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**mujer y desarrollo**

**N**ew contributions to  
the analysis of poverty:  
methodological and conceptual  
challenges to understanding  
poverty from a gender perspective

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## Abstract

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The overall aim of this paper is to outline the major methodological and conceptual challenges to understanding poverty from a gender perspective. The paper is divided into three main sections. Section one reviews the ways in which the frontiers of poverty analysis have been pushed forward and progressively 'engendered' during three decades of dedicated feminist research and activism in Latin America and other parts of the South. This includes discussion of past deficiencies and cumulative improvements in data on women's poverty, of the ways in which burgeoning research on gender has contributed to evolving conceptual approaches to poverty, and of key factors signalled as leading to gender-differentiated burdens of poverty. In section two, the discussion turns to outstanding barriers to understanding poverty from a gender perspective. The principal challenges identified include varying forms of gender exclusion in mainstream analytical and methodological approaches, continued inadequacies in data on gender and poverty, and the ways in which advocacy for directing resources to women has given rise to certain stereotypes which narrow the optic through which poverty is conceptualised and addressed. The third and final section offers thoughts on future directions in research and policy. How might gender and poverty investigation move forward in the 21<sup>st</sup> century so as to sharpen our instruments for measurement, and to better inform and influence policy interventions? In turn, to which areas might policy be most usefully directed? While Latin America is the main focus of analysis throughout the paper, given the global reach of discourses on gender and poverty, insights are also drawn from academic and policy discussions outside the region.

## Introduction

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The overall aim of this paper is to outline the major methodological and conceptual challenges to understanding poverty from a gender perspective. The paper is divided into three main sections. Section one provides a synopsis of the ways in which the frontiers of poverty analysis have been pushed forward and progressively ‘engendered’ during three decades of dedicated feminist research and activism in Latin America and other parts of the South. This includes discussion of past deficiencies and cumulative improvements in data on women’s poverty, of the ways in which mounting research on gender has contributed to evolving conceptual approaches to poverty, and of the parameters relevant to analysing gender differences in poverty and their causal mechanisms. While this growing body of theory and research has succeeded in winning recognition of the gendered nature of poverty in mainstream development circles, in some respects this has come at the price of narrowing the optic through which gender is conceptualised, portrayed and addressed. With this in mind, some attention is given in section two to dilemmas and tensions surrounding popular constructions about gender and poverty which have come to dominate enquiry and practice in the early 21<sup>st</sup> century. This centres mainly on the concept of the ‘feminisation of poverty’ (which refers, inter alia, to the growing share of poverty borne by women), and its links with increases in female household headship. Discussion in the second section of the paper also considers two further outstanding challenges to understanding poverty from a gender perspective, notably the persistent and/or partial insensitivity to gender within mainstream approaches to poverty analysis, and continued inadequacies in data on gender and poverty.

The third and final section offers thoughts on future directions in research and policy. How might gender and poverty investigation move forward in the 21<sup>st</sup> century so as to sharpen our instruments for measurement, and to better inform and influence policy interventions? In turn, to which areas should policy attention be best directed? While Latin America is the main focus of analysis throughout the paper, given the global reach of discourses on gender and poverty, insights are also drawn from academic and policy discussions outside the region.

## **Chapter 1: ‘Engendering’ poverty analysis: feminist contributions to the conceptualisation and measurement of poverty, 1970-2000**

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Poverty has never been a politically neutral concept, reflecting as it does the a priori assumptions of who is undertaking the evaluation, and the data used, or available, for the purpose. In short, poverty has always been open to different definitions, tools of measurement, and modes of representation. This said, in the last three decades there has been a discernible trend for approaches to poverty to have become more ‘holistic’. This has involved a shift from a narrow and static focus on incomes and consumption, to recognition of poverty as a multidimensional phenomenon, which, in addition to aspects of ‘physical deprivation’, encompasses non-material factors pertaining to ‘social deprivation’ such as self-esteem, respect, power and vulnerability. As part and parcel of this trajectory, the idea that poverty is solely an objectively-determined, material entity has given way to recognition that subjective experiences of poverty, and the processes which give rise to these experiences, must constitute part of the framework.<sup>1</sup> The importance of taking into account not only the subjectivity of poverty, but its inherently dynamic nature, has called

