

Gendered Poverty and Social Change:  
An Issues Paper  
Shahra Razavi

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## ◆ Summary / Sommaire / Resumen

### *Summary*

This paper argues that the interlinkages between gender and poverty have, until recently, escaped careful analytical scrutiny. At one level, the relationship between gender disadvantage and poverty appears to be quite straightforward: women (or female-headed households), it is very often argued, suffer more from poverty than men (or male-headed households) in numbers and/or in intensity. This particular approach has been prominent in aid agency writings on “gender and poverty”, which have used social and/or economic indicators to capture poverty outcomes. An exclusive focus on poverty outcomes, however, very often means that the processes leading to poverty are either overlooked or otherwise analysed through regressions or correlations of a few variables abstracted from a far more complex scenario wherein a wide range of institutions interact. It also, inevitably, means that gender will be dealt with through a process of disaggregation — either of households, using the gender of the “household head” as the stratifier, or of individuals, differentiating males and females — which is analytically limited. Moreover, sweeping generalizations about female disadvantage (in mortality, nutrition, education) need to be revised in view of the contradictory findings of detailed studies of gender bias in well-being outcomes, which show incredible diversity not just across different regions, countries and localities, but also across social class, and over the life cycles of men and women.

A somewhat different understanding of the gender/poverty interface is therefore adopted and developed, drawing on some of the existing gender and development writings on the subject, as well as on a number of papers commissioned by UNRISD. This understanding begins from the position that the gender analysis of poverty is not so much about whether women suffer more from poverty than men, but rather about how gender differentiates the social processes leading to poverty, and the escape routes out of destitution. An understanding of the causal processes leading to poverty has important policy implications: it raises important questions about whether it can be assumed, as is often done, that the kinds of policies and asset interventions that can strengthen the position of poor men are going to have much the same impact on poor women.

Methodologically, the paper highlights some of the potential strengths of both (a) the “capability” framework, and (b) “participatory” approaches in capturing gender bias. But it also notes: (a) the intractable data problems in the area of social indicators (on which the capability framework relies), as well as the difficulties involved in making meaningful comparisons between male and female well-being when men’s and women’s bodies are so different in form and function; and (b) that while the potential is there for non-survey, participatory techniques to produce dynamic accounts of gendered poverty, whether this potential is realized in practice largely depends on how they are used. It also suggests that despite the serious data deficiencies and methodological difficulties involved in using household-based measures of income or consumption to arrive at individual levels of well-being, some understanding of household (and preferably individual) opulence may be useful. This is particularly the case when analysing the gender dimensions of poverty, given the complex (and contextually varied) ways in which opulence/poverty (along with many other factors) impact on women’s livelihood strategies and the degree of autonomy they enjoy within familial and conjugal

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spheres. It is also argued that the “entitlements” framework may prove useful in focusing poverty analyses on the social forces and institutions implicated in the creation and perpetuation of poverty — after relaxing its excessively legalistic view of the rules of entitlement. This revision would provide some analytical space for considering individual and collective attempts to subvert, bypass or ignore the rules and norms that entitle people differently and unequally — an actor orientation that is very often missing from structuralist accounts of poverty.

Two critical components of the current agendas for poverty alleviation — land rights/tenure security and “labour-intensive growth” — are explored from the point of view of gendered poverty trajectories. The issue of land rights for women has figured prominently on both donor and feminist agendas. But policies in this area need to be wary of a number of issues: (a) not only are there stark differences in how women in different regions relate to land, but there are also critical gender differences in how men and women in the same locality relate to land, with women’s ability to function as fully acting subjects in relation to property being less than that of men, and mediated through her relationships with men; (b) given local power structures, the pursuit of tenure security can in practice end up entrenching existing inequalities in access to land by formalizing informal rights and registering them in the names of household heads (and richer and well-connected ones at that), unless poorer women can be organized effectively to engage with and make use of the formal structures and legal opportunities that are put in place; (c) even where women’s provisioning roles, as well as their engagement in production for the market, are socially recognized, as in sub-Saharan Africa, land tends to be valued as a resource in gender-specific ways and farming does not always define women’s interest in land; and (d) while for some women in sub-Saharan Africa discriminatory inheritance laws and poor land access are significant constraints, only in a minority of cases is inadequate access to land because of an inability to secure usufruct rights by itself a cause of poverty.

The current policy consensus on poverty, which vehemently maintains that labour-intensive growth is pro-poor, presents a number of serious problems — both from a poverty perspective and, particularly, from the point of view of poor women. First, labour-saving technologies that reduce drudgery can be valuable for both men and, especially, women in smallholder households, who strive to reduce the effort-intensity of their work, and also given the important interlinkages between the physical burden of work and well-being. The policy obsession with extracting work from the poor, which is being validated through the New Poverty Agenda, thus needs to be viewed with concern since it may not provide much of an escape from poverty. The emphasis on agriculture as the sector that can produce labour-intensive growth in sub-Saharan Africa is also open to question, given the increasing importance for the rural poor of “straddling” different economic options when the returns to farming are so pitiful. In fact, food security considerations very often push farmers into casual labouring on a daily basis, which effectively diverts their labour from their own production and becomes an important part of the dynamic of impoverishment. This is not meant to endorse the global policy prescriptions for the agricultural sector, which condemn in advance any attempt by the public sector to intervene in agricultural markets through protective tariffs, quotas and subsidies. Nor is it meant to suggest that the off-farm sector, or the urban labour market, can be a panacea for poor women. The social and poverty implications of women’s entry into the manufacturing labour force have been

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highly context-specific, opening up a Pandora's box of diversity in modes of domination and resistance.

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## *Sommaire*

Selon ce document, les rapports entre sexospécificité et pauvreté échappaient, récemment encore, à une analyse attentive. A un certain niveau, le rapport entre l'inégalité sexuelle et la pauvreté semble tout à fait évidente : les femmes ou les ménages dirigés par des femmes, affirme-t-on très souvent, souffrent plus de la pauvreté que les hommes (ou les ménages dont le chef est un homme), que cette souffrance soit mesurée quantitativement ou qualitativement. Cette optique domine surtout dans les écrits des organismes d'aide consacrés au thème "hommes, femmes et pauvreté", qui se servaient d'indicateurs sociaux et/ou d'indicateurs économiques pour dégager les conséquences de la pauvreté. Mais ne s'intéresser qu'à ces conséquences, c'est très souvent soit négliger les processus qui conduisent à la pauvreté, soit les analyser à l'aide de régressions ou de corrélations de quelques variables extraites d'un scénario beaucoup plus complexe qui est le résultat d'interactions entre toute une gamme d'institutions. De plus, cela amène inévitablement à traiter des rapports sociaux entre hommes et femmes au travers d'un processus de désagrégation — des ménages, en utilisant le sexe du "chef de ménage" comme paramètre de stratification, ou des individus en distinguant les hommes des femmes — ce qui est une démarche analytique limitée. De plus, il conviendrait de réviser les généralisations du type "les femmes sont défavorisées par rapport aux hommes (en matière de mortalité, de nutrition, d'éducation)" vu les résultats contradictoires fournis par les études très approfondies dont on dispose sur les distorsions sexospécifiques des statistiques relatives au bien-être, résultats qui montrent une incroyable diversité, non seulement d'une région, d'un pays et d'une localité à l'autre, mais aussi d'une classe sociale à l'autre et selon les moments de la vie des hommes comme des femmes.

Ce document adopte donc une conception quelque peu différente de l'interface sexe-pauvreté, en s'appuyant sur les travaux réalisés à ce sujet par ceux et celles qui s'intéressent aux femmes et au développement, ainsi que sur diverses études commandées par l'UNRISD. Cette conception a pour point de départ l'idée que l'enjeu de l'analyse de la pauvreté par sexe est moins de savoir si les femmes souffrent plus de la pauvreté que les hommes, que de savoir comment les trajectoires sociales aboutissant à la pauvreté et les voies permettant d'y échapper se différencient selon que l'on est homme ou femme. Il est important pour les responsables politiques de comprendre les processus qui sont à l'origine de la pauvreté; une telle compréhension amène à se demander — et la question est importante — si l'on peut partir de l'hypothèse, comme on le fait souvent, que les politiques et interventions financières capables de renforcer la position des hommes pauvres ont le même effet sur les femmes pauvres.

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S'agissant de la méthodologie, le document met en évidence certaines des forces potentielles que présentent à la fois (a) l'approche des "capacités" et (b) les démarches participatives pour ceux et celles qui veulent cerner l'étendue des distorsions sexospécifiques. Mais il constate aussi (a) des problèmes insolubles de données dans le domaine des indicateurs sociaux (sur lesquels repose l'approche des capacités), ainsi que la difficulté de faire des comparaisons valables entre le bien-être masculin et le bien-être féminin alors que les formes et fonctions des corps masculin et féminin sont si différentes; et (b) que s'il est possible d'employer des techniques participatives qui ne relèvent pas de l'enquête pour faire apparaître une image dynamique de la pauvreté selon le sexe, la concrétisation de ces possibilités dépend dans une large mesure de la façon dont elles sont exploitées. Il laisse à penser aussi que, malgré les sérieuses insuffisances de données et les difficultés méthodologiques liées à l'utilisation de statistiques de revenus ou de consommation des ménages pour mesurer le bien-être individuel, il peut être utile de comprendre ce qu'est la richesse des ménages (et mieux encore des individus) lorsqu'on analyse les dimensions sexospécifiques de la pauvreté, étant donné la complexité (et la diversité contextuelle) des façons dont la richesse ou la pauvreté (et bien d'autres facteurs) se répercutent sur les stratégies de survie des femmes et sur le degré d'autonomie dont elles jouissent à l'égard de leur famille et de leur mari. L'étude explique aussi que les droits dont jouissent les individus peuvent se révéler un bonne grille d'analyse en obligeant à s'intéresser aux forces et institutions sociales qui contribuent à engendrer et à perpétuer la pauvreté, pour autant que s'adoucisse le regard excessivement légaliste que cette grille fait porter sur les règles régissant l'ouverture de droits. Cette révision ouvrirait à l'analyse un champ qui lui permettrait de prendre en considération les tentatives faites par les individus et les collectivités pour subvertir, contourner ou ignorer les règles et normes qui président aux différences et à l'inégalité des facultés humaines. Or cet intérêt pour les acteurs fait très souvent défaut dans les études structuralistes de la pauvreté.

Les droits fonciers ou la sécurité de jouissance et la "croissance à forte intensité de travail", qui tiennent actuellement une place importante parmi les mesures préconisées dans la lutte contre la pauvreté, sont examinés du point de vue des trajectoires différentes qui conduisent hommes et femmes à la pauvreté. La question des droits fonciers pour les femmes figurent en bonne place à l'ordre du jour des donateurs comme des féministes. Mais les politiques en la matière doivent s'inquiéter d'un certain nombre de questions: (a) les rapports des femmes à la terre varient nettement d'une région à l'autre mais ils varient aussi entre hommes et femmes d'une même localité, les femmes ayant moins que les hommes la faculté de régir pleinement leurs biens, et devant en outre passer par les hommes pour ce faire; (b) tant que les femmes pauvres ne peuvent pas s'organiser efficacement pour s'adresser aux structures officielles et se servir d'elles et des possibilités offertes par la loi, la recherche de la sécurité de jouissance peut, étant donné la structure du pouvoir au niveau local, se traduire en pratique par un renforcement des inégalités existantes dans l'accès à la terre, les droits officiels étant officialisés et enregistrés au nom des chefs de ménage (en priorité des plus riches et des mieux placés); (c) même si le rôle de fournisseurs des femmes et la part qu'elles prennent à la production marchande sont socialement reconnus, comme en Afrique du Sud, hommes et femmes ont tendance à porter des appréciations différentes sur la terre comme ressource et l'intérêt que les femmes portent à la terre ne se définit pas toujours en termes agricoles; et (d) si, pour certaines femmes d'Afrique subsaharienne, des lois successorales discriminatoires et un accès à la

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terre très limitée sont d'importantes contraintes, cette inaccessibilité de la terre qui les empêche de s'assurer le droit à l'usufruit n'est une cause de pauvreté que dans une minorité de cas.

