

■ The UN Declaration on the Rights of Persons belonging to National or Ethnic, Religious and Linguistic Minorities

■ The ILO Convention concerning Indigenous and Tribal Peoples in Independent Countries, No. 169

■ The International Covenant on Civil and Political Rights (ICCPR)

■ The International Covenant on Economic, Social and Cultural Rights (ICESCR)

■ The International Convention on the Elimination of All Forms of Racial Discrimination (ICERD)

■ The UN Declaration on the Right to Development.

'Minorities are often despised by the rest of society and the severe discrimination they face needs to be factored in to development programmes.'

In terms of challenging policy and practice, She described the research undertaken to set the agenda. Partner-led minority community-focused micro- and macro-studies have been implemented to highlight development issues affecting specific minority communities, including issues relating to the intersection of gender, age and disability. Global thematic issues and good practice papers have also been developed. *(See Appendix III.)*

Training initiatives include a session on minority rights for European Commission staff working on human rights and democratisation in May 2003; and a tailored training programme for development agencies to encourage the inclusion of minority rights issues in policy and practice.

Regarding EU policy engagement, the EC has a policy on indigenous peoples but not on minorities, but there is an EC interest in minority rights in some parts of the world. The Cotonou Agreement provides for ACP civil society consultation and participation.

The strategy for integrating minority rights into the work of the EC includes: identifying minorities that are present; ensuring consultation with non-state actors, including minorities; examining the impact of discrimination; evaluating the impact of work on minority communities; supporting governments to collect disaggregated data; persuading other donors and governments to follow suit, and engaging in dialogue with civil society.

Recent political work focusing on Kenya has included two meetings with the Kenya desk officer in the European Commission in Brussels; MRG and partner participation in Commission meetings; a meeting with EU delegation representatives in Nairobi; the production of a briefing paper to assess the Country Strategy Paper (CSP) framework from a minority rights perspective and a MRG response to the Kenya CSP.

In the assessment of Kenya's CSP, pastoralists and fisher folk were the only minorities mentioned. Disability was mentioned several times, but there was little on gender and youth, and nothing on older people. Discrimination is not acknowledged as a fact for any group. The effect of conflict on minorities was not acknowledged. Non-state actor engagement with the delegation is mentioned but partners did not know about meetings in advance. The focus on agriculture and rural development should benefit the majority of minority communities who are rural-based. Improvement of physical infrastructure, focusing on roads, should facilitate movement of people, goods and access to services, thus benefits rural minorities. MRG is concerned that environmental management policy should not bring minorities into conflict with conservation policies nor deprive them of land.

The assessment highlighted the need for disaggregated data, coordination between the human rights and development aspects of the Commission's work and a stronger role for the Inter Service Quality Support Group.

The hurdles:

- It is difficult for partners to access country delegations – it is easier to access the desk officer in Brussels.

- Delegations need greater sensitisation to needs of minority communities.

- Minorities need more accessible information about the European Commission – for example, deadlines, timetables and work in progress.

- Commission structures are complex.

- More coordination is needed between the human rights and development work of the Commission.

2.1.5 The reality for disabled women in Nicaragua: a response to the three case studies

Rosa Salgado, FEMUCADI, a disabled women's organisation in Nicaragua

Nicaragua is the seventeenth poorest country in the world and 70 per cent of the population does not have access to basic services. The situation of disabled people is particularly difficult, as there is no policy on access for them. Disabled women are especially vulnerable as they encounter multiple forms of discrimination, live in extreme poverty and job opportunities are non-existent. They are often marginalised, as they are unable to contribute to the family income.

Disabled people in Central America are underprivileged, excluded and are not part of the international agenda. The international agencies do not approve of our project as it is women-focused and they would prefer the involvement of more disabled men. For us it was important to focus specifically on women and the discrimination they encounter on the grounds of gender, poverty and disability, and also their oppression and experience of violence.

Work is currently underway to get their situation onto the national agenda, with a campaign focusing on equal opportunities for disabled people, particularly in relation to employment and access to health services. Education is another major area where disabled people experience discrimination. As children, they have no access to basic education, which means no training or work opportunities for young people. Human rights legislation exists but it is not respected and there is no political imperative to improve the situation. FEMUCADI, composed of 2000 women, is working very hard to achieve steps towards integration – our focus right now is violence prevention work at local and national level.

2.1.6 Summary of comments from European Commission officials

Several representatives of the European Commission were present during the seminar and offered some useful insights on the internal Institutional challenges to advance mainstream and inclusion agendas. They affirmed that the challenges highlighted in the three case studies were probably typical, rather than exceptional situations. They described the difficulties of 'selling the case'. One of the key points is the perception that work in this area, or on specific target groups, such as disabled people, means a shift from the Commission's and the Delegations' primary objective of poverty reduction, rather than this being integral to achieving poverty reduction. Disability is not specifically mentioned as an issue for mainstreaming in the EC statement on development policy and the 'responsibility approach' is extremely important. There was a reminder that 2004 will be a year of change in Europe with enlargement, elections for the European Parliament and a new Commission, which will provide an important opportunity to create more resources and more momentum.