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<sup>1</sup> This has particular resonance in developing world contexts insofar as imposed, ‘objective’, universalising and preponderantly Eurocentric constructions and classifications of poverty have been regarded as ‘disempowering’ to people in the South. As asserted by Jackson (1997:152): ‘Poverty reduction appears in poststructuralist perspectives as an imperialist narrative, universalising, essentialising and politically sinister’ since it justifies ‘hegemonic development interventions’.



for less exclusive emphasis on quantitative approaches in favour of bringing more qualitative and participatory methods into the fold. Collectively these developments have opened up greater space for incorporating the hitherto 'invisible' dimension of gender into poverty analysis. As noted by Kabeer (1997:1):

'Poverty has not always been analysed from a gender perspective. Prior to the feminist contributions to poverty analysis, the poor were either seen as composed entirely of men or else women's needs and interests were assumed to be identical to, and hence subsumable under, those of male household heads'.

Leading on from this, the push for understanding the gender dimensions of poverty owes in no small measure to mounting feminist research and advocacy, which, from the 1970s onwards, has 'challenged the gender blindness of conventional poverty measurement, analysis and policy in a number of different ways' (Kabeer, 1997:1).

Given the immense importance of this thirty year legacy in on-going attempts to mainstream gender in methodological and conceptual frameworks for poverty, it is instructive to highlight the principal bodies of feminist literature which have had direct and/or indirect influences on shaping the 'engendering' of poverty analysis over time.

## **1.1 Major bodies of gender research with implications for poverty analysis**

### **1.1 (i) Early research on women and development: the UN decade (1975-1985)**

The earliest substantial work on gender with implications for thinking on poverty came with the United Nations Decade for Women (1975-1985). In drawing attention to the 'invisibility' of women in development, the UN Decade spawned unprecedented efforts to discover and expose what women did, and to explore how they fared in developmental change in comparison with men. Given prevailing concerns with economic growth at the time, most attention was directed to women's material well-being and their productive roles. Although arguably limited from a contemporary vantage point on poverty, this offered several new perspectives, one of which was to emphasise how women were consistently more disadvantaged than men in terms of income. Detailed survey work at the micro-level generated a considerable body of evidence on gender disparities in earnings, and on the processes which gave rise to those disparities such as inequalities in literacy and education, discrimination in labour markets, unequal gender divisions of unpaid work within the home, and the low social and economic value attributed to work performed by women.

A second set of perspectives on poverty emanating from this early research on women was that it revealed the difficulties of obtaining meaningful data on any aspect of women's lives (whether in respect of material privation or otherwise) from macro-level statistics. This called into question how data that were not sensitive to, nor disaggregated by, sex<sup>2</sup> could provide an effective basis for gender-aware policy interventions. This constituted a major impetus for calls made under the auspices of CEDAW (Convention on the Elimination of All Forms of Discrimination Against Women) (1979), not only for sex-disaggregated statistics but for indicators which measured changes between women and men over time (see Corner, 2003; Gaudart, 2002; also Box 1).

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<sup>2</sup> Corner (2003:2) makes the point that 'gender statistics' are better described as 'disaggregated by sex' rather than 'disaggregated by gender', since in reality, they involve disaggregation by biological sex, rather than 'gender' which is a contextually specific and socially constructed entity.

A third feature of early gender research with relevance for poverty analysis was growing recognition not only of the plurality of household configuration, but of internal differentiation within the idealised 'natural' household unit (nominally comprising a husband, wife and children). Research indicated, for example, that in directing development projects to male household heads, women either missed out as heads of household in their own right, or as members of male-headed arrangements. In the case of the latter, for instance, it became clear that increasing resources to male household heads did not automatically confer benefits to women and children. This raised questions about the relevance of 'the household' as a unitary, altruistic entity, and, ipso facto, as an appropriate target of interventions for the promotion of economic development and/or the alleviation of poverty (see also later).