Le consensus politique actuel qui soutient avec véhémence qu'une croissance à forte intensité de travail est favorable aux pauvres pose un certain nombre de problèmes graves, du point de vue des pauvres en général mais plus particulièrement du point de vue des femmes pauvres. Tout d'abord, les technologies qui épargnent la main-d'œuvre réduisent aussi le travail pénible, ce qui n'est pas à négliger pour les hommes ni surtout pour les femmes des ménages de petits exploitants qui s'efforcent de réduire l'intensité de l'effort dans leur travail, compte tenu aussi des rapports importants entre charge de travail physique et bien-être. C'est donc avec inquiétude qu'il faut considérer l'acharnement des politiques à faire travailler les pauvres — acharnement qu'ils justifient par les nouvelles mesures préconisées dans la lutte contre la pauvreté (le *New Poverty Agenda*) — car c'est une solution qui ne préserve guère de la pauvreté. L'accent mis sur l'agriculture comme secteur capable de générer une croissance à forte intensité de main-d'œuvre en Afrique subsaharienne est aussi contestable, étant donné l'importance cruciale que revêt la diversification des options économiques pour les pauvres des campagnes lorsque les exploitations agricoles sont si peu lucratives. De fait, des considérations de sécurité alimentaire amènent très souvent des exploitants agricoles à s'engager comme journaliers, ce qui a pour effet de priver leur production de leur propre travail et joue un rôle important dans la dynamique de paupérisation. Il ne s'agit pas ici d'adopter en bloc les recommandations faites au niveau mondial au secteur agricole, qui condamnent d'avance toute tentative du secteur public d'intervenir sur les marchés agricoles au moyen de droits de douane protectionnistes, de quotas et de subventions. Il ne s'agit pas non plus de faire croire que la panacée pour les femmes pauvres se trouve hors de l'exploitation agricole, dans le travail en ville. Les conséquences sociales de l'entrée des femmes dans l'industrie manufacturière et son incidence sur la pauvreté ont été étroitement liées au contexte, et cette entrée a suscité des modes de domination et de résistance aussi divers que les maux répandus par Pandore sur la terre.\*

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\* Traduit de l'anglais par Martine Cullot.



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## *Resumen*

De acuerdo a este documento, los enlaces entre la distinción por género y la pobreza han escapado, hasta hace poco, a un cuidadoso análisis. En un nivel, la relación entre la desigualdad por razón de sexo y la pobreza parece algo muy claro: se afirma con frecuencia que las mujeres (o los hogares donde la mujer es la jefa de familia) sufren más la pobreza que los hombres (o los hogares encabezados por los hombres), ya sea en número, en intensidad o en ambos. Tal enfoque ha tenido prominencia en los escritos sobre “distinción por género y pobreza” publicados por los organismos de ayuda, los que han utilizado indicadores sociales y/o económicos para captar las consecuencias de la pobreza. Pero, centrar la atención exclusivamente sobre las consecuencias de la pobreza, significa a menudo que se han ignorado los procesos que conducen a tal, o se han analizado con la ayuda de regresiones o correlaciones de algunas variables extraídas de un escenario mucho más complejo, dentro del cual toda una gama de instituciones actúa recíprocamente. Esto significa inevitablemente también, que la distinción por género se tratará mediante un proceso de desagregación — las unidades familiares que utilizan el papel asignado por razón de sexo al “jefe del hogar” como parámetro de estratificación, o los individuos que diferencian entre el hombre y la mujer — lo que constituye un planteamiento analítico limitado. Además, habrá que examinar las generalizaciones relativas a que las mujeres son desfavorecidas (en términos de mortalidad, nutrición y educación), a la luz de las conclusiones contradictorias que han aportado estudios detenidos sobre los prejuicios sexistas encontrados en las estadísticas del bienestar, que muestran una diversidad increíble no solamente de un país a otro, o de una región, o de una localidad a otra, sino que también de una clase social a otra, y a lo largo de los ciclos de vida de hombres y mujeres.

En este documento se adopta un pensamiento un tanto diferente sobre la interconexión sexo/pobreza, y se aprovechan algunos de los escritos sobre el tema que han realizado aquellos que se interesan en la mujer y el desarrollo, así como también varios estudios encargados por UNRISD. Este pensamiento parte de la base de que en el análisis de la pobreza por razón de género, no se trata tanto de averiguar si la mujer sufre más pobreza que el hombre, sino que más bien, cómo se diferencian, según la distinción por género, las prácticas sociales que llevan a la pobreza, y las vías que permiten escaparse de tal. Es importante que se comprendan los procesos que originan la pobreza ya que éstos repercuten en la determinación de las políticas: suscita preguntas importantes sobre si se puede presumir, como a menudo se hace, que los tipos de políticas e intervenciones financieras que pueden fortalecer la posición de los hombres pobres, pueden tener un efecto semejante sobre las mujeres pobres.

En cuanto a la metodología, el documento pone de relieve algunas de las fuerzas potenciales que presentan al unísono: a) el enfoque de ‘capacidad’, y b) los métodos ‘participativos’ para captar los prejuicios basados en el género. Pero también comprueba: a) los problemas insolubles de los datos en el terreno de los indicadores sociales (en el que se apoyan los enfoques de capacidad), así como también las dificultades que se presentan al hacer comparaciones significativas entre el bienestar masculino y el bienestar femenino, siendo el cuerpo de la mujer y del hombre tan diferente en forma y funciones; b) que, si bien el potencial es evidente para que las técnicas participativas que no llevan a cabo encuestas produzcan una imagen dinámica de la pobreza generada, para que este potencial se concrete en la práctica, dependerá en gran parte de cómo se explote. Asimismo

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invita a pensar que, pese a la seria deficiencia de datos y dificultades en la metodología que se emplea para medir los ingresos y el consumo por hogar, para alcanzar el bienestar individual, podría ser de gran utilidad entender en alguna medida la opulencia de la unidad familiar (y de preferencia la opulencia individual); especialmente cuando se analizan las dimensiones de la pobreza por razón de sexo, dado las formas complejas (y diversidad contextual) en que la opulencia o la pobreza (junto con muchos otros factores) repercuten sobre las estrategias de supervivencia de la mujer y el grado de autonomía de que disfrutaban al abrigo de sus familias y cónyuges. El estudio explica también que los derechos de que disfrutaban los individuos pueden probar útiles para orientar la atención de los análisis de pobreza hacia las fuerzas sociales y las instituciones implicadas en la creación y la perpetuación de la pobreza – tras distender su mira excesivamente legalista de la normativa sobre los derechos. Esta revisión ofrecerá algún espacio analítico para considerar intentos individuales y colectivos para derribar, desviar o ignorar las reglas y normas que rigen las diferencias y las desigualdades de las facultades humanas. Una orientación protagonista muchas veces ausente en los estudios estructuralistas de la pobreza.

Los derechos agrarios o la seguridad de tenencia y el ‘crecimiento sustentado en el uso intensivo de la mano de obra’, que constituyen dos componentes críticos de las agendas actuales en su lucha por mitigar la pobreza, se examinan desde el punto de vista de las trayectorias que conducen a hombres y mujeres a la pobreza. La cuestión de los derechos agrarios de las mujeres ha figurado con prominencia en las agendas de los donantes y de los grupos feministas. Pero las políticas pertinentes necesitan tener en cuenta varias cosas: a) no solamente existen severas diferencias en la relación que tienen las mujeres con la tierra en diferentes regiones, sino que también hay diferencias críticas por distinción de género en la relación que hombres y mujeres tienen con la tierra en la misma localidad, dentro de lo cual las mujeres están menos facultadas que los hombres para dirigir sus bienes, y deben actuar por intermedio de ellos; b) dadas las estructuras de poder locales, la búsqueda de seguridad de tenencia puede en la práctica reforzar las desigualdades presentes en el acceso a la tierra, con la conversión de los derechos oficiales en inoficiosos y registrándolos bajo los nombres de los jefes de familia (con prioridad para los más ricos y con mejores contactos), a menos que las mujeres pobres se organicen eficientemente para tomar parte en las estructuras oficiales y aprovecharlas, así como las oportunidades que la ley ofrece; c) incluso cuando el papel de proveedoras que desempeñan las mujeres, así como su participación en la producción comercial, se reconocen socialmente, como es el caso en el África subsahariana, la tierra tiende a valorarse como un recurso con relación a la distinción por género, y en términos agrícolas, éstos no definen los intereses de las mujeres en la tierra; y d) si bien para algunas mujeres en el África subsahariana, las leyes de sucesión discriminatorias y el escaso acceso a la tierra constituyen restricciones importantes, solamente en una minoría de los casos, el acceso inadecuado a la tierra por no poder asegurar los derechos de usufructo, constituye una causa de pobreza.

El consenso político actual que sostiene con vehemencia que el crecimiento sustentado en el uso intensivo de mano de obra favorece a los pobres, presenta varios problemas graves, desde la perspectiva de la pobreza, pero especialmente desde el punto de vista de las mujeres pobres. Primero, las tecnologías desarrolladas para ahorrar mano de obra que reduce el trabajo fatigoso, pueden ser de valor para los hombres, pero en especial para las mujeres con hogares en

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pequeñas explotaciones, quienes batallan para reducir la intensidad del esfuerzo en su trabajo, también dada la importancia de la relación entre la carga física del trabajo y el bienestar. La obsesión política de hacer trabajar a los pobres, validada por la Nueva Agenda sobre Pobreza, necesita por ende examinarse con esmero, puesto que es probable que no ofrezca un escape a la pobreza. El énfasis en la agricultura como el sector que puede producir la intensidad de mano de obra en el África subsahariana, también se cuestiona, dada la crucial importancia para la posición ambigua en que se encuentran los campesinos pobres ante la diversidad de opciones económicas, cuando los ingresos derivados de la agricultura son tan lamentables. De hecho, las consideraciones de la seguridad alimentaria a menudo empujan a los cultivadores a desempeñar a diario trabajos de carácter temporal, que tienen el efecto de privar su producción de su propia mano de obra y a la vez se torna en una parte importante de la dinámica del empobrecimiento. Esto no significa que hay que adoptar en su conjunto las recomendaciones globales para el sector agrícola, que condena de antemano cualquier intento del sector público de intervenir en los mercados agrícolas mediante aranceles proteccionistas, cuotas o subvenciones. Como tampoco quiere decir que la panacea para las mujeres pobres se encuentra fuera de la explotación agrícola o en el mercado laboral urbano. Las implicaciones sociales de las mujeres en la industria manufacturera y su incidencia en la pobreza han estado estrechamente vinculadas al contexto, y esta entrada a suscitado modos de dominación y resistencia, tan diversos como los males que salieron de la caja de Pandora y se repartieron por el mundo.\*

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La primera fase del proyecto de investigación de UNRISD sobre **Distinción por género, pobreza y bienestar**, fue llevada a cabo con el apoyo de la Agencia Sueca de Cooperación Internacional para el Desarrollo (Sida) y del Programa de las Naciones Unidas para el Desarrollo (PNUD). UNRISD agradece a los gobiernos de Dinamarca, Finlandia, México, los Países Bajos, Noruega, Suecia y Suiza, su aportación al financiamiento básico del Instituto.

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\* Traducido del inglés por Isolda Montero.