'Disabled people in Central America are under-privileged, excluded and are not part of the international agenda.'

The Commission reiterated the fact that mainstreaming is a means to an end, and it is important to distinguish the process from the political goal. Examples were drawn from the World Bank and the International Labour Organization in relation to their own mixed success with mainstreaming.

The need for a three-step approach was explored. The first step is for the European Commission to be more open and ready to consider the needs of diverse groups. The second step relates to building capacity centrally and also among organisations in the countries themselves, in order to engage effectively with sometimes complex, and unpredictable Institutional processes. The third step relates to the Commission being in a position to actively include excluded groups in its work.

The importance of the Mid-Term Review of the CSPs was stressed, particularly in relation to the implementation of the Guidance Notes on Disability and Development, which have had a limited response from the Delegations so far. The potential strategy of developing further guidance notes for individual specific sectors was raised briefly and it was questioned whether this would be effective, or lead to disillusionment within Delegations regarding ever more 'add-ons' to their work.

It was highlighted that it is a mistake to respond to mainstreaming with other abstract concepts. What is needed is strategic thinking and a pragmatic approach: to reflect more about what we can do to change this situation in the field – with clear objectives, targets and indicators. The Commission is undergoing a major cultural change and it is important to introduce the efficiency factor, and a results-oriented approach to achieve mainstreaming.

2.2 Afternoon session: Closing the gap – EU gender mainstreaming policies and practices

The session began with an examination of new ideas on mainstreaming by APRODEV. The APRODEV and One World Action study *Everywhere and nowhere: assessing EU gender mainstreaming policies and practices* concludes that institutional changes are needed within the Commission services to close the gap between policy commitments and effective practice. The session also explored the findings of the OneWorld Action project, Closing the Gap, as well as work done by WIDE in relation to gender and trade.

2.2.1 Everywhere and nowhere: assessing mainstreaming strategies in EU development cooperation
Karin Ulmer, APRODEV

Karin Ulmer underlined the fact that mainstreaming is now a strategy applied to a wide range of important issues. HIV/AIDS, conflict prevention and development into trade are examples from the long list of cross-cutting or horizontal themes. A key question is how the mainstream responds to these issues. She stressed that the objective of mainstreaming gender in other general policies is a radical agenda. It goes beyond adapting policy objectives and their implementation – it means changing perspectives, power relations, paradigms and attitudes. She argued that gender inequality – the construction of unequal power relations – is a central force behind inequality per se in society. This central force is then applied to other groups: for example, ethnic minorities and older people, to justify discrimination. She emphasised that gender mainstreaming is a complex and lengthy task. After a decade of applying a gender mainstreaming strategy, the gender gap is still enormous and ever-increasing.

She stated that complementarity and more strategic alliances are required to achieve changes needed. We need to look for common interests and identify links between gender and other cross-cutting issues such as children's rights, and the environment.

She described how EU policy commitments to gender have resulted in policy evaporation. The Gender Regulation of 1995 recognised the need for a twin-track approach of gender mainstreaming and affirmative action, and the Amsterdam Treaty (1998) identified gender mainstreaming as a general EU competence. The EU development cooperation policy of 2000 recognised gender equality as a goal in itself and not just a means to achieve poverty reduction. Nonetheless, CSPs largely ignore the concept of gender mainstreaming – gender analysis is weak, and as a result, gender responses and budget allocation are marginal or non-existent.

Policy commitments evaporate at programme level and guidelines and other tools and resources remain largely unused. Gender is rarely seen as a priority for political dialogue, and is not pressed by delegations or ACP countries, despite commitments to gender equality in the Cotonou Agreement. The structures in place have resulted in gender being everyone's and no one's priority. Chronic understaffing and limited gender competence, through lack of training in both the European Commission's Headquarters in Brussels, and its Delegations, means that it is failing to deliver on its gender policy commitments. The Inter Service Quality Support Group has recently assessed coherence between gender and development policies, and should play a leading role in developing clear lines of responsibilities and stronger incentives for improved coherence.

'Policy commitments evaporate at programme level and guidelines and other tools and resources remain largely unused. Gender is rarely seen as a priority for political dialogue.'

Amounts allocated in the gender budget line have diminished enormously over the years (halved since 1998), and the current amount, €3 million, is negligible in comparison to allocations for other cross-cutting issues (€100 million for human rights, and €40 million for environment and tropical forests). The absence of gender-disaggregated data makes it impossible to assess or demonstrate the impact of EU funding on different sectors. Member States gender expert meetings and donor coordination at country level should be strengthened, and an open dialogue with civil society organisations, including women's organisations, is urgently needed, especially at country level.