Fourth, and finally, early gender research flagged up the paradox whereby women's considerable inputs to household survival went unmatched by social recognition, either within the context of their families and communities or in society at large. The frequently 'silenced' and 'hidden' nature of women's lives highlighted that there was more than a material dimension to gendered hardship and subordination. This, in turn, was an important element in stimulating more multidimensional analyses of poverty.

### **1.1 (ii) Gender and structural adjustment programmes**

A second wave of gender work with implications for poverty analysis came with the 'Lost Decade' of the 1980s.<sup>3</sup> A spate of research on the grassroots impacts of structural adjustment programmes in different parts of the world demonstrated unequivocally that the burdens of debt crisis and neoliberal reform were being shouldered unequally by women and men (see Elson, 1989; Moser, 1989; Safa and Antrobus, 1992). While the importance of 'unpacking' households to ascertain gendered dimensions of poverty had been an important feature of earlier research, mounting evidence for intra-household inequality during the 1980s gave rise to unprecedented criticism of the 'unitary household model'. The findings of empirical studies of structural adjustment were lent conceptual support by broader shifts in theorising about households associated with 'New Institutional Economics' and the attendant notion of domestic units as sites of 'cooperative conflict' (Sen, 1987b, 1990; also Dwyer and Bruce [eds.], 1988; Young, 1992; see also below).

During neoliberal restructuring, cut-backs in state services and subsidies (entailing reductions in public healthcare, declining investments in housing and infrastructure, rising prices of basic foodstuffs, and so on) transferred considerable costs to the private sector, and it was women who largely 'footed the bill' (Kanji, 1991). Shortfalls in household income required greater effort in domestic provisioning which gave women heavier burdens of reproductive work in their homes and communities (see Benería, 1991; Brydon and Legge, 1996; González de la Rocha, 1988a; Weekes-Vagliani, 1992). This burden was intensified by the increased time women were forced to spend on income-generating activities. Meanwhile, there was little evidence for a corresponding rise in the range and intensity of men's inputs to household survival (Chant, 1994; Langer et al., 1991; Moser, 1996; UNICEF, 1997). It became clear that it was impossible to analyse the poverty-related corollaries of structural adjustment without acknowledging gender. This, in turn, underlined the integral part that gender awareness should play in wider work on poverty.

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<sup>3</sup> The 'Lost Decade' (used mainly in relation to Latin America, but also to sub-Saharan Africa) refers to the fact that the 1980s saw a reversal in many of the advances in wealth and social welfare which countries had achieved in the years prior to the debt crisis.

### 1.1 (iii) Female-headed households and the ‘feminisation of poverty’

The need to ‘mainstream’ gender within poverty analyses was further reinforced by research on growing numbers of women-headed households<sup>4</sup> both during and after the ‘Lost Decade’. Much of this research placed emphasis on the disadvantage borne by female-headed units in comparison with their male-headed counterparts. Women-headed households were linked definitively with the concept of a ‘global feminisation of poverty’, and assumed virtually categorical status as the ‘poorest of the poor’ (see Acosta-Belén and Bose, 1995; Bullock, 1994; Buvinic, 1995:3; Buvinic and Gupta, 1993; Kennedy, 1994; Tinker, 1990; UNDAW, 1991; also Box 2). In broader work on poverty, and especially in policy circles, the poverty of female-headed households effectively became a proxy for women’s poverty, if not poverty in general (see Jackson, 1996; also May, 2001:50). As summarised by Kabeer (2003:81): ‘Female headship rapidly became the accepted discourse about gender and poverty among international agencies’.