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## ◆ Abbreviations and Acronyms

HPI	Human Poverty Index
NTEC	non-traditional export crops
PA	Poverty Assessment (World Bank)
PPA	participatory poverty assessment
PRA	participatory rural appraisal
SAP	structural adjustment programme
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNICEF	United Nations Children's Fund

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# INTRODUCTION\*

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Although there are now relatively wide-ranging bodies of literature on gender and on poverty, it is arguable that the interlinkages between the two have not been adequately analysed.<sup>1</sup> At one level, the relationship between gender disadvantage and poverty appears to be quite straightforward, as in the tendency to equate women, or female-headed households, with the vulnerable or the poor. Such a perception underpins development agency arguments about the “feminization of poverty”, and the frequent references to women as “the poorest of the poor”. In these policy discourses three strands of thinking stand out: first, the equation of female headship with poverty (Jazairy et al., 1992); second, assumptions about anti-female discrimination within the household and consequent female disadvantage in well-being (UNDP, 1995); and third, synergistic arguments positing a positive relationship between “investing in women” and meeting developmental objectives such as poverty reduction or fertility decline (World Bank, 1994). But at a deeper level, the gender analysis of poverty is not so much about whether women suffer *more* from poverty than men (in numbers and/or in intensity), but rather about *how* gender differentiates the social processes leading to poverty. Critics argue that in the process of assimilating gender into their policy discourse, development institutions have screened out the differentiated and highly contextualized understanding of poverty which has been central to gender analysis. As Jackson puts it, “. . . ‘feminization of poverty’ has come to mean not (as gender analysis would suggest) that poverty is a gendered experience, but that the poor are mostly women” (1996:491).

The question that arises with some urgency is: Why does gender appear in aid agency discussions of poverty in such generalized, and problematic, forms? One of the arguments of this paper is that there are both methodological and political reasons for this which need to be clearly understood because of their implications for future poverty measurement and analysis, as well as for policy formulation aimed at gender-sensitive poverty reduction. At the same time some new ways of problematizing the gender/poverty interface need to be elaborated which can illuminate the ways in which both the trajectories leading to poverty, and the escape from destitution, are gendered phenomena. A gendered understanding of poverty also raises some difficult questions about whether it can be assumed, as is often done, that the kinds of asset interventions that can strengthen the position of poor men are going to have much the same impact on poor women.

To take this project forward, the present paper — which draws on the existing gender and development literature as well as a number of papers commissioned by UNRISD<sup>2</sup> — makes contributions at two inter-related levels. First, it provides a

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<sup>1</sup> There is, however, an emerging analytical literature on the gender/poverty interface. See, for example, Jackson, 1996; Kabeer, 1996; IDS, 1997.

<sup>2</sup> Full references for the papers commissioned by UNRISD (Gonzalez de la Rocha, 1998; Jackson and Palmer-Jones, 1998; Kabeer, 1998; Kasente, 1998; Kynch, 1998; Lockwood and Whitehead, 1998; Razavi, 1998; Saith and Harriss-White, 1998; Sen, 1998; Sudha and Rajan, 1998; Walker, 1998) can be found in the bibliography. Some of these papers will be published in the UNRISD Discussion Paper series.

critical and selective assessment of the attempts to measure gender disadvantage through a wide range of indicators of well-being. It considers how measurable, affordable and reliable these indicators are in identifying gender bias, and suggests that some indicators may be more sensitive in picking up gender bias than others. It also asks questions about what these indicators mean in different social contexts, what kinds of contextual information would be needed to facilitate their interpretation, and whether they can reveal the causal processes leading to poverty and gender bias.<sup>3</sup>

An enquiry into these causal mechanisms, in turn, leads to a second set of questions about how women and men in particular social contexts relate differently to important assets such as land and labour, given the significant ways in which their livelihood strategies are distinct. To explore these issues, the social institutions within which production and distribution take place, and their “unruly”<sup>4</sup> practices, rules and norms, are scrutinized. In order to get away from the determinism that has tended to pervade some structuralist analyses of social institutions, particular attention is paid to how women (and men), in specific settings, understand these rules and norms, and how their perceptions in turn feed into the positions they adopt in implicit and explicit instances of contestation and negotiation in the conjugal arena, as well as vis-à-vis employers, community leaders and local government officials.

One of the main themes emerging from this review, and the commissioned papers on which it is based, is that gender analysis can illuminate the diverse processes leading to poverty, and thereby enrich its analysis. But at the same time, it is also true that without a properly contextualized understanding of how poverty is created and reproduced, it will not be possible to comprehend the ways in which gender shapes, and differentiates, those causal processes (Lockwood and Whitehead, 1998).

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## MAKING GENDER VISIBLE: SOME METHODOLOGICAL “TRAPS”

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At the conceptual level, poverty is increasingly seen as a multi-dimensional phenomenon, which includes market-based consumption (or income), as well as the public provision of goods and services, access to common property resources and the intangible dimensions of a good life such as low levels of disease and crime, clean air, dignity and empowerment.<sup>5</sup> The proponents of the conventional approach argue that the income/consumption measure is still the best single proxy for poverty since it can incorporate non-market goods and services (state-provided education and health) and a wide range of other utilities (clean air, democracy) and

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<sup>3</sup> The issues relating to indicators are touched upon very briefly here. A comprehensive and in-depth analysis of conventional well-being indicators is available in Saith and Harriss-White, 1998, and of indicators of autonomy/empowerment in Kabeer, 1998.

<sup>4</sup> The term “unruly practice” is taken from Fraser, 1989, and is used here to highlight the ways in which rules, norms and practices that characterize different institutional arenas can be subverted, ignored or bypassed in explicit and implicit instances of resistance by the less powerful social actors. For a similar usage see Gore, 1993 and Kabeer, 1997.

<sup>5</sup> One should note that adding new dimensions to the definition of poverty will automatically increase its observed extent and depth.

disutilities (noise, pollution), through “shadow prices”, into a monetary equivalent that is easy to compare over time and across contexts. But their critics argue that common property resources and state-provided commodities have usually been ignored in practice, and the consumption of non-traded goods has also been underestimated (Baulch, 1996). It is also questionable whether “shadow prices” can meaningfully translate the different kinds of values that are embodied in non-market goods and services into monetary equivalents that are comparable.

The tension between income/consumption methods and alternative approaches also revolves around their different claims to knowledge and the different methodologies employed for assessing levels of poverty and well-being. The income/consumption method determines levels of well-being and ill-being in an *a priori* fashion, as physical needs deprivation through private consumption shortfalls measured on the household. It is not necessary to repeat here the wide-ranging debates about the poverty line and the head-count measure of poverty.<sup>6</sup> It is useful, however, to note in passing that despite the claims of some of its proponents, the substantive content of the poverty budget<sup>7</sup> tends to include an important relative and “cultural” element besides an absolute subsistence element; thus the poverty line in the United States is between 10 and 17 times higher than that in India (depending on the exchange rates used), although both pretend to be absolute in some sense (Scott, 1981). Even in cases where most of the household budget is spent on food, the minimum subsistence element cannot be adequately ascertained nor can it be priced in a consistent manner, since it cannot be assumed that the poor face the same prices as the non-poor (or that they consume the cheapest available kinds of food). There is thus an inevitable degree of arbitrariness about where the poverty line is drawn, and the proportion of population that is classified as poor. In practice, it is not uncommon for political considerations to dictate where the line is drawn (Scott, 1981).

But a more fundamental drawback of the income/consumption method is the unreliability of the data on which it is based, especially in developing countries. In most African and Latin American countries, household budget surveys tend to be one-off (non-repetitive) exercises, which makes them unsuited as a device for monitoring poverty. This is ironic in view of the claims made by the proponents of the income/consumption approach that the superiority of their methods lays precisely in their ability to make comparisons of poverty over time. As Lustig (1993) has observed, even if a researcher is willing to work with surveys that have less than a complete definition of income, there are only five countries, out of close to 30 in Latin America, for which an analysis of poverty in the 1980s can be made. This gives some indication of the scale of the problem.

In contrast to the conventional approach, what have become known as participatory approaches to poverty determine both the constituents and the sources of well-being through an iterative process involving the PRA (participatory rural appraisal) facilitator and participants. These participatory approaches have a long pedigree, going back to the traditions of participatory action-research and the work of Paulo Freire and his followers, and have gained greater elaboration and international recognition through the work of Robert

<sup>6</sup> The head-count measure of poverty is the proportion of the population/households that falls below a certain pre-determined poverty line.

<sup>7</sup> “Poverty budget” refers to the minimum amount of income required by an individual or household in order to remain above the poverty line.

Chambers. In the late 1980s and early 1990s this “confluence of older streams of research together with new inventions evolved as a family of approaches and methods known as participatory rural appraisal (PRA)” (Chambers, 1998:xv). Participatory methods for information generation are often open-ended, visual (using mapping, diagramming and matrices) as well as verbal (discussing and debating). Their proponents claim that participatory methods of research and policy analysis enable the local people — including the poor, illiterate, women and the marginalized — themselves to appraise, analyse, plan and act.

There has been a long-running debate about the claims made by the proponents of PRA that their methods in effect “hand over the stick” to the local people themselves. Critics point out that PRAs involve highly formal and “public” social events, which construct “local knowledge” in ways that are strongly influenced by existing social relationships marked by significant class and gender hierarchies (Mosse, 1994). Questions have also been raised over any expectations that poor village people willingly divulge truthful and accurate information in one-off “participatory” research exercises, as well as the possibility of developing a model of participation in one place and then applying it elsewhere much more quickly (Jackson, 1997a). There are also some fundamental questions as to whether subjective perceptions of ill- and well-being can, on their own, reveal all that there is to know about individual welfare, given the ideological (including gender) parameters within which all perceptions take shape (Sen, 1985). Sen is particularly concerned about what he calls “physical condition neglect” to which women may be even more prone than men, and thus insists on including physiological conditions in accounts of well-being.<sup>8</sup>

The “capability framework”, pioneered by Amartya Sen (1985), is based on an alternative notion of well-being directly concerned with a person’s quality of life, which embraces both basic “functionings”, such as longevity and adequate nutrition, as well as more complex ones such as freedom and autonomy. In practice the proponents of this approach have tended to concentrate on the first set of functionings, which are measurable on the individual through a range of social indicators.<sup>9</sup> They have therefore used “objective” criteria for assessing well-being. But rather than using income or consumption to determine how individuals fare they look at the actual outcome for individuals in terms of mortality, malnutrition, educational levels and other “basic needs” indicators. Far fewer assumptions thus need to be made in the interpretation of results than do household-based measures of income or consumption. We will not dwell on some of the shortcomings of the capability framework here, since they are discussed at some length later, but note in passing that data problems are as debilitating in the area of social indicators, on which the capability framework relies, as they are in the case of economic data.

It is frequently argued that from a gender perspective, these alternative concepts of poverty are useful in that they allow a better grasp of the multi-dimensional aspects of gender subordination, than a focus purely on household income levels. It is worth remembering that these conventional household surveys (of income, or consumption) have been an Achilles’ heel for gender analysis; even with complex

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<sup>8</sup> It should be noted that Sen’s concern with physical condition neglect is formulated in the context of his general critique of utilitarian approaches to well-being rather than to participatory approaches as such. But given that both utilitarian and participatory approaches rely on subjective perceptions of well-being, his critique is equally applicable.

<sup>9</sup> See Carter, 1996 for a critique of Sen’s work on freedom.



econometric manoeuvrings it has not been possible to make these data sets answer questions about intra-household distribution that they were not originally designed to address.<sup>10</sup> However, despite the methodological difficulties involved in reading individual levels of poverty from household-based measures of income and consumption, it is arguable that some understanding of levels of material deprivation — even if it is household-based — may be useful for the gender analysis of social indicators, or of autonomy and subordination.<sup>11</sup> In fact some of the more interesting questions and hypotheses that have been raised about anti-female bias (in terms of nutrition, survivorship and decision making), relate precisely to the ways in which poverty, opulence and social class impact on discriminatory forces and women's personal autonomy and independence in diverse contexts.

Both donor agencies and governments, however, continue to rely, *almost exclusively*, on household surveys to generate easily quantifiable measures of poverty (income, expenditure, consumption), while case study material and other qualitative evidence are sidelined as “anecdotal”. A telling illustration of this methodological bias appears from Lockwood and Whitehead's (1998) analysis of the World Bank's Poverty Assessments (PAs).<sup>12</sup> But the relevance of their argument extends to the technocratic circles of other donor agencies, as well as recipient states engaged in the measurement and analysis of poverty (Marcoux, 1998; Robb, 1998).