Institutional weakness and lack of political will are major reasons for the stalemate on gender equality. Accountability, institutional support and incentives to work on gender mainstreaming are crucial.

Finally, she posed the question 'Where do we go from here?' De-concentration could be a real opportunity to bring gender issues to the fore on a country-specific basis. Thematic budget lines are still crucial, as catalysts to influence mainstream programmes and geographic budget lines.

She described four key lessons from APRODEV's experience as a mainstream NGO network of development organisations:

■ Decision makers within the organisations need to endorse gender equality objectives as an institutional priority.

■ Gender staff should be an integral part of the organisation. This role should not be farmed out to external specialists.

■ Gender issues should not be perceived as threatening the privileges of men, but as an opportunity to enhance quality of life for all.

■ Gender needs to be linked with other cross-cutting issues: gender and HIV/AIDS, gender and violent conflicts, gender and Economic Partnership Agreements.

From policy to practice – actions by APRODEV agencies in India to promote gender perspectives

Edde Kirleis, EED, Germany

Edde Kirleis began by highlighting the importance of a triple-track approach – the empowerment of women, gender mainstreaming, and working on gender issues with men. The experience of the APRODEV agencies in India proves that these three strategies need to be promoted simultaneously and that sufficient resources need to be provided for all three areas of intervention.

Since the mid-90s, APRODEV has focused on promoting gender transformation in a holistic manner in programmes in India by:

- supporting grassroots activities that aim to change gender relations (awareness raising, women's organisation-building, and programmes working with men and women in changing gender relations)

- supporting gender mainstreaming processes in partner organisations to change their structures and procedures, employing women facilitators to undertake gender training, gender awareness programme analysis and planning, and the development of gender policies through long-term work with selected partner organisations

- supporting activities aiming at state level to change the overall political and legal framework, i.e. through work on family laws, on ratifying and implementing international agreements such as CEDAW and the Beijing Platform of Action and the international hearings on violence against women

- supporting an intensive four-week training course by a feminist organisation for young women working in partner organisations to become change agents within their organisations, and to build a network of gender-aware, feminist NGO women

- providing gender training for the staff and executive level in APRODEV agencies, as well as finalising a reference framework for all APRODEV agencies on gender

- inviting resource persons from the South (two Indian gender specialists) as gender trainers in the North.

There is much gender expertise in the South that the North can learn from – taking gender into account in our institutional structures, providing staff capacity in Europe and not just talking about gender 'out there'. She highlighted the importance of a strategic choice of partner organisation using different reference groups (women, mixed, men) to work on gender issues, and close cooperation with local feminist organisations promoting gender issues in society on all levels, including the political level. These feminist organisations have developed expertise in gender training and gender mainstreaming, and can be accessed by other local partners and enter into a dialogue with APRODEV agencies in the North.

'There is much gender expertise in the South that the North can learn from – taking gender into account in our institutional structures, providing staff capacity in Europe and not just talking about gender "out there".'

'The European Commission and DFID should devote adequate and sustained financial, human and time resources to activities essential to closing the gap between policy and practice.'

2.2.2 Closing the Gap: Putting EU and UK gender policies into practice
Zohra Khan, One World Action

Zohra Khan began her presentation by describing the Closing the Gap project, a three-year programme that started in 2001. It comprised three country studies evaluating the implementation of EU and UK gender policy. The methodology used consisted of a review of policy; interviews with EU and DFID staff (UK Department for International Development); a review of one DFID-funded and one EU-funded project (six case studies); and country consultations. The case studies included the Recognition of Prior Learning project (RPL) in South Africa, a government-funded project on accessing skills; the agricultural commercialisation programme in Nicaragua, focusing on small-scale farmers accessing markets more efficiently; and in Bangladesh, the Adarsha Gram project.

She described the key findings, in terms of comparing policy and practice, as:

- *Poor gender analysis:* The research found that in both DFID and the European Commission gender equality was invoked as a policy priority and included in strategy papers, but there was little analysis of what this means in practice. Sound gender analysis must be based on good gender-disaggregated information.

- *Lack of conceptual clarity:* Lack of gender concepts affects the definition of goals and strategies and can lead to policy evaporation and poor planning. There was confusion between gender equity as a goal, and gender mainstreaming as a strategy.

- The twin-track approach to gender equality is not fully grasped; i.e. the need for complementarity between specific projects addressing gender or women's issues alongside mainstreaming.

- *Policy coherence:* Policy coherence between gender equity goals and other development goals such as poverty reduction are important but there is a risk that gender equality may become an instrumental or secondary objective. In practice, addressing multiple cross-cutting themes means juggling competing priorities. The absence of guidelines on how to prioritise or otherwise accommodate these competing strands can result in gender being diluted or neglected.

- *Weak institutionalisation of gender equality in systems and structures:* This leads to diffused responsibility and under-resourcing. Gender knowledge and capacity is weak and many existing gender mainstreaming tools and resources remain unused. Yet an effective model of gender training does not exist to date.