Women-headed households were typecast as the ‘poorest of the poor’ on grounds of their allegedly greater likelihood of being poor, and of experiencing more pronounced degrees of indigence than male-headed units (see BRIDGE, 2001; Buvinic and Gupta, 1993; González de la Rocha, 1994b:6-7; Moghadam, 1997; Paolisso and Gammage, 1996). These assumptions intermeshed with the notion that poverty was a major cause of female household headship (through forced labour migration, conjugal breakdown under financial stress, lack of formal marriage and so on) (Fonseca, 1991:138). In turn, female headship itself was regarded as exacerbating poverty since women were time- and resource-constrained by their triple burdens of employment, housework and childcare, because they were discriminated against in the labour market, because they were unable to enjoy the ‘dual earner’ status so vital to riding out the pressures attached to neoliberal economic restructuring, and because they lacked the valuable non-market work provisioned by ‘wives’ in male-headed units (Folbre, 1994; Fuwa, 2000; ILO, 1996; Safa and Antrobus, 1992; UNDAW, 1991). More recently, an additional factor held to account for the disadvantage of female-headed households, albeit less documented in the South than the North, has been the ‘gendered ideology of the welfare state and its bureaucracy’ (see Bibars, 2001; also Box 3). There has also been a remarkably persistent notion that poverty is inter-generationally perpetuated because female heads cannot, purportedly: ‘... properly support their families or ensure their well-being’ (Mehra et al., 2000:7).

While it is undeniable that women suffer disproportionately from social and economic inequalities, whether these disadvantages can automatically be mapped onto women-headed households is less certain. Indeed, an increasing number of studies from various parts of the South, based on both macro- and micro-level data, suggests that in terms of income—the most persistent and widely used indicator of poverty—there is no systematic link between these phenomena (see CEPAL, 2001:20; Chant, 1997b, 2003; Fuwa, 2000; Geldstein, 1997; González de la Rocha, 1999; IFAD, 1999; Kennedy, 1994:35-6; Menjívar and Trejos, 1992; Moghadam, 1997:8; Moser, 1996;

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<sup>4</sup> While there are several debates in the gender and development literature on the desirability (or otherwise) of generating definitions which might be universally applicable, the most common definition of ‘household’ for developing societies (and that favoured by international organisations such as the United Nations), is one which emphasises co-residence. In short, a household is designated as comprising individuals who live in the same dwelling and who have common arrangements for basic domestic and/or reproductive activities such as cooking and eating (see Chant, 1997a: 5 et seq for discussion and references). In turn, a ‘female-headed household’ is classified in most national and international data sources as a unit where an adult woman (usually with children) resides without a male partner. In other words, a head of household is female in the absence of a co-resident legal or common-law spouse (or, in some cases, another adult male such as a father or brother) (ibid.). Although the majority of female-headed households are lone mother households (i.e. units comprising a mother and her children), ‘female household headship’ is a generic term which it covers many other sub-groups such as grandmother-headed households, female-headed extended arrangements and lone female units (Chant, 1997a: Chapter 1; also Bradshaw, 1996a; Folbre, 1991; Fonseca, 1991). It is also important to stress that a ‘lone mother’ is not necessarily an ‘unmarried mother’, but is equally, if not more, likely, to be a woman who is separated, divorced and/or widowed (Chant, 1997a: Chapter 6).

Quisumbing et al., 1995; Wartenburg, 1999). Moreover, there would not appear to be any obvious relationship between levels of poverty at a national or regional scale and proportions of female heads, nor between trends in poverty and the incidence of female headship (see Chant, 2003; Chant with Craske, 2003: Chapter 3; Varley, 1996: Table 2). In fact, as summed-up by Arriagada (1998:91) for Latin America: ‘... the majority of households with a female head are not poor and are those which have increased most in recent decades’. Other authors have also stressed how women-headed households are just as likely to be present among middle- and/or upper-income populations as among low-income groups (see Appleton, 1996 on Uganda; Geldstein, 1994, 1997 on Argentina; González de la Rocha, 1999:31; Willis, 2000:33 on Mexico; Hackenberg et al., 1981:20 on the Philippines; Kumari, 1989:31 on India; Lewis, 1993:23 on Bangladesh; Wartenburg, 1999:78 on Colombia; Weekes-Vagliani, 1992:42 on the Côte d’Ivoire). Aside from socio-economic status, the diversity of female-headed households in respect of age and relative dependency of offspring, household composition, and access to resources from beyond the household unit (from absent fathers, kinship networks, state assistance and the like), precludes their categorical labelling (see Chant, 1997a,b; Feijoó, 1999; Kusakabe, 2002; Oliver, 2002; Varley, 2002; Whitehead and Lockwood, 1999; also Box 4).