Most World Bank Poverty Assessments begin by asserting the multi-dimensionality of poverty, but ultimately, it seems, all give priority to an income and/or consumption definition, a “money-metric” poverty line and a quantitative estimate of the percentage of people in poverty. Lockwood and Whitehead (1998) see this as a fundamental methodological choice, since it locks the Poverty Assessments into reliance on expenditure data from household surveys, which in addition to being narrow, are also very often unreliable and non-comparable. There is little consistency, for example, between different PAs in how the poverty line is established, which means that both cross-national and time-series comparisons are difficult to make. Such methodological inconsistency effectively defeats the purpose of collecting quantitative data, since one of the rationales for using quantitative data is precisely that they are comparable (Lockwood and Whitehead, 1998; Hanmer et al., 1997). At the same time, many of the potential insights about the nature of impoverishment, or poverty processes, which emerge from the participatory research are either marginalized or dropped from the analysis. The reliance on household expenditure data also means that one of the easier ways to make gender visible is by dividing the households into male-headed and female-headed ones, given that the characteristics of household heads (their gender, age, etc.) are invariably collected through these surveys and form a ready basis for sorting the data.

<sup>10</sup> See Hart, 1997 for a critique of the claims made by those using collective models of the household to “recover” intra-household sharing rules from survey data.

<sup>11</sup> As such, therefore, we would agree with those who have queried UNDP's new (1997) composite index on poverty, the Human Poverty Index (HPI), for not including some measure of income/consumption in the index, which they argue is contrary to common sense and everyday experience even in very poor countries (Lipton, 1997; Krishnaji, 1997).

<sup>12</sup> These Poverty Assessments are country studies carried out by the World Bank in order to examine poverty. See Lockwood and Whitehead, 1998 for further details.

The tendency to equate female headship with poverty has, however, been queried on both empirical and methodological grounds (Chant, 1997; Lloyd and Gage-Brandon, 1993). In contexts where male gender identity is maintained by siphoning household resources away for personal consumption (drinking, going out), female heads of households may be in a better position to protect priority consumption areas (i.e., food and health) than women in male-headed households, as the evidence from urban Mexico seems to indicate (Gonzalez de la Rocha, 1998). In other contexts, households headed, *de facto*, by women seem to be less poor than male-headed households because of the remittances they receive from migrant males (Kennedy and Peters, 1992).

The trajectories leading to female headship are clearly divergent. But by lumping together these distinct categories of households, generated through different social processes (e.g. migration, widowhood, divorce), and constructing a simple dualism between male-headed and female-headed households, it becomes impossible to interpret the evidence in a meaningful way. At the same time, the identification of certain types of female-headed households — such as lone widows — as poorer begs the question of why some widows end up living alone while others do not. As Lockwood and Whitehead (1998) put it, the characteristics of the poor say very little about the reasons why they have become impoverished, and it is methodologically incorrect to treat these characteristics as independent variables. In this particular case, they argue, the chain of causation may run the other way: it may very well be that it is poor widows whose children leave the household (through labour migration, for example) and that when more economically secure women are widowed they do not end up living alone. In practice, causes and effects always interact and do so differently in diverse contexts of time and place, and it is unhelpful to think that the ambiguities of causality can be resolved by simple correlations and regressions of a few variables.<sup>13</sup>

As was noted above, a somewhat different conceptualization of the gender/poverty nexus focuses on well-being outcomes, such as life expectancy or nutritional status, implicitly equating gender analysis with the gender disaggregation of social indicators. In recent years social indicators have gained increasing legitimacy in policy debates. The UNDP's annual **Human Development Report**, intellectually buttressed by the capability framework, has no doubt had a significant and positive influence at this juncture. This has given greater visibility to some social sectors (health, education), as well as to gender equity and political participation, even though the efforts to translate the renewed sensitivity to social concerns into sectoral and macro policies remain seriously constrained due to political impediments at both the global and national levels.

From a gender perspective, as many have argued, because these “beings” and “doings” (Sen, 1985) are measured directly on the individual, they are conducive to making gender inequalities visible. It has thus been possible to take on board feminist critiques of the unitary household model without having to resort to problematic assumptions about intra-household distribution. Not surprisingly, the framework has inspired a large body of feminist research on well-being outcomes, documenting significant and sometimes alarming incidence of sex bias (Sen, 1992). However, the gender disaggregation method, which is also partly driven by

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<sup>13</sup> This point was made convincingly by Solon Barraclough of UNRISD in a personal communication.

data availability (albeit of social indicators rather than household income), while useful for revealing gender bias in well-being *outcomes*, is limited in the kind of *causal* analysis of gender difference that it can generate. Moreover, there is also a problematic tendency, when assessing indicator values, to assume cross-cultural and ahistorical female disadvantage. The existing empirical evidence, however, cautions against such sweeping generalizations.

Sudha and Rajan's (1998) analysis of Indian sex ratios at birth for the period 1981-1991 provides further evidence of "gender cleansing" (Harriss-White, 1998) on the sub-continent. In some parts of India parents seem to be adding pre-natal sex selection techniques to traditional post-natal ones to create a "double jeopardy" for their daughters, thereby exacerbating the "missing females" predicament.<sup>14</sup> Their findings, based on an analysis of Indian census data, are corroborated by newspaper reports, case studies and literature from NGOs and women's groups campaigning against prenatal sex determination and female foeticide, to produce a fairly reliable account of the increasing spread and "acceptability" of these techniques. But these patterns are far from uniform. The excess masculinity of sex ratios at birth is concentrated especially in the north and north-west of the sub-continent, and in the urban areas of some central states. The southern states appear to have on the whole normal sex ratios at birth — a regional contrast with some historical precedence that has been the subject of intense debate and theorizing (Bardhan, 1974; Dyson and Moore, 1983; Miller, 1981). *But* while sex ratios at birth show the most masculinity in the north and north-west, and this increasing masculinity is not a nationwide phenomenon, sex ratios of child mortality definitely show *increasing female disadvantage* over all of India. Only one or two very small areas of the country show less female disadvantage in 1991 than they did in 1981, while areas in the south that had normal mortality ratios in 1981 show female disadvantage in 1991.

Nor does female disadvantage in early age survivorship imply a consistent pattern of anti-female bias in food intake and nutritional status as is often assumed. Even in north and north-western India, where the evidence of discrimination against young girls in terms of survivorship is most compelling, "rogue" findings from nutritional surveys not infrequently show that adult women fare better than their male counterparts (Harriss, 1990; Lipton and Payne, 1994). Jackson (1996) suggests that these assumptions of universal female disadvantage may be "partly a consequence of too ready an acceptance . . . by researchers of articulated nutritional norms as reflecting actual food access without any interrogation of how women's agency subverts norms, e.g. by snack-food consumption, by eating during food preparation and by consumption of 'leftovers'" (p. 496). But given the fact that nutritionists are normally required to sort out and account for food intake through snacking, these "errors of omission" may have more to do with the practical difficulties of capturing "individual consumption" and "snacks", because they tend to be forgotten by respondents when the "recall method" is used. Confirming the problematic nature of these generalized assumptions of female disadvantage, Saith and Harriss-White's (1998) comprehensive review of the micro-level literature for South Asia reaches the conclusion that the evidence on

<sup>14</sup> There is similar evidence of increasing masculinity of sex ratios at birth for parts of East Asia (China and South Korea, in particular), where pre-natal sex determination techniques and selective abortion of female foetuses are also implicated (see references in Sudha and Rajan, 1998).

gender differentials in nutritional status is inconclusive, showing no consistent indication of gender bias.

An interesting instance of the inconsistency is captured in Kynch's (1998) village-level study of nutritional status in the north-western Indian state of Uttar Pradesh. Here age and gender interact in complex ways over the life cycles of men and women. Starting with female nutritional disadvantage during childhood, the pattern is reversed among child-bearing couples where adult men seem to be the ones at greater risk of illness or low working ability, because of thinness. Male disadvantage in this particular context is explained by the compulsions on husbands to "provision" their families, which among the agricultural households means undertaking effort-intensive farm work (ploughing and digging) with consequent threats to their physical well-being. A related point is raised by Kasente (1998). Somewhat contrary to the stereotypical view of gender divisions in Ugandan agriculture, which upholds a caricature of women as over-worked victims and men as lazy patriarchs, her village-level evidence shows substantial labour contributions by male household members to smallholder farming, and a gender division of labour that is visible but "much less sharply than has been assumed" (p. 8).

Kynch's (1998) analysis, in particular, echos the point made vehemently by Jackson and Palmer-Jones (1998) that while time use studies have been of great value in making women's work visible, it is important to resist the conflation of all forms of activity other than sleep as "work", and to recognize how male gender roles in divisions of labour can also involve vulnerabilities for specific groups of men. They argue that an explicit concern with the content and character of work — its *physical arduousness* in particular — may better illuminate the gendered connections between work and well-being for women and men. In fact, in poor households effort-intensive work (high energy expenditure) can, more often than inequitable food intake, be the cause of differences in adult anthropometry; in these cases after adjusting for energy expenditures, energy intakes are often equitable.

These authors also raise some thorny methodological questions about gender-disaggregation, and the difficulties of making meaningful comparisons between male and female well-being when men's and women's bodies are different in form and function. One problematic area, highlighted by Saith and Harriss-White (1998), is that of morbidity, where a significant proportion of the conditions that cause morbidity are sex-specific and defy simple male/female comparisons — reproductive health problems being the most glaring example. Other diseases may be sex-specific due to genetic predispositions, such as rheumatoid arthritis in females, and more controversially, tuberculosis in some male populations such as in India (Dyson, 1984). Another area — explored by Jackson and Palmer-Jones (1998) — is that of physical work capacity. They argue that women and men are *differently* capable of high physical work intensities, which have both direct and indirect connections with their well-being, and which cannot be captured through the metric of time. However, even in other areas such as malnutrition, meaningful comparisons can only be made once "norms" and "cut-off points" (both deeply contested) have been adjusted for gender difference — a process that is fraught with difficulty (Saith and Harriss-White, 1998; Kynch, 1998).

The point of raising these issues here is to highlight the methodological controversies (and arbitrariness) involved in making well-being comparisons between men and women — issues that tend to be overlooked when global comparisons are made. In the broader scheme of things these technical problems are merely the tip of the iceberg. As those familiar with this field have repeatedly argued, social indicators are probably as unreliable and non-comparable as are income data (Solon Barraclough, personal communication). Very few developing countries, for example, have comprehensive and reliable vital registration systems from which demographic data can be obtained — India being perhaps an exception. And even for those with complete vital registration systems the estimates of mortality and life expectancy produced by international agencies may not be accurate because of the overuse of model life tables (Murray, 1991). UNICEF admits that many of the statistics used for estimating under-five mortality are based on mathematical models rather than recent measurements (1993:8). The same applies to sex differences in mortality, which are very often assumed from a particular family of model life tables rather than estimated directly from real patterns in the data (Murray, 1991). Even for an apparently straightforward indicator like literacy there are few up-to-date estimates; in 1994, for example, for 19 of the 145 (including developed) countries, there were no data on adult literacy since 1970, and for 41 more the data related to a year in the decade 1970-1979 (Srinivasan, 1994). If these data realities are taken seriously, then a number of implications will follow.

Critics suggest that these weaknesses and qualifications need to be reflected in data presentations in order to highlight the true extent of the data gaps (Murray, 1991). It also means that “practical” issues such as ease of measurement and costs of measurement (being affordable) — discussed in Saith and Harriss-White’s (1998) paper — are central to the whole project of developing suitable indicators, especially for developing countries. They argue that a disaggregated under-10 female-male ratio (0-4 years and 5-9 years) appears to be a suitable gender-sensitive indicator of well-being, especially for South Asia. But the difficulties with data collection and interpretation reduce the reliability of indicators of nutrition and morbidity.