- *Monitoring and evaluation:* The country studies revealed varying success in relation to monitoring and evaluation of gender policy implementation. Only in Bangladesh is there an established process of gender review feeding into policy strategy development.

- *De-concentration:* This creates new opportunities for innovative context-specific gender work, but also runs the risk of marginalising gender.

- *Involvement of men:* In recent years, the body of knowledge examining the role of men in achieving gender equality has been growing. There is increased pressure on organisations to work with men on gender issues.

- *Dialogue and networking:* In addition to policy dialogue at government level, networking by donors with organisations engaged in gender work is important and needs to be strengthened. The Closing the Gap consultations provided forums for networking and exchange and confirmed the need to enhance existing linkages and build coalitions among civil society organisations, government and donor agencies engaged in gender mainstreaming at national and regional levels.

Recommendations emerging from the study:

- Accountability and transparency should include strengthened accountability systems, processes and procedures and the development of an accountability matrix, definition of expectations of delivery in performance appraisals, work plans and reports; and the development of country-level gender action plans.

- Gender equality goals should be made explicit at policy strategy and operational levels. The relationship between gender equality and other cross-cutting themes should be clarified in policy development processes. Emphasis should be placed on the co-existence and interrelationship of cross-cutting policy priorities. The EU and DFID should strive to maintain coherence between policies on gender equality in development cooperation and the overarching development policy framework within which gender and development policies are located.

- Rigorous, detailed gender analysis should inform all development planning processes and all aspects of programmes and projects should have gender equality goals.

- Policy priorities should be reflected in organisational structures, recognising that achieving gender equality is a political as well as a technical process.

- The European Commission should support their gender mainstreaming strategies by appointing designated staff with appropriate gender skills and expertise at decision-making levels.

- Policy commitments should be matched with resources. The European Commission and DFID should devote adequate and sustained financial, human and time resources to activities essential to closing the gap between policy and practice.

- To inform planning exercises, both the European Commission and DFID should undertake a gender budget analysis of their development cooperation.

- Both the EC and DFID should conduct gender training at both Headquarters and Delegation/country office level.

- Both the European Commission and DFID should undertake monitoring and evaluation at both institutional and project management level. They should consider conducting independent annual gender reviews of their respective development cooperation activities, and intensify efforts around dissemination of best practice.

- The European Commission and DFID should identify key partners in civil society and government and set up formal and informal exchange opportunities in order to enhance dialogue, partnership and networking with non-state actors, particularly diverse women's organisations.

- There are four key advocacy messages: senior-level accountability; policy coherence; matching policy commitments with resources; staffing and capacity.

'We see our roles as 'policy midwives' – translating the legal jargon of legislation into accessible language so that marginalised women can advocate for them.'

South Africa: The Gender Advocacy Programme
Pumla Mncayi, GAP

The Gender Advocacy Programme (GAP), established in 1993, is an independent non-governmental advocacy and lobbying organisation based in the Western Cape where it originated as a grassroots initiative. GAP strives for gender transformation in South African society by lobbying civil society, political structures and decision makers for a gender-just society that will empower marginalised communities, particularly women, to gain social, economic and political equality. This is achieved through research, training and engagement in gender advocacy and lobbying, building capacity, mobilising and linking civil society.

GAP's main aim is to serve as a conduit between key decision makers and marginalised women, seeking to ensure women's equal access to and full participation in power structures and decision making in all levels of government, political parties and trade unions. GAP representatives see their roles as 'policy midwives' – translating the legal jargon of legislation into accessible language so that marginalised women can advocate for themselves. Communication with legislators and policy makers is also crucial to ensure that legislation and state policies reflect the needs of marginalised women.

The crucial issues identified by women are local government and gender, reproductive rights, domestic violence, social policy and gender, women in governance, and women and the media.

GAP aims to facilitate the realisation of gender equality and rights in South Africa through ensuring the effective implementation of gender-related laws and policies, with a particular focus on the impact of HIV/AIDS and poverty on gender-related issues. Mobilising communities involves building relations between key stakeholders, and facilitating collective lobbying. Intervention strategies include: capacity building, training of communities, training of women councillors, leadership courses, gender training with municipalities; and institutional transformation, information sharing and networking, research on a range of local government issues, and consultation. Advocacy and lobbying includes making submissions to parliament during public hearings, engaging with portfolio committees, community discussions and campaign work, notably the 50/50 by 2005 campaign, Women in Their Place.

The core challenges for the future are:

- Lobbying of political parties to adopt a quota system regarding women's representation

- Working with the media regarding their portrayal of women

- Addressing women's internalised oppression through lack of skills and support

- Tackling inadequate support structures for women politicians and inadequate monitoring of women's participation

- Ensuring budgets become 'engendered'

- Struggling to keep gender on the political agenda.