This growing body of critical analysis on female household headship and poverty has had major impacts on poverty research more generally. It has been crucial, for example, in fuelling momentum for examining gender differences in poverty burdens and the processes giving rise to those differences. It has further highlighted the need to disaggregate households in poverty evaluations, and to consider poverty from a broader optic than levels of earned income (see Cagatay, 1998; Fukuda-Parr, 1999; Whitehead and Lockwood, 1999). Debates on female household headship and poverty have also brought issues of ‘power’ and ‘empowerment’ to the fore, insofar as they have stressed how capacity to command and allocate resources is as, if not more, important than the power to obtain resources, and that there is no simple, unilinear relationship between access to material resources and female empowerment.

### **1.1 (iv) Women’s ‘empowerment’**

A fourth body of gender research with particular relevance for poverty is that which has concentrated on ‘women’s empowerment’. Since the early 1990s, the term ‘empowerment’ has become widespread within the gender and development lexicon, with the stated aim of an increasing number of development interventions, particularly those relating to poverty reduction, being to ‘empower women’. One of the most common objectives is to enhance women’s capacity to make choices, which is often envisaged as best achieved through raising their access to resources (see UNDP, 1995; UNIFEM, 2000). Although definitions of empowerment remain contested, as do the implications of empowerment, both for women themselves, and for their relationships with others (see Kabeer, 1999; Oxaal with Baden, 1997; Parpart, 2002; Rowlands, 1996; Tinker, forthcoming; UNIFEM, 2000), issues with special relevance for poverty include (1) the idea that empowerment is a process, rather than an end-state, (2) that empowerment cannot be ‘given’ but has to come ‘from within’, (3) that empowerment comprises different dimensions and works at different scales (the personal, the inter-personal, the collective, the local, the global), and (4) that ‘measuring’ empowerment requires tools which are sensitive to the perceptions of ‘insiders’ at the grassroots, and to the meanings of empowerment in different cultural contexts (see Kabeer, 1999; Rowlands, 1996). Following on from this, weight is added to the idea that poverty is not a static, but a dynamic phenomenon; that the alleviation or eradication of poverty cannot be answered by ‘top-down’, ‘one-off’, non-participatory approaches; that WID approaches (which tend to focus on women only, and as a homogeneous constituency) need to be replaced by GAD approaches (which conceptualise gender as a dynamic and diverse social construct, and which encompass men as well as women); and that poverty is unlikely to be addressed effectively by a unilateral focus on

incomes, notwithstanding that employment and wages are widely recognised as key to people's ability to overcome poverty (see González de la Rocha, 2003; Moser, 1998).

The contributions of this, along with the other bodies of gender research identified, to general analyses of poverty are now explored in relation to three interrelated issues:

- the ways in which a gender perspective has influenced how poverty is defined and conceptualised;
- the impacts of gender analysis on how poverty is measured;
- the contributions of gender research to understanding the uneven distribution of poverty-generating processes between women and men.

## **1.2 The contribution of a gender perspective to definitions and conceptualisations of poverty**

Although income remains uppermost in macro-level evaluations of poverty, the last two decades have witnessed rising support in academic and policy circles for broadening the criteria used in poverty definitions (Baden with Milward, 1997; Baulch, 1996; Chambers, 1995; Moser et al., 1996a,b; Razavi, 1999; Whitehead and Lockwood, 1999; World Bank, 2000; Wratten, 1995).