Data users also need to be realistic about the extent to which findings and policy recommendations that rely on correlations and regressions, between education and income, for example, without enough complementary contextual information can be trusted. A pertinent example is the human capital argument for “investing in women” — a related, and to some extent overlapping, strand of thinking on gender and poverty that has been embraced and developed most enthusiastically by gender advocates in the World Bank (World Bank, 1994). It has also made its imprint on the Bank’s Poverty Assessments, as well as on the so-called “New Poverty Agenda” set out in the 1990 **World Development Report** (World Bank, 1990). The arguments, which are by now fairly well known, suggest that “investing in women is critical for poverty reduction, it speeds economic development by raising productivity and promoting the more efficient use of resources; it produces significant social returns, improving child survival and reducing fertility; and it has considerable intergenerational payoffs” (World Bank, 1994:22). Female education, in particular, is considered to be more efficient than male education in increasing child and household welfare, as well as having broader social returns.

According to Lockwood and Whitehead (1998) the World Bank's analyses of gender gaps in primary education in sub-Saharan Africa are either purely economistic (about expected future returns) or they are anodyne (both "parental reluctance" and "gender bias" cited in one of the PAs on Uganda is so self-evident as to be virtually meaningless). These analyses, they argue, provide an extremely partial and misleading picture of the causal dynamics behind low levels of female education in sub-Saharan Africa. In this connection they also make the critical methodological observation that the relationship between female education and household income may be spuriously being read as causal, when both income and education may be affected by underlying patterns of wealth organized through families, i.e., social class. The alternative hypothesis, which sees educational outcomes as the result of patterns of wealth and poverty rather than the other way around, seems to be more consistent with the qualitative evidence on causes of poverty that is documented in the PAs. It is interesting that a similar conclusion emerges from Saith and Harriss-White's (1998) review paper based on their reading of the limited micro-level analyses of female education for South Asia and sub-Saharan Africa. They suggest that "family poverty in rural and urban areas is probably the most important reason holding girls back from school or withdrawing them earlier" (p. 39). They also make the interesting observation about sub-Saharan Africa that the "same factors that are considered responsible for gender equity in nutrition and health care may be responsible for anti-female bias in enrolment in school, i.e., the higher economic worth of girls and women" (p. 39).

The main message here, again, is that it is impossible to interpret the interlinkages between female education and poverty (income levels) through correlations and regressions alone. But this kind of over-reliance on simple econometric techniques is not limited to international policy-making institutions, government statistical bureaux, or even economists using conventional household surveys (of income and consumption). A similar weakness marks some of the emerging micro-level feminist research, which uses interview techniques to capture different aspects of female autonomy such as intra-household decision making, mobility in the public sphere and even domestic violence. As Kabeer (1998) usefully illustrates, here too the results can be uncontextualized, single-stranded and difficult to interpret, with a heavy reliance on simple correlations and regressions using a few variables. It is arguable that the methodological problems and the difficulties of interpretation are even more daunting in this kind of research. Indicators not only compress a great deal of information into a single statistic, but also embody assumptions about what this information means. And in the case of complex and culturally embedded notions like autonomy, it is impossible to have any faith in whether or not the indicator means what it is intended to mean without contextual evidence to support the assumptions that are being made.

Several contributors to this debate highlight the need for cross-checking and "triangulation" if the estimates and analyses that are arrived at are to inspire any confidence — this is not a new insight (Scott, 1981), but bears reaffirming in view of its significance to poverty analyses. This is presumably the reason why participatory research techniques have been included in the World Bank's Poverty Assessments; their proponents argue that "multi-stranded approaches are more robust than single-stranded approaches such as a free standing household survey" (Holland et al., 1998, cited in Lockwood and Whitehead, 1998:17). But this raises many difficult and unresolved questions about what the relations between different

methodologies should be, and how conflicting results should be handled or reconciled (Baulch, 1996).

These questions are taken up by both Kabeer (1998), and Lockwood and Whitehead (1998), whose contributions provide some insights into this difficult methodological area, as well as some useful suggestions for future research. On the basis of a very detailed and critical analysis of existing micro-level research, Kabeer offers a framework for assessing women's empowerment, which entails checking of different kinds of evidence across three different dimensions of power: "resources" (defined broadly to include not only access, but also future claims, to both material and human and social resources); "agency" (including processes of decision making, as well as other — less measurable — manifestations of agency such as negotiation, deception and manipulation); and "achievements" (well-being outcomes such as longevity, education, etc.). These three dimensions, she argues, are indivisible in determining the meaning of an indicator and hence its validity as a measure of empowerment. Lockwood and Whitehead argue that qualitative data and existing case studies need to feed into definitions and analyses of poverty in particular country settings and not be used simply to illustrate points derived from survey data, which basically turns current practice on its head. There is little evidence, however, that the Poverty Assessments are actually tackling these questions in a sustained manner; instead the non-quantitative, non-survey type of information that the "participatory" exercises are able to produce appears to "sit very uneasily within the Poverty Assessments" (Lockwood and Whitehead, 1998:17).

A related point worth bearing in mind is that there is nothing intrinsically dynamic about non-survey techniques (as opposed to the conventional, large-scale household surveys). They can be used to produce quite static accounts of poverty. One example is the tendency to use the results of the participatory Poverty Assessments to construct what Lockwood and Whitehead (1998) refer to as "a composite picture of the poor", which basically suggests that the poor are those without clothes, money or food, but says very little about why they suffer from deprivation. The point made about participatory methods, namely that they can be as gender-blind or gender-aware as their practitioner (Kabeer, 1996), also applies to the static/dynamic distinction. The potential is there for these non-survey techniques to produce a dynamic account of poverty, but whether this potential is realized in practice largely depends on how they are used.

The need for "contextual" analyses, which is reiterated by these authors, hints at some of the inherent and fundamental limitations of indicators, and highlights the need to supplement data from indicators with other kinds of information. This point is succinctly captured in the **Report on the World Social Situation**, which notes that "social as well as economic indicators can provide no more than partial and incomplete glimpses of the complex and sometimes contradictory realities that determine and shape the quality of life of both individuals and societies" (United Nations, 1993:117). These "glimpses" say very little about *how* — through what social and institutional mechanisms — different social groups come to enjoy, or alternatively be deprived of, these valuable capabilities. A similar point is reiterated by Saith and Harriss-White when they argue that the comparative use of indicators of well-being, while necessary for revealing bias, "discloses nothing about their social meanings or about the social processes giving rise to gender differentials" (1998:54). For example, while the main reason for the relatively

poorer educational attainments of males in Southern African countries (Botswana, Lesotho, Namibia and South Africa) is thought to be early school-leaving and migration to search for work in mines and commercial agriculture, the same cannot be said for the Latin American and Caribbean countries or countries in other regions (such as Sri Lanka, the Philippines, Qatar and the United Arab Emirates), which are also characterized by the same phenomenon of female advantage in education but for very different reasons.

The problems of interpretation, as we have already noted, become even more complex when we move beyond the very basic achievements, such as education or longevity, and onto the thorny area of autonomy and empowerment — astutely explored by Kabeer (1998). Issues of empowerment and autonomy have entered poverty debates through a number of different channels. As was noted above, both the capability framework and other post-opulence understandings of poverty have attempted to broaden the notion of well-being beyond its basic physiological aspects, in order to include issues such as power, self respect and dignity to which intrinsic value is attached. At the same time certain strands of policy discourse on poverty have subverted the notion of female empowerment, seeing it as an effective means of reducing poverty or meeting other policy goals. Its value here tends to be more instrumental and the aim has been to establish the nature of the association between the “degrees of autonomy” permitted to women in different contexts and certain demographic, economic or social outcomes (e.g. fertility reduction, child welfare, etc.), hence the search for easily quantifiable indicators that can be regressed or correlated against these other variables.

Kabeer’s (1998) understanding begins from the former position. She sees empowerment as being inescapably bound up with disempowerment and as being about the *process* by which those who have been denied the ability to make choices acquire such an ability. However, in order to make the notion of choice relevant to the analysis of power, she qualifies it in a number of ways — highlighting in particular the importance of including the *context*, *content* and *consequences* of choice within the analytical framework. She argues that it is only through grounded analyses that issues of power and disempowerment can be meaningfully assessed, because it is only at that level that these contextual dimensions of choice can be understood and interpreted. This is clearly an area where the search for indicators is likely to be futile. Statistical perspectives on intra-household decision making, she suggests, should be seen as what they are: “simple windows on complex realities” (p. 28). They may provide “a brief glimpse of the processes of decision making” (p. 28), but they say very little about the subtle negotiations that go on between men and women in their private lives — which are difficult to capture even through grounded analyses.

To return to our introductory remarks, if by the gender analysis of poverty we mean the intra-household distribution of resources, and whether women suffer disproportionately from poverty and are thus “over-represented” among the poor, then social and economic indicators have been able to provide some, albeit partial and incomplete, glimpses. But if the gender analysis of poverty is to unravel how the processes leading to impoverishment, and the escape routes out of destitution, work themselves out, and maybe differently for women and men, then social and economic indicators clearly need to be used *in conjunction with* other kinds of analyses.



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## FROM OUTCOME TO PROCESS: INSTITUTIONS AND “ENTITLEMENTS”

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The argument so far has been that an exclusive focus on poverty outcomes very often means that the processes leading to poverty are either overlooked or otherwise analysed through regressions and correlations of a few variables abstracted from a far more complex scenario wherein a wide range of institutions interact. It also, inevitably, means that gender will be dealt with through a process of disaggregation — either of households (using the gender of the head as the stratifier) or of individuals (differentiating males and females). The question that has not been explicitly addressed, but which is clearly central to our discussion, is: How can the focus of poverty analyses be sharpened and shifted so that the social, economic, cultural and political processes and institutions that are implicated in the creation and perpetuation of poverty become more lucid and central to the enquiry?

An important contribution to poverty *analyses* has come from the literature on hunger and famines, namely the “entitlements” framework as developed initially by Amartya Sen, and later in collaboration with Jean Drèze (Sen, 1981; Drèze and Sen, 1989). Entitlement analysis has been useful in directing attention to the processes through which individuals gain access to commodities and other resources (or fail to do so), which is said to depend on their socio-economic position and on the rules that render claims over commodities “legitimate”. And in as much as these rules and norms “entitle” people differently and unequally, they draw attention to the likelihood that deprivation will be diversely constituted across a population along the lines of gender, caste, class, etc. (Kabeer, 1997).

Taking on board the important qualifications and criticisms made of this framework, especially of its excessively marketized and “legalistic” view of the rules of entitlement (Gore, 1993; de Waal, 1990), entitlements can now be seen more broadly to encompass not only state-enforced legal rules, but also socially-enforced moral rules which constrain *and* enable command over commodities. Thus rather than seeing famine as inevitable once certain entitlement shifts occur (such as falling wages in relation to food prices), it is now possible to include rebellions and food riots as forms of collective action that enable the poor to cope with calamity.

In E.P. Thompson’s original work, food riots are identified as a form of collective action by which the poor in eighteenth century England, when threatened by exchange entitlement failure in the market-place, ensured that the moral economy of food provisioning, derived from Tudor times, took precedence over legal property rights as rules of entitlement. In that case, entitlement to food depended on acts which were *legitimate*, but *illegal*. These illegal acts also had specific rules. The riots were characterized by restraint and discipline, and a key element of them was not theft, but the setting of a just price (Gore, 1993:447)

The understanding that rules and norms are “unruly” and negotiable carries significant implications for both poverty and gender analyses, by providing some analytical space for considering individual and collective expressions of agency and contestation. As we will see below, in some contexts the structural constraints

on women may be overwhelming and it may be difficult, or even dangerous, for such expressions of agency to take shape. But elsewhere gender-based norms and rules are both more contested and more malleable, and women are able to express resistance and make resource claims in meaningful ways. The rest of this section will consider gender-based access to resources, focusing in particular on land and labour, which are critical in the “asset portfolio” of the rural and urban poor in many Asian and African countries. But it will be argued that there are important differences in how men and women, in the same contexts, relate to these assets and employ them in their survival strategies.