Bangladesh: The experience of Nagorik Uddyog (NU)
Zakir Hossain

Zakir Hossain described the Nagorik Uddyog (Citizen's Initiative), founded in 1995, is an NGO that promotes human rights and good governance with a particular focus on local governance. It is committed to democratising the conventional system of mediation, so as to establish social and gender justice. It facilitates the realisation of rights of women at grassroots level through education on civil rights, human rights and women's rights and by resolving communities and family disputes through mediation. Most commentators identify the failure of local governance as a primary obstacle to the promotion of human rights and access to justice in Bangladesh. As a consequence, local human rights organisations are increasingly turning to alternative dispute resolution mechanisms in their work. NU is attempting to democratise the Shalish system (an informal village community hearing). Shalish plays an extremely important role in ensuring acquiescence to prevailing moral codes of conduct on which rural society is based.

The key lessons and recommendations emerging from the work so far within the projects are:

- It is not enough to disseminate information or educate disempowered groups. Enabling conditions are needed in which people can begin to use their knowledge effectively.

- A fundamental condition is the promotion of more egalitarian dispute mechanisms. These should be based on the existing legal framework and should be sensitive to the interests of the most disadvantaged groups. Work to transform the Shalish must secure comprehensive monitoring and follow-up services to those who seek assistance.

- Elected female representatives are still marginalised politically and socially. To strengthen local-level democracy, elected women representatives must establish greater social legitimacy as human rights activitists and advocates. Trained female *shalishdars* often find they have the knowledge but lack the authority to make a substantial difference. Solidarity and networking among women leaders will help to address this.

- Women who are in community-based or civil society organisations need knowledge and training about the laws that affect their lives.

- Some degree of male resistance is inevitable, making gender sensitivity training for influential males an essential component of access to justice programmes.

'EU trade policies and negotiating positions should be submitted to a comprehensive analysis/review from a perspective of human rights, gender orientation, social justice and environmental sustainability and not simply be guided by economic considerations and interests.'

2.2.3 EU gender and trade policies
Maria Karadenizli, Advocacy and Network Officer, WIDE

Maria Karadenizli explored gender mainstreaming into EU trade policies, and its coherence with the EU development agenda. WIDE's work focuses on a critical review of EU negotiating positions in the multilateral trading system, while looking into the ways in which the trade liberalisation agenda is 'taking over' the EU development policies and cooperation agreements.

WIDE's analysis of the gender impacts of the EU trade agenda challenges the myth that trade liberalisation 'contributes' positively to development objectives, by highlighting the discriminatory consequences that trade liberalisation has on different economies and different classes, social groups and genders in the same economy. In many cases, trade liberalisation reinforces gender biases through gender segregation of labour; informalisation of women's employment through an increase of foreign direct investment; limited access of women to health and education through privatisation of services; unequal access to credit and unequal control of land and property through the commercialisation of agricultural activities; the deprivation of women farmers of their traditional knowledge; and the creation of new forms of poverty and social exclusion.

In this context, the EU trade agenda undermines the development objectives and targets set by the EU itself and the international community – including the MDGs and the Beijing Platform for Action – in different areas, including the eradication of extreme poverty and hunger and the promotion of gender equality and women's empowerment.

WIDE is formulating specific demands for a shift in EU policies and negotiating positions in the multilateral WTO trade negotiations to a gender perspective, and challenges the political framework in which trade policies are formulated and implemented. She also looked at coherence between EU trade and development policies at international and regional level, based on the outcomes of WIDE's work on trade agreements between the EU and Latin American countries.

She examined the Sustainability Impact Assessments (SIAs) as an illustration of the opportunities, constraints and challenges of 'mainstreaming' gender concerns into EU trade policies. SIAs are assessments by external consultants undertaken during a trade negotiation seeking to integrate sustainability into trade policy by informing negotiators of the possible social, environmental and economic impacts.

She outlined fundamental weaknesses with regard both to the SIAs' methodology and the fact that EU trade policies – beyond SIAs – lack a gender analysis. Furthermore, as gender issues and local communities' concerns and voices remain by and large absent from trade policy making and mechanisms, the importance of addressing the issue of democracy and women's participation, both in the different phases of negotiations on trade policies and cooperation agreements as well as in the ongoing assessments, is more evident than ever.

She concluded that gender-mainstreaming policies should consist of concrete policy instruments and mechanisms, while trade and development policies should be assessed on the basis of their outcome and contribution to the objectives of women's empowerment, gender equality and women's rights.

There is an urgent need for a clear and coherent strategy that will include the following steps:

- SIAs should look into the issue of policy coherence between EU development objectives, EU trade policies and the Community Framework on Gender Equality with the participation and involvement of the different RELEX DGs.

- Existing spaces for inter-institutional dialogue on gender mainstreaming policies and good practices among the above-mentioned Commission services should be strengthened. The objective of this 'dialogue' should be the development of a clear and coherent strategy, rather than an exchange of views.

- The role and responsibilities of the Inter Service Quality Support Group and the Inter Service Group on Gender Equality should be further clarified and strengthened in order to examine the coherence and complementarity of development and trade policies.