### **1.2 (i) Poverty as a multidimensional and dynamic process: capabilities, assets and livelihoods**

Work on gender has played a major role in calls to acknowledge poverty as a dynamic and multidimensional concept on grounds that static profiles of income and consumption present only part of the picture. Acknowledging that wages are a 'trigger for other activities', and a 'motor of reproduction' (González de la Rocha, 2003:21), paucity of income may be offset to some degree if people reside in adequate shelter, have access to public services and medical care, and/or possess a healthy base of 'assets'. Assets are not only economic or physical in nature (labour, savings, tools, natural resources, for instance), but encompass, inter alia, 'human capital' such as education and skills, and 'social capital' such as kin and friendship networks and support from community organisations (see also Cagatay, 1998; Chambers, 1995; Moser, 1996, 1998; Moser and McIlwaine, 1997; McIlwaine, 1997; Wratten, 1995; also Box 5).

Key concepts within the evolution of a more holistic approach to poverty include 'entitlements' and 'capabilities' (Sen, 1981, 1985, 1987a), and notions of 'vulnerability' and 'poverty as process' (Chambers, 1983, 1989; see also Haddad, 1991). Along with 'assets', these concepts have become progressively enfolded in the diagnostic and operational arena of 'livelihoods' (see Chambers, 1995; Moser, 1998; Rakodi, 1999; Rakodi with Lloyd-Jones [eds], 2002). Carole Rakodi's (1999) exposition of the 'capital assets' approach to livelihoods, for example (see Box 5) focuses on stocks of capital of varying types (human, social, natural, physical and financial) which can be stored, accumulated, exchanged or depleted and put to work to generate a flow of income or other benefits. People's assets and capabilities influence their poverty in the short- and long-term, including their ability to withstand economic and other shocks (ibid.). As further articulated by UNPFA (2002):

'People's health, education, gender relations and degree of social inclusion all promote or diminish their well-being and help to determine the prevalence of poverty. Escaping poverty depends on improving personal capacities and increasing access to a variety of resources, institutions and support mechanisms'.

There is also a strong distributional emphasis in livelihoods frameworks, with González de la Rocha and Grinspun (2001:59-60) observing that:

‘Analysing vulnerability requires opening up the household so as to assess how resources are generated and used, how they are converted into assets, and how the returns from these assets are distributed among household members’ (emphasis in original).

Depending on the local environment, social and cultural context, power relations within households and so on, people may manage assets differently, although on the whole ‘households aim at a livelihood which has high resilience and low sensitivity to shocks and stresses’ (Rakodi, 1999:318).

A focus on what the poor aspire to, what they have, and how they make use of it, allows for a much more holistic, person-oriented, appreciation of how survival is negotiated (Moser, 1998). By the same token, there are serious dangers in over-emphasising people’s agency and resourcefulness, especially given the cumulative disadvantages which have faced low-income groups during two decades of neoliberal economic restructuring (see González de la Rocha, 2001, 2003). Similarly, we must not forget that lack of income and lack of capacity and choice are often strongly related:

‘Poor people acutely feel their powerlessness and insecurity, their vulnerability and lack of dignity. Rather than taking decisions for themselves, they are subject to the decisions of others in nearly all aspects of their lives. Their lack of education or technical skills holds them back. Poor health may mean that employment is erratic and low-paid. Their very poverty excludes them from the means of escaping it. Their attempts even to supply basic needs meet persistent obstacles, economic or social, obdurate or whimsical, legal or customary. Violence is an ever-present threat, especially to women’ (UNFPA, 2002).

Leading out of this, where gender research has perhaps made the most significant inroads within exhortations to embrace the multidimensionality of poverty is in respect of highlighting issues of power, agency and subjectivity.

## **1.2 (ii) Power, agency and subjectivity**

An important element stressed by feminist research on power and agency within poverty evaluation is that of ‘trade-offs’. ‘Trade-offs’ refer to the idea that tactical choices may be made by individuals between different material, psychological and symbolic aspects of poverty (see Chant, 1997b; Jackson, 1996; Kabeer, 1997). As demonstrated by empirical evidence from Mexico and Costa Rica, for example, women who split-up with their spouses may resist men’s offers of child support (where this is forthcoming), because this compromises their autonomy. In other words, some women prefer to cope with financial hardship than pay the price that maintenance can bring with it, such as having to engage in on-going emotional or sexual relationships with ex-partners (see Chant, 1997b:35). Similarly, women who choose to leave their husbands may have to make substantial financial sacrifices in order to do so. This not only means doing without male earnings, but, in cases where women move out of the conjugal home, forfeiting property and other assets such as neighbourhood networks in which considerable time, effort and/or resources may have been invested (Chant, 1997a, 2001). Although these actions may at one level lead to an exacerbation of material poverty, and, accordingly, attach a high price to women’s independence (see Jackson, 1996; Molyneux, 2001: Chapter 4), the benefits in other dimensions of women’s lives may be adjudged to outweigh the costs. While women’s lower average wages clearly inflate these costs, as argued by Graham (1987:59): ‘...single parenthood can represent not only a different but a preferable kind of poverty for lone mothers’ (see also UNDAW, 1991:41).