## ◆ Gender-Based Entitlements: The Intra-Household Arena

Kynch’s (1998) analysis of gender and malnutrition in the north-west Indian village of Palanpur raises questions about how food entitlements (or command over food) are determined, and how men’s and women’s ascribed roles as producers, provisioners and reproducers affect their claims on each other, and in turn explain particular patterns of nutritional outcomes. Her contribution draws on the existing scholarship on gender-based entitlements (Sen, 1984; 1987; Agarwal, 1992), qualifying it in two significant ways.

First, as was noted earlier, the “gender reversal” in the nutritional status of adults versus their children that is thrown up by her evidence highlights the importance of having a dynamic perspective over the life cycles of men and women, and the well-being risks that men occasionally face. Second, in order to explain these contradictory outcomes, a tripartite division of food-related activities is introduced (producing, provisioning, reproducing) as opposed to the usual bipartite one (producing, reproducing). This helps clarify the complex motivations underpinning both men’s and women’s interests in provisioning and reproducing — altruistic concern for others, a concern for social status, as well as economic calculation and pursuit of self interest. It thereby avoids the simple dichotomy between female altruism versus male pursuit of self-interest which has been characteristic of some economistic models of the household. It also provides a better understanding of the nature of intra-household claims by drawing attention to, first, the interdependence and complementarities between the three spheres of activity (going beyond the simple “trade-offs”), and second, the ways in which moral claims and obligations can be structured by exclusive gendering of each sphere, and the detrimental impacts of this constraint on household food entitlement.

In terms of provisioning, women in this Indian community are ideologically, economically and socially excluded from the public sphere, and therefore from both some of the energy expenditure that a provisioner bears, and the reciprocity that provisioning offers. The argument of the paper is that while adult women may have been able to maintain an energy balance more easily than adult men who are burdened with energy-demanding agricultural tasks, the most devastating part of the rules of entitlement in this community is the effect on little girls who suffer severe setbacks in their growth process. Future provisioners (boys) are protected more than future reproducers (girls), even though current provisioners (men) may suffer more thinness than the current reproducers (women), probably because of the effort involved in meeting provisioning obligations. This helps to guarantee the continuity of the household, the patriline and its assets.

This argument has resonances with Sudha and Rajan's (1998) reading of the demographic trends in India. They argue that in the context of a patrilineal kinship system where marriages are arranged on principles of dowry and exogamy<sup>15</sup> such as the one characterizing the northern plains of India, family strategies for amassing wealth, and transferring wealth intergenerationally, work through mobilizing kinship networks and manipulating the marriage of their sons and daughters in ways that pose survival threats for their female offspring. Although they provide evidence of women's collective activism and resistance against these practices, the conclusion that can be drawn from their analysis of sex ratios, and also from Kynch's (1998) village-level evidence on daughter disfavour, is that despite such forms of collective action the constraints on women at the household level remain very severe and their status is tied up with conforming to the social norms that deny them (and their daughters) agency.

Gender-based entitlements in this context may fall in the realm of what Bourdieu refers to as "*doxa*" — that which is accepted as natural and self evident beyond discourse or argumentation — rather than being actively contested and negotiated (Agarwal, 1992). As Kabeer (1998) explains, in these circumstances it is not just difficult, but also dangerous, for individual women, isolated within their families, often cut off from the communities in which they grew up, to challenge the social norms that define them as lesser beings. Collective action in the public arena makes the project of social transformation an act of solidarity rather than individual self interest and is therefore likely to be effective in the long run — but the interlinkages between collective action and transformations at the individual level are complex, diffuse and unpredictable.

For Kynch (1998) too, gaining recognition as either a provisioner or reproducer can be part of individual strategy in building up bargaining strength within the household (what Kabeer refers to as "status"), and part of the argument of her paper is that over-specialization in reproducing can be a very risky strategy. Jackson and Palmer-Jones (1998) probe further the question of why gender divisions of labour take the particular forms they do, focusing on the effort-intensity of work as an important, but generally neglected, dimension. They argue that the energy-intensity of work has significant implications for gendered well-being, is central to women's and men's subjectivities, and therefore relevant to the moral claims they make on each other through processes of intra-household negotiation and bargaining.

Drawing on a number of different disciplines and sub-disciplines that address the issue of work intensity, they show that heavy work is likely to be objectively more burdensome to many women than men, in the sense that relatively small size and a female constitution can mean that the burden of effort intensive work is greater for women (i.e., it feels more burdensome), and an aversion to some forms of such labour may be expected. It may very well be that a woman, faced with such onerous and well-being threatening work, employs economic strategies (hire labour for the task), relational strategies (persuade a daughter-in-law, husband or child to do it) or technological strategies to reduce drudgery. Relationships are resources which can be deployed in this way, and ideologies of work such as

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<sup>15</sup> Dowry is a transfer, in the form of money, gold and consumer goods, from the bride's parents to those of the groom. Exogamy is the practice whereby women are expected to marry into a family that lives in a different village from their natal one.

discourses about strength and masculinity, or about endurance and femininity, may have real value to women in processes of negotiation and bargaining. The interesting observation made by Kynch (1998), that women in Palanpur were concerned that a metalled road could result in their being “*pressured* into petty trading” (p. 15, our emphasis) may indeed be indicative of what Jackson and Palmer-Jones (1998) refer to as women’s aversion to work, and their strategies for building up “body capital”. But even though women in this community may have been successful in reducing drudgery and thereby maintaining energy balance more easily than men, this seems to have been achieved at the cost of childhood under-nutrition, which may have harmed women in other ways.

For Kynch (1998), as well as for Jackson and Palmer-Jones (1998), the household is a central terrain where the gendered rules of entitlement (to work, rest and food) are negotiated and enforced, even though the implications of their analysis extend to other institutional arenas (labour markets in particular). One of the important contributions of Gore’s (1993) critique of entitlement analysis was to highlight the fact that these moral rules are by no means limited to domestic institutions (family, household), as Sen’s original formulation of “extended entitlements” would have it. “Sen’s entitlement analysis”, he argues, “marginalises non-governmental sites of rule-making and rule-enforcing which affect entitlement by either downplaying the role of socially enforced moral rules, or compartmentalising them to the domestic sphere. As a consequence, the interplay between the working of socially enforced moral rules and the working of state-enforced legal rules in determining a person’s entitlement is ignored” (Gore, 1993:444). This is an important and useful observation not only for poverty analyses, but also for the gender analysis of poverty alleviation policies. It is arguable that some of the more interesting questions that a gender analysis of poverty would raise hinge precisely on this interplay between state-enforced legal rules and socially enforced moral rules, which extend beyond the domestic arena.

## ◆ Gender-Based Entitlements: The Interplay between Institutions

In a more general sense it has been possible to use the entitlement framework to draw attention to the importance of social institutions in economic life. The entitlement framework fits neatly into what has been termed the “institution-centred” view of poverty, as opposed to the “goods-centred” and “people-centred” approaches (Gore and Figueiredo, 1997). The “institution-centred” approach highlights the importance of institutional arrangements, or the rules that provide the enabling framework within which individuals and groups make choices and go about their daily business of making a living. Social institutions can be understood very broadly to be “the rules of the game . . . the humanly devised constraints that shape human interaction” (North, 1990:3), or more usefully, “the operation of tradition, custom, or legal constraint” which tends to create “durable and routinized patterns of behaviour” (Hodgson, 1988:10).

In view of the significant ways in which intra-household relations impact on women’s access to resources and well-being, the domestic arena has understandably been the focus of a significant body of feminist scholarship over the past two decades. Since the mid-1980s, however, a rapidly expanding literature has come to explore the ways in which familial and gender norms are drawn upon to construct the terms on which women and men enter, and participate, in public life and in the marketplace (Kabeer, 1994:61). Property institutions, judicial systems, public provision of goods and services, and local and regional labour markets have all been usefully included under this rubric, making it no longer acceptable to see the household as the only institution where gender is present as a salient organizing principle. A similar concern is articulated by Gita Sen (1998): the need to move beyond the assumption that gender power relations at the local level are embedded in conjugal, intra-household relations alone. The structures of power that women confront at the local level, she adds, operate not only within the home, but also in the terrain of communities, local markets and institutions of local government. Walker’s (1998) analysis of the South African land reform programme provides a poignant illustration of the gendered nature of these different institutions, as well as the interplay between legal and moral rules that takes place within *and* across them. It also highlights the difficulties involved in reaching poor women through standard poverty alleviation strategies, when these strategies are implicitly designed to meet the needs of poor male subjects.

### *Women and land*

The South African Constitution and the intricate policy framework for land reform that has been put in place are testimony to the explicit commitment made by the government to gender equality as a long-term goal and to targeting women as a major category of beneficiaries in the short to medium term. However, what Walker’s (1998) analysis also reveals are the serious gaps between policy directives and on-the-ground results, and why even a “well-meaning” government is finding it so difficult to implement gender-sensitive, redistributive policies.

Of particular significance to our present discussion are her observations about the role of the judiciary (the Land Claims Court), the institution of chieftaincy (and, in particular, the power of the chiefs to allocate land), and community-level

dynamics, which present varying constraints on the process of implementation. The serious tensions between government's commitment to gender equality (reflected in both the Constitution and in the land reform provisions), on the one hand, and its reluctance to alienate neo-traditionalist structures of rural local government (i.e. the institution of chieftaincy), on the other, highlight the complex interplay between state-enforced legal rules and socially enforced — though contested — moral rules, and the contradictions and ambiguities that mark women's positions vis-à-vis these local-level institutions. Walker also warns that what these local power structures mean is that the pursuit of tenure security could *in practice* end up entrenching existing inequalities in access to land by formalizing what are today informal rights and registering such rights in the name of the household heads only, "thereby fixing women's marginality in a legal trap. . . . This is not policy, but the pressures propelling harried officials in this direction are strong" (Walker, 1998:12).

This is a useful observation and hints at two inter-related sets of issues. First is the argument that in social contexts marked by huge differences in educational levels and by differential access to state administration, there is much reason to fear that the adjudication/registration process will be manipulated by the élite in its favour, and thereby result in new sources of tenure insecurity for less influential rightholders; both colonial and modern attempts to reform customary tenurial practices in sub-Saharan Africa, it is argued, have fallen into such traps (Platteau, 1995). Emerging evidence from South Africa suggests that those black South Africans most likely to emerge with access to land are strategically placed men with resources derived from non-agricultural sources, as well as political connections (Murray, 1996).

What this also suggests is that where women have some customary usufruct rights, as is the case in many sub-Saharan African countries, there may be fewer arguments for formalizing those rights even if tenure security is defined in very broad terms (as it is in the South African case) and even if women are explicitly targeted as beneficiaries. Second, it is also questionable whether inadequate access to land plays an important part in the creation and perpetuation of women's impoverishment in sub-Saharan Africa. For some women in sub-Saharan Africa, Lockwood and Whitehead (1998) point out, discriminatory inheritance laws and poor land access are significant constraints, but only in a minority of cases is inadequate access to land because of an inability to secure usufruct rights by itself a cause of poverty. "That land rights rarely emerged as a voiced concern of rural women in the PPAs we take as some support for this view" (Lockwood and Whitehead, 1998:27). Walker, however, notes that the cry for land in South Africa is strong, but that land is valued by rural women as a resource in gender-specific ways and that farming does not define their interest in land. Drawing on her micro-level research in one African community in KwaZulu Natal (Cornfields), Walker notes:

Overall, Cornfields women presented themselves as more interested in preserving an agricultural subsistence base than the men. They recognized land as a major household resource in supplying wood, water and thatching grass and were more interested than the men in land for residential purposes. . . . Secure access to land was also tied up with complex notions of 'a rural way of life', which encompassed more than specific kinds of livelihoods and material patterns of living, embracing in addition certain values and ideals about social relationships and manners

of human interaction, such as respect for authority and for order, which are perceived to be dangerously absent in urban areas (1998:5-6).