- The outcome of SIAs should go beyond identifying the impact of trade liberalisation on gender equality and women's livelihoods to include suggestions for policies and follow-up actions in the areas of trade and development that will enhance women's access to resources, and promote their empowerment and their participation in decision-making process over trade agreements.

- 'Institutionalise' full involvement of civil society and women's organisations during all phases of trade agreements (including negotiations, implementation and monitoring).

- Gender mainstreaming strategies should be integrated as a permanent item in the agenda of meetings among EU officials, EU Delegations, national governments' representatives and civil society organisations of the countries involved in negotiations for bilateral and regional agreements with the EU.

2.2.4 The Guatemala experience – lessons learned
Olivier Consolo, the CONCORD representative, referring to the need to be inspired by and replicate good practice, described the model provided by the Guatemalan Delegation. The men in charge of this delegation were open to the gender issue and launched a specific initiative to advance gender mainstreaming. This comprised a designated staff member in charge of gender in the Delegation, a compulsory gender training programme for all of the officials in the Delegation and visiting European experts, a standing technical commission involving public officials, European NGOs, civil society representatives, and Delegation representatives to work together to adapt key papers to the context of the country. There is the obligation for all co-funded projects to hire an expert in gender, to analyse outcomes from a gender perspective. The initial results demonstrated the very low 'gender' impact and showed that target groups were not being reached, justifying an ongoing process of evaluating projects.

When groups of experts are sent on a mission there is the request to include a gender expert, not purely to correct mistakes but also to identify good practices, and ensure this can be disseminated at Brussels level and beyond.

The CONCORD representative concluded that there is the need to send a very specific agenda to heads of Delegation, a kind of menu of possible actions that can and should be carried out.

In response to this intervention, the European Commission representative expressed her interest in learning more about why it works so effectively in the Delegation in Guatemala – whether this is due to the committed personalities involved or due to a systemic change within the organisation. She highlighted the problem that Headquarters does not always knowing what is going on at Delegation level and affirmed her own commitment to disseminate the achievements in Guatemala.

Best practice: eight action points for a three-year strategy:
1. Official and permanent support from the Head of Delegation, who chairs the most important meetings and initiatives

2. Nomination of a Gender Coordinator as a permanent position within the Delegation staff with specific terms of reference

3. Proposal for compulsory training for all project and programme managers (co-directors and coordinators), both for NGO cooperation and official cooperation with government

4. Each project co-financed by the EC to include a permanent gender expert (local or international) to ensure gender mainstreaming in all field activities and strategies.

5. Each Identification and Formulation Mission for official cooperation programmes (with government) to include a gender expert.

6. A permanent Gender Committee chaired by the Gender Coordinator from the EC Delegation and composed of the gender experts of all projects and programmes. This Committee develops proposals and recommendations for the EC Delegation and the Programme Managers, it produces strategic and technical guidelines for the operational staff of EC cooperation, and ensures periodic monitoring of the Gender Diagnostics elaborated by each project and programme.

7. A specific Gender Sub-Commission has been created within the meso-level dialogue process. This process brings together Government, EU Member States, EC, European NGOs and Civil Society to improve coordination, coherence and effectiveness of governmental cooperation in the context of the implementation of the Memorandum of Understanding (MoU). The role of the Gender Sub-Commission is to identify a programme supporting the governmental strategy of Gender Mainstreaming in Public Policies and to ensure mainstreaming in other thematic sub-commissions of the Meso-dialogue.

8. Gender budgeting approaches supported and evaluated for each official cooperation programme of the MoU 2000-2005.

2.2.5 Comments from European Commission officials
One Commission official highlighted the fact that women's organisations and civil society organisations are accessing fewer and fewer resources from both government and the donor community. The gap between civil society and government therefore seems to be widening in terms of influence, role and resources.

She further spoke about the role and position of gender staff within most institutions and the fact that they need to influence its hierarchy in order to create accountability in the organisation. The real barrier is still lack of human resources and to some extent funds – too few people to do a key job of awareness-raising, preparing concrete tools and giving support to colleagues on how to apply them. She talked of the need to revoke the current strategies that actively hinder transformation and to find key entry points to ongoing processes.

The representative from the secretariat of the Inter Service Quality Support Group (IQSG) of DG Development, created during the reform of DG External Relations in 2000 to review the quality of the CSPs, highlighted the efforts towards increased quality and deeper analysis of all cross-cutting issues in the Mid-Term Review and the importance of the seminar's discussion on structural problems together with local experience to feed into this work. She stressed that although the IQSG's recommendations are not binding, they act as a 'last quality' check, and countries are obliged to reply and justify why they do not include certain recommendations. This 'onus of proof' offers important opportunities to influence positively the CSPs.

Section 3: Action points

Participants at the seminar agreed a number of recommendations to transform the mainstream and promote inclusive practices, and highlighted several outstanding political issues.

To transform the mainstream is not simply a matter of including groups who have been excluded, but requires the transformation of the existing paradigm of power relations. We can no longer be naïve about the obstacles that hinder this transformation. Alongside sound and stringent technical strategies we need to pursue a broader agenda through effective political dialogue to achieve equality, equity, sustainable development and participative democracy.

3.1 Action points for the NGO community

1. European NGOs working on development and their partners need to be more assertive in taking forward the normative framework of human rights and ensuring that commitments and obligations are respected and are backed by appropriate resources. This in turn will help to promote complementarity across the range of cross-cutting issues.

2. In tandem, further emphasis should be placed on the strategic use by NGOs of legal and political frameworks at national, regional and local level.

3. In addition to the need for greater conceptual clarity required to work within the Commission and other Institutions, NGOs need to develop further the concepts around the triple track, or even multi-track approach to gender mainstreaming and inclusive practices in order to address different levels of marginalisation. At present, the gender-based triple track, comprising mainstreaming, gender-specific projects involving women, and gender specific projects involving women and men, is not universally applied. Even this triple track approach is too limiting to genuinely include all excluded groups.

4. Relevant NGOs at all levels need to work together more effectively on areas of complementarity and cross-cutting issues, and not compete for resources or political attention. An important step will be to explore the proposal to create a structured alliance within CONCORD to mobilise more effectively on these issues. However, caution is always needed in developing alliances and partnerships within civil society to ensure coherence, bona fide representation and clarity of focus.

5. Stronger links should be established with experts working on economic theory, to ensure that social impact analysis is incorporated into macro-economic policy making. The rights-based perspective should influence positively macro-economic debates, and trade-related policies and decisions.

3.2 Action points for both the NGO community and the Institutions

6. Acknowledging the different experiences of marginalisation – personal, institutional and ideological – there is a need to work on explicit inclusion strategies to combat the various layers of discrimination that are prevalent in the development context.

7. Basic social analyses are required at local and national level, and the disaggregating of data and findings by age, social difference and gender at national and international level, to avoid inaccurate macro-political assumptions and a 'one size fits all' approach.

8. Further institutional work and cooperation with NGOs is needed to promote the intergenerational approach as an effective strategy for inclusion, particularly in relation to the HIV/AIDS pandemic.

9. The role of social protection, and in particular non-contributory state pensions, in promoting inclusive societies, poverty reduction and social development objectives merits greater attention within the EU and international financial institutions. This should also be a campaign issue within the NGO development community.

10. A burning issue is the challenge of achieving meaningful consultation and participation in local communities and the excluded groups within them. A key question is how to ensure that the voices of the excluded are heard and their local capacity and knowledge are harnessed and considered in consultations. Greater emphasis should be placed on exchange of experience and models of good practice across NGOs and Institutions.

11. A formal, open and participative dialogue that includes civil society organisations and women's organisations is urgently needed, in particular at country level. A good illustration of this was the European Commission's announcement at the seminar of a forthcoming consultation meeting on gender and trade. This should be meaningful participation, which does not lead to the sidelining of civil society's concerns.

12. The European Commission should commit itself to training on both gender and inclusion at Headquarters and in the Delegations. Similarly NGOs should commit themselves to training on gender equality and inclusion strategies within their own organisations. The seminar revealed that really outstanding training models do not exist to date, and efforts should be concentrated on training that reaches the highest possible quality standards and impact, and a comprehensive institutional training strategy.

13. A key point made towards the end of the seminar related to the notable absence of European or national-level politicians during the meeting. It was agreed that relevant representatives should be approached with the outcomes to ensure their engagement and active support in future work on transforming the mainstream.

3.3 Action points for the Institutions, in particular, the European Commission

14. In this context, the recommendations emerging from the Closing the Gap study (One World Action) should be taken forward:

- Emphasis should be placed on the co-existence and interrelationship of cross-cutting policy priorities. The EU should strive to maintain coherence between policies on gender equality in development cooperation and the overarching development policy framework within which inclusive gender and development policies are located.

- Gender equality goals should be made explicit at policy, strategy and operational levels.

- The relationship between gender equality and other cross-cutting themes should be clarified in policy development processes.

- Rigorous, detailed gender analysis should inform all development planning processes and all aspects of programmes and projects should have gender equality goals.

15. There should be renewed commitment at the highest levels of the EU Institutions to coherent and consistent implementation of policy commitments. This requires the allocation of appropriate human, time and financial resources, and senior-level accountability. Policy priorities should be reflected in organisational structures, recognising that achieving gender equality and inclusive approaches is a political as well as a technical process.

16. The European Commission should support its gender mainstreaming and inclusion strategies by appointing designated staff with appropriate skills and expertise at all decision-making levels.

17. There is the need for transparent and accessible information and consultation processes that build in sufficient time for networks and local NGOs to respond to initiatives from the European Institutions.