The connections between customary rights, *de jure* (legal) rights and *de facto* control are quite complex and varied across different contexts of time and place. Kabeer's (1998) discussion of land rights in Muslim and Hindu communities of India (and Muslim countries like Bangladesh and Iran) raises a number of additional points about the significance of these different rights, bearing in mind the important qualification that gender divisions of labour in this part of the world bear little resemblance to those in sub-Saharan Africa where women's provisioning roles as well as their engagement in production for the market are socially recognized. The relevance of land rights in the South Asian context revolves more significantly around how they can be used by women to make moral claims on others, rather than be used directly for independent cultivation. In the Indian literature the critical measure of women's access to land has tended to be *de facto* rather than *de jure* entitlement; on this basis the difference between Hindu and Muslim communities is considered to be inconsequential since in both contexts women are effectively propertyless. However, as Kabeer goes on to argue, there are problems in assuming that *de facto* ownership can reveal all that there is to know about women's entitlements. Evidence from a number of different Muslim communities (in Bangladesh, Iran and West Bengal) shows that even though Muslim women do waive their land rights to their brothers, they see it as constituting a possible future claim (should their marriages break down), and in some contexts they do in fact press for their property rights. These are potentials which are not easily available to women in communities where such rights have not been recognized by customary law and tradition, even if they have subsequently been brought into existence by legislative action. Kabeer thereby draws attention to the importance of customary construction of rights rather than recently introduced legal ones. She also poses an important question about how changes at the legal level translate into the expansion of women's choices and agency.

The limited conclusion that may be drawn from this brief discussion of women's land rights in South Asia and sub-Saharan Africa is that cultural constructions of women's rights, or customary rights, affect women's attempts to secure a livelihood for themselves and their dependants in ways that are quite distinct across different contexts, and also different from men in the same context. One generalization that can be made is that whatever the nature of the economic system in terms of its productive and exchange relations, women's ability to function as fully acting subjects in relation to property is always less than that of men, and mediated through her relationships with men (Whitehead, 1984). While it is desirable to make women's rights to resources more formal and less conditional on relations with men (or local patriarchal institutions), it also needs to be recognized that ambiguity may have strategic advantages for women: it may arouse less resistance and yet deliver subtle forms of influence and control (Jackson, 1997b). State-enforced legal reforms with an explicit commitment to gender equality can, under some circumstances, strengthen women's position. But whether this potential is realized in practice largely depends on the local and community-level dynamics and institutions through which policy intentions work themselves out, and in particular, on the extent to which poorer women can be effectively organized to engage with and make use of the formal structures and legal opportunities that are being put in place. Moreover, in contexts where customary

entitlements — themselves highly variable and changing — recognize women's ownership and/or usufruct rights, it seems important to ask questions about whether these rights need to be formalized, especially in view of the fact that in many sub-Saharan African countries an inability to secure usufruct rights is by itself probably not a significant cause of women's poverty.

### *Women and labour*

A related point emerging from Walker's (1998) contribution with particular resonance for gender-sensitive policy making concerns the nature of constraints on subsistence agriculture, especially as it affects women farmers in South Africa. Drawing on the findings of detailed micro-level research, she argues that lack of land is not the only constraint on agricultural production, confirming some of the observations that have already been made. In addition to the "technical considerations" limiting household subsistence and commercial production (credit, extension), lack of time for labour-intensive working of the land, in particular for weeding, is a critical bottleneck. This reiterates Whitehead's (1984) earlier observation that in many parts of sub-Saharan Africa the usefulness of land rights is limited by the extent of *rights in labour*, and that for rural women the difficulty of commanding the labour of social superiors means that they can never mount the large exchange work parties which are so important for male farmers.

Labour issues, especially casual labour markets which embrace labour relations between and within households, have been an important theme in the rural political economy of Africa in recent years, and in gender analyses of African agriculture in particular. Their continuing significance is underlined both in Kasente's (1998) analysis of Ugandan agricultural strategies, as well as in Lockwood and Whitehead's (1998) reading of the Poverty Assessments. In the two Ugandan communities studied by Kasente, women's labour constraints are shown to be particularly acute in view of their limited capacity to hire labour (due to cash shortages), which is also leading to a significant reliance on child labour; child labour, it is argued, acts as a substitute for hired labour in women's farming enterprises.<sup>16</sup>

The issue of women's labour constraints in rural sub-Saharan Africa that these contributors highlight is particularly pertinent in view of the current policy consensus on poverty, which vehemently maintains that labour-intensive growth is pro-poor because labour is "the poor's most abundant asset" (World Bank, 1990). This particular policy dogma has even led some analysts to criticize, at a very generalized level, labour-saving high-yield varieties and planting and weed management technologies because, for them, "saving" labour is tantamount to "unemploying" labour (Lipton and Maxwell, 1992).<sup>17</sup> As critics have rightly argued, dismissing labour-saving technologies in a static manner such as this is untenable, for not infrequently labour-saving varieties have been popular with farming women for reducing drudgery, and with women wage workers for

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<sup>16</sup> The fact that exchange labour is not mentioned in Kasente's paper may be a reflection of the demise of this institution and the growing importance of hired labour arrangements in the Ugandan countryside.

<sup>17</sup> Even though in an earlier section of the paper it is admitted that "increased labour intensity may not be the best solution for poor women" (Lipton and Maxwell, 1992:15), the authors offer no clue as to how these two positions can be reconciled



stimulating growth in labour markets (Jackson, 1996). If women (and men) smallholders strive to reduce the effort-intensity of their work, then it seems unreasonable to deny them the option of doing so through the adoption of technologies such as labour-saving varieties.<sup>18</sup>

To argue that the policy prescriptions for poverty reduction through “labour-intensive growth” are problematic, for the reasons noted above, does not mean that the opposite, equally generalized and stereotypical, view of women as “over-worked victims” suffering from “time famine”, should be endorsed.<sup>19</sup> In many contexts, such as in Iran and Bangladesh, female underemployment is a serious social issue — not just among the affluent classes but also among some of the poorer urban and rural social strata where poverty is very often associated with “enforced unemployment, particularly among women” (Kabeer, 1998; Razavi, 1997). At a deeper level, what is really at issue is not so much whether women need more work or not, but rather the kinds of work that can raise them and their dependants out of situations of poverty, which in turn draws attention to the *content* and *quality* of work. This is how we can make sense of the apparent paradox in Walker’s (1998) paper, where she suggests that rural women are overworked, and yet at the same time they voice a clear and explicit demand for more urban jobs which presumably involve less drudgery and offer higher returns to effort.

The linkages between poverty and the labour process, which have been the source of long-standing tensions between neo-classical and critical institutionalist approaches, are explored at some length by Razavi (1998), who argues that, as far as labour market issues are concerned, the New Poverty Agenda offers very little that is “new”. Both trade liberalization and labour market deregulation, which are the hallmarks of this agenda, have featured prominently as policy conditionalities under structural adjustment and stabilization programmes, and their gender implications remain deeply contested. The fact that this agenda remains wedded to an abstract theory of labour markets that overlooks the insidious ways in which power hierarchies pervade both “formal” and “informal” labour markets inevitably means that it cannot problematize the ways labour market arrangements themselves can perpetuate poverty and discrimination. On the other hand, while power hierarchies (between labour and capital) are central to institutional approaches, the failure to analyse adequately the *interplay* between class (labour/capital) and gender (male/female) hierarchies *across* different institutional arenas (labour market, conjugal/familial sphere) means that the distinctiveness of women’s experience of work is sometimes missed.

The second, and related, point to note is that while labour constraints are clearly an important issue for some women, there are serious limitations in the way these labour constraints *have been* conceptualized for policy purposes: first, by ignoring the contextual and institutional parameters of work; second, by de-linking work

<sup>18</sup> In practice, however, one of the main impediments to the adoption of these technologies has been that they require complementary inputs such as timely irrigation and fertilizers that are, in many countries, beyond the reach of most smallholders.

<sup>19</sup> Some of the contextualized literature on the impacts of structural adjustment policies on women highlights the increasing demands on women’s time, as a way of coping with cut-backs in male wages and state provision of services (see Gonzalez de la Rocha, 1998 and references in her paper). But it would be problematic to use these observations as the basis for a generalized and universal description of women’s work.

and well-being; and third, by failing to make adequate linkages between the micro-level gender divisions of labour and the macro-level economic and social processes.

One well-known strand of thinking, which has become near-orthodoxy among development practitioners, comprises the “triple roles” or “multiple roles” frameworks (Moser, 1989; Commonwealth Secretariat, 1989). Arguably these frameworks have been very useful in drawing attention to the multiple demands on women’s time, particularly pertinent in the context of drastic cut-backs in social spending and falling real wages — as during the 1980s economic crisis in many parts of Latin America (Gonzalez de la Rocha, 1998). Nevertheless, the analytical emphasis on what women do (“roles”) leaves many important issues unaddressed. It says very little, for example, about the kinds of social relationships and institutional contexts within which women carry out their work, which are arguably far more important than the quantity of time allocated to different activities (Kabeer, 1992). Kasente’s (1998) observation that women smallholders rely on child labour, while their husbands are more successful in commanding hired labour, is indicative of the kinds of constraints that women farmers face because of their social position in the household and domestic group, even though in terms of labour inputs men and women in this particular setting seem to be making more or less equivalent contributions. Analysing female poverty within a static framework of multiple roles can also have the added disadvantage of being divorced from the complex processes of economic and social transformation that are underway in a particular context; it becomes difficult, therefore, to decipher the implications for gender inequalities of, for example, increasing rural differentiation driven by agricultural growth (Evans, 1994).

Another way of conceptualizing women’s time constraints is the “gender and adjustment” model, which makes explicit linkages with the current macro-policy framework in sub-Saharan Africa (Collier, 1989; Palmer, 1991). Using elements of neo-classical economics, it combines the disaggregation of agents by gender with a sectoral disaggregation of activities to show that gender can act as a serious constraint on the mobility of resources (especially labour) between different sectors, thereby frustrating the aims of structural adjustment. It makes the policy exhortation that women’s “reproductive burden” be reduced (through public investments in electricity and piped water, etc.) *in order to* enable them to respond more easily to price incentives, switching their labour from the production of non-tradables and protected tradables, to tradables (the sector that is set to expand under adjustment). Although it would be difficult to dispute the need for social investments to reduce women’s reproductive “burden”, these particular arguments present some serious analytical and policy blindspots which need to be approached with caution (Elson, 1995; Lockwood, 1992). Two problems in particular are relevant to our discussion.

First, according to this model there are no justifications for reducing women’s work burdens, through labour-saving domestic or agricultural technologies, if they use their free time for other purposes, such as rest or even leisure. This style of thinking is not new. The need for domestic water provision, for example, has very often been justified in terms which suggest that women who spend less time on water collection will spend more time on farming. There is a somewhat similar logic behind self-targeting through the labour test, which effectively screens out the less poor and offers effort-intensive work to those ill-equipped to bear the

bodily costs of energy-intensive work (the women, and the poor). However, as Jackson and Palmer-Jones (1998) forcefully argue, this kind of policy obsession with extracting work from the poor, which is being validated through the New Poverty Agenda, needs to be viewed with concern since it may not provide much of an escape from poverty; in some contexts and for some groups it may in fact generate “energy traps”, undermining their bodily well-being. If women in particular seek to sustain bodily well-being through avoiding heavy work, then poverty-alleviation policies need to consider carefully how they might impact on women’s ability to do so. At a more general level, this highlights the tension we have already noted between capability-enhancing employment versus effort-intensive work, or drudgery, that generates poverty through the labour process — a tension that was succinctly captured in the concept of “the working poor”.