18. Strengthened accountability systems, processes and procedures are crucial. These require the development of an accountability matrix; the definition of expectations of delivery in performance appraisals, work plans and reports; and the development of country-level gender and inclusion action plans.

19. Inclusion strategies and gender mainstreaming should be integrated as a permanent item in the agenda of meetings among EU officials, EU Delegations, national governments' representatives and civil society organisations of countries involved in bilateral or regional agreements/negotiations with the EU.

20. The European Commission should undertake independent monitoring and evaluation from an inclusion and gender perspective at both institutional and project management level.

21. The role and responsibilities of the Inter Service Quality Support Group and the Inter Service Group on Gender Equality should be further clarified and strengthened in order to examine the coherence and complementarity of development cooperation with policy arenas such as trade, and the inclusion and gender agenda.

22. A mechanism should be found to disseminate examples of good practice on inclusion and gender mainstreaming – such as the Guatemala Delegation's investment in gender mainstreaming – throughout the EU and International Institutions and Delegations.

Appendices

Appendix I: Everywhere and nowhere: A seminar on mainstreaming and inclusive approaches in EU development policies

20 November 2003

Programme

Chair: Helen O'Connell, One World Action

Morning session: Including all of the poor in EU development?

Introduction: Including all age groups in EU development policy
Sylvia Beales, Policy Development Manager, HelpAge International

Case studies

Older citizens' monitoring in Jamaica
Sharron Nestor, Caribbean Regional Office, HelpAge International

Including disability issues in EU development policy
Sophie Beaumont, European Disability Forum

A rights-based approach to integrating minority issues into policy
frameworks: case study of policy in Kenya
Angela Haynes, Minority Rights Group International

Round-table discussion with civil society and officials from the European Commission and
the ACP Secretariat

Closing the Gap, Nicaragua,
Rosa Salgado, FEMUCADI, Nicaragua

Best practices for gender mainstreaming in EU development policy,
Helen O'Connell, One World Action

DG Development, Human and Social Development:
Marco Loprieno (gender equality, children's rights, older people's issues)
Tomas Niklasson (disability, health)

Afternoon session: Closing the Gap: EC gender mainstreaming policies and practices

Conceptual and institutional challenges to EC gender mainstreaming
Eva Joelsdotter-Berg, DG Development, Gender Equality Desk

Everywhere and nowhere: Assessing gender mainstreaming strategies in EC development
cooperation from an NGO perspective
Karin Ulmer and Edde Kirleis, APRODEV

Putting policies into practice: Closing the Gap
Examples from case studies in Bangladesh, Nicaragua and South Africa
Zohra Khan, One World Action
Pumla Mncayi , GAP, South Africa
Zakir Hossain, Nagorik Uddyog, Bangladesh

Focus on a policy area: Example of EU gender and trade policies
Maria Karadenzli, WIDE

Summary, conclusions and closure
Helen O'Connell, One World Action

Annex II: Resources

ACP-EU Joint Parliamentary Assembly, *Resolution on health issues, young people, the elderly and people living with disability*, ACP-EU 3398/02/fin, Cape Town, March 2003

APRODEV, 'Table summarising some aspects of the ACP Country Support Strategies', Brussels, August 2003

APRODEV, *EPAs – What's in it for women? – A gender-based impact assessment study on women in Zimbabwe: Issues in future trade negotiations with the EU*, Brussels, 2002

APRODEV, *Rapid survey of 40 ACP Country Support Strategies – What about participation of civil society?* Brussels, August 2002

S Beales, *Obligation and inclusion: a look at EU development policy and practice*, HelpAge International, discussion paper for BOND EU Assembly, 4 July 2003

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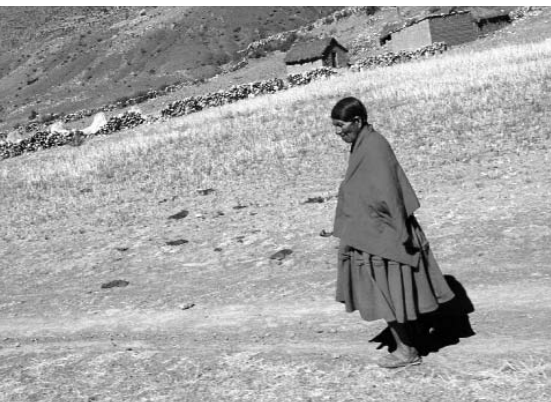
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WIDE, *Instruments for gender equality in trade agreements: European Union-Mexico-Mercosur,* WIDE-GEM-CISCSA-CIEDUR, Brussels, December 2001

WIDE, *International trade and gender equality: A gender analysis of the trade agreements between the European Union and Latin America: Mexico and Mercosur,* WIDE-GEM-CISCSA, Brussels, September 2001

WIDE, *Promoting a development agenda through trade? A critique of the EU position in WTO negotiations from a gender perspective*, Brussels, July 2003