The other problem with the model is that it fails to problematize the wider policy framework, which is assumed to be inherently benign. It would be quite short-sighted, for example, if this kind of analysis were taken as a suggestion that women’s labour bottlenecks should be removed so that women could switch their resources to the production of tradables, without asking further questions about what kinds of market opportunities would be opened up to them, or how this intensified market integration would impact on household food security. In Collier’s model, for example, there is no mention of the food security risks (at the household and national levels) that may be involved in relying on export crop production, nor is there any recognition of the long-term price risks involved if agricultural export strategies are pursued in many countries simultaneously — the fatal “fallacy of composition” that characterized agricultural policy prescriptions under traditional SAPs and continues to do so under the New Poverty Agenda.

Kasente (1998) raises some important questions about the tensions between the current policy emphasis in Uganda on “non-traditional export crops” (NTEC) while food security considerations are a priority in women’s (and to a lesser extent men’s) farming strategies. Fifteen years of political turmoil and institutionalized forms of predation and expropriation have underlined food security concerns and the importance of self provisioning in the Ugandan countryside. This is not to suggest that cash crops and food crops are mutually exclusive categories; in Uganda, beans and maize can be used for both purposes. Rather the question is about how the commercialization of farming will change the ways in which food is secured (from self provisioning to greater reliance on markets, etc.), the possible risks and vulnerabilities that these changes may entail, and the degree to which women’s work burdens, well-being and autonomous spheres of activity will be affected.

The issue of food *security* — and *vulnerability* — is central here not only because of domestic “market imperfections” exacerbated by minimalist agricultural policies (monopolistic buyers replacing marketing boards, increasing food prices, rising costs of inputs, transport bottlenecks, etc.), but also in view of the fact that both international commodity prices *and* international food prices are highly volatile (South Centre, 1997). The collapse of international coffee prices in the late 1980s — which put many African economies, including Uganda’s, under severe stress — is a recent and vivid reminder of the fact that global markets, in addition to providing the much-emphasized opportunities and outlets, are also capable of generating considerable risks and devastating shocks. It is not at all self-evident that the so-called “non-traditional” export crops (e.g. maize, beans, vanilla) would

not be subject to the same risks that characterize the more “traditional” export crops (e.g. coffee, cotton).<sup>20</sup> The interesting point emerging from Kasente’s (1998) contribution is that women (and to a lesser extent men) farmers are not, in fact, swiftly switching their resources into the production of NTECs such as vanilla, even though they offer an attractive price. And according to Kasente’s reading of the situation (based on qualitative evidence), the reasons for this “perverse” supply response on the part of smallholders include concern for household food security (which is particularly evident in the responses of women farmers), as well as women’s greater control over the marketing and the revenues from the sale of food crops (compared to pure cash crops like coffee and vanilla). The reasons why female labour is “stuck” in the production of non-tradables in these villages then may be quite different from those identified in Collier’s model.

The other question that needs to be raised, which takes us beyond the issue of labour constraints in agriculture *per se*, concerns the strategic importance of farming as a poverty-alleviating mechanism. Here again the papers commissioned by UNRISD provide some interesting clues that need to be probed further. The repressive migrant labour system and the gradual erosion of black peasant production through a combination of factors flowing from state policy, which have been the hallmarks of South Africa’s transition from an agrarian to an industrial economy in the twentieth century, have made lasting imprints on rural livelihood strategies. Rural-urban migration has become a way of life and agricultural production, whether for subsistence or for the market, has become a marginal activity. “Agricultural production is, for good reason, seen as a high risk activity . . . and most rural women (like most rural men) look to urban jobs as the route to household economic survival and advancement” (Walker, 1998:3). There are serious doubts about whether agriculture can generate the route out of poverty and destitution in the absence of substantial and sustained developmental support from the government, which in the current policy climate seems “difficult” to achieve.

While South Africa is in many ways unique, Walker’s (1998) observations about the limitations of agriculture are nevertheless relevant to many other contexts as well. Lockwood and Whitehead’s (1998) reading of the survey evidence produced in the Poverty Assessments on Tanzania, Zambia, Uganda and Ghana is that off-farm activities, such as trading, transporting and state employment, have important poverty-alleviating repercussions.<sup>21</sup> But these are not explored in the policy discussions of the PAs, which simply emphasize raising agricultural productivity through better technology, research and extension (“modernization” of agriculture), and the need for diversification into non-traditional export crops. The preoccupation with agriculture as the sector that can produce labour-intensive growth in sub-Saharan Africa, they suggest, produces a lack of analysis and policy interest in how off-farm activities might become a more important source of income for the poor, or what policies might help an increase in such activities.

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<sup>20</sup> As Gabriele Köhler (UNCTAD) pointed out, the label “non-traditional” is quite loaded, given that these are fairly traditional international commodities, as well as having been traded across borders in this part of Africa for some time now (personal communication).

<sup>21</sup> Jayati Ghosh makes a similar point on the basis of Indian survey data for the period 1977-1994. She also makes the important observation that the growth of the off-farm sector was not in any way a spill-over from the agricultural sector (see Ghosh, 1998).

This is not meant to endorse the global policy prescriptions for the agricultural sector, which condemn in advance any attempt by the public sector to intervene in agricultural markets through protective tariffs, quotas and subsidies, as well as transfers of wealth (Barraclough, 1998; South Centre, 1997). The rising input costs and credit shortages noted with concern by some of these authors are testimony to the harmful effects of these policies. Nor is it meant to suggest that the off-farm sector, or the urban labour market, can be the panacea for poor women. Walker (1998), for example, explicitly notes that the industrial sector is highly stratified, not only by race but also by gender, making it difficult for rural women to access urban and industrial jobs — a theme that is also explored at some depth by Gonzalez de la Rocha (1998) and Razavi (1998). Rather Walker's analysis shows the importance for the rural poor of "straddling" different economic options when the returns to farming are so pitiful. This in turn raises two further questions: first, what (if any) are the relations between these different spheres; and second, what is the significance of the gendering of each sphere for issues of subordination and gender equality?

Walker (1998) and Kynch (1998) highlight the interdependence and complementarities between "producing", "provisioning" and "reproducing" in rural South Africa and in rural Uttar Pradesh, respectively. In the urban context, not surprisingly, monetary returns from market-based production take on an even more strategic significance as is clearly reflected in Gonzalez de la Rocha's (1998) analysis based on evidence from urban Mexico. She argues that without incomes coming from wages and salaries, the urban poor's ability to turn to self-provisioning is eroded, leading to a vicious process of cumulative disadvantage. Even support from social networks, she adds, requires investments of time, effort and *money*, since networks are social constructions that need to be established and maintained; they are not simply "out there" for people to access. When people are so poor that these resources are not available, they no longer form part of a social network and social isolation accompanies labour exclusion. The point emerging very strongly from her contribution is that self-provisioning is not an "autonomous" sphere and it would be irresponsible on the part of decision makers to assume that it can become a viable safety net for the urban poor. Although less obvious, it would be equally misleading to think that self-provisioning is an "autonomous" sphere in those parts of rural sub-Saharan Africa where smallholders predominate. Indicative of their lack of "autonomy" is Lockwood and Whitehead's (1998) observation that food security considerations very often push poor farmers into casual labouring on a daily basis, which effectively diverts their labour from their own production and becomes an important part of the dynamic of impoverishment.

While there is consensus among the authors of the UNRISD commissioned papers on the complementarities between different spheres, there is less agreement as to how the gendering of different spheres impacts on gender relations (i.e. male/female power dynamics and issues of subordination).<sup>22</sup> We may agree with Kynch (1998) and Kabeer (1998) that specialization in reproductive work can be

<sup>22</sup> The papers do not, however, explore the nature of the linkages (if any) between agricultural and off-farm activities. See Harriss, 1987 for an analysis of this question in Tamil Nadu (India) and Hart, 1996 for South Africa; both provide a devastating critique of the so-called regional growth linkages whereby the small farm sector is supposed to create the conditions for its own existence by stimulating non-farm jobs within rural regions. A similar conclusion emerges from Ghosh's (1998) analysis of Indian macro-data.

very risky for women and young girls because of the low value/status that it carries, based on the evidence that they and Sudha and Rajan (1998) produce on daughter disfavour in north-west India. But the social significance and implications of women taking on a more independent “bread-winning” role are clearly context specific, as well as being open to different interpretations even within the same context.

For example, while in South Africa women have not been able to tap into the urban wage labour market and remain predominantly confined to self-provisioning and reproduction, this does not mean that patriarchal relations in rural areas remain “frozen in a rigid mould of ‘tradition’” (Walker, 1998:6). On the contrary, Walker argues, gender relations in the rural areas are in considerable flux, with an overall decline in patriarchal authority (also evident in the relationship between patriarchs and the youth) and a concomitant opening-up of social space for contestation between men and women about the terms of male authority and the meaning of “tradition”.

Gonzalez de la Rocha’s (1998) interpretation of women’s entry into wage employment in urban Mexico raises questions about whether women’s rapid entry into the wage labour market under conditions of duress, characterized by rising male unemployment, falling real wages and cut-backs in social spending, has been empowering in a feminist sense. A similar point is reiterated by Razavi (1998), who argues that the closing of the gender gap in wages ideally needs to be accomplished in the context of rising, or at least non-falling, wages for men. What these interpretations highlight is the extent to which conflicts of interest between men and women are unlike other conflicts, such as class conflicts, because of the important dimension of “togetherness” that marks gender relations. In a context where the livelihoods of significant numbers of women include a legitimate reliance on male wages, which compensates them for reproductive labour, male unemployment and drastic cut-backs in male wages have enormous significance for women’s standard of living.

But the micro-level studies to which Razavi (1998) refers also highlight the possibilities and the “spaces” that entry into the urban labour market has opened up for some groups of women in some contexts, allowing them to re-negotiate the terms of their domestic relationships, and in some cases to walk out of, or not enter into, unsatisfactory relationships. This is not to deny the fact that the increased field of manoeuvring at home may be matched by different patriarchal controls in the factory setting — which, as one study of women’s industrial work in Java argued, keeps the Javanese factory daughters “relatively acquiescent, poorly paid and vastly unprotected in industrial jobs that are often dangerous” (Wolf, 1992 cited in Razavi, 1998). This highlights, once again, the need to move beyond the assumption that gender power relations at the local level are embedded in conjugal, intra-household relations alone, and the importance of having an “interactive” view of the dynamics among factory women, factory employment and workers’ family and household relations.

The debates on women’s entry into wage employment have raised many difficult methodological questions, such as the tension between “objective” criteria (skills, wages, health issues and bodily well-being more generally) and “subjective” criteria (women’s perceptions of their work), for assessing the implications of this form of work for both poverty eradication and wider issues of discrimination and

subordination (i.e., contestation and negotiation within the home and in the world of work). While reference to some objective criteria of well-being is clearly needed in order to get us away from the utilitarian insistence in taking subjective preferences as the only criteria for making judgements about values and welfare, most of the authors of the UNRISD commissioned papers would also agree that there is a need for women's own perceptions and values to find some space in these discussions if only because they allow us to better understand the "choices" that women make. As the authors of in-depth case studies have pointed out, one of the main weaknesses of structuralist analyses of women's entry into industrial production has been that they have frequently rendered women "faceless and voiceless" (Wolf, 1992:9) by attributing much more personality and animation to capital than to the women it exploits (Ong, 1988:84).

Women's entry into these export-oriented industrial sectors also means that the current tensions between Northern and Southern, and local/national and global perspectives — which are explored at some length in Razavi's (1998) analysis of the debates around the "social clause" — have explicit and direct gender implications, even if the views of women workers are often missing from these deliberations. The fact that feminist analyses of factory work constantly move beyond poverty issues into the wider domain of power and subordination is testimony to the fact that gender issues in development cannot be reduced or "collapsed" into a welfare agenda, and also a reminder of the fact that for women workers, unlike most men workers, the process of becoming a worker and earning a monetary wage can be an empowering one by triggering off a sense of independence and self-worth, as well as facilitating new forms of solidarity (with co-workers) that are independent of kinship and residence.

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