In Guadalajara, Mexico, for example, González de la Rocha (1994a:210) asserts that although lone-parent units usually have lower incomes than other households, the women who head them 'are not under the same violent oppression and are not as powerless as female heads with partners'. In other parts of Mexico, such as Querétaro, León and Puerto Vallarta, female household heads often talk about how they find it easier to plan their budgets and expenditure when men have departed, even when their own earnings are low and/or prone to fluctuation. They also claim to experience less stress and to feel better able to cope with material hardship because their lives are freer of emotional vulnerability, of physical violence, of psychological and financial dependence, and of subjection to authority and fear (Chant, 1997a,b).

The critical point here is that even if women are poorer in income terms on their own than they are as wives or partners in male-headed households, they may feel they are better off and, importantly, less vulnerable (Chant, 1997b:41). These observations underline the argument that poverty is constituted by more than income, encompasses strong perceptual and subjective dimensions, and is perhaps more appropriately conceived as a package of assets and entitlements within which the power, inter alia, to manage expenditure, to mobilise labour, and to access social and community support, are vital elements (see Chambers, 1983, 1995; Lewis, 1993; Lind, 1997; Sen, 1987a,b).

### **1.3 The contribution of a gender perspective to measuring poverty**

In terms of the measurement of poverty, gender research has had three major impacts. First, it has assisted in broadening indicators of poverty used in macro-level assessments. Second, it has fuelled the idea of breaking with the convention of using the 'household' as the unit of measurement in income-based poverty profiles in favour of concentrating on individuals within domestic groupings. Third, it has stressed how poverty can only be meaningfully evaluated if people's own views on their 'condition' are brought into the picture, notwithstanding that regardless of subjective experiences, 'objectively' determined levels of material privation still matter.

#### **1.3 (i) Broadening the indicators used in macro-level poverty assessments**

As far as quantitative macro-level assessments are concerned, an important step towards more holistic conceptualisations of poverty has been made through composite indices formulated by the United Nations Development Programme (UNDP). The first of these —the Human Development Index (HDI)— appeared in 1990. Based on the premise that 'people and their lives should be the ultimate criteria for assessing the development of a country, not economic growth', the HDI focuses on income, literacy and life expectancy (UNDP, 1990, 2002). Insofar as the HDI provides some indication of how national income is used, this goes further than per capita Gross National Product (GNP) which merely measures income per se, and which was hitherto the most widely used indicator of national 'development'.

A second UNDP index with particular relevance for poverty is the Human Poverty Index (HPI) which came into being in 1997. The HPI evolved out of the 'Capability Poverty Measure' (CPM) developed on the basis of the work of the economist, Amartya Sen, which stressed that 'Income and commodities were important only in as much as they contributed to people's capabilities to achieve the lives they wanted ("functioning achievements")' (Kabeer, 2003:84; see

also Womenaid International, 1996).<sup>5</sup> In accordance with the UNDP's concept of human development as a process of 'widening people's choices and the level of well-being they achieve' (UNDP, 1997:13), the HPI eschews the idea that poverty can be reduced to income, and posits a broader measure of privation relating to quality of life, which embraces health, reproduction and education (*ibid.*; see also Fukuda-Parr, 1999; May 2001). As described by the UNDP (2002:13):

'Fundamental to human choices is building human capabilities: the range of things that people can do or be. The most basic capabilities for human development are leading a long and healthy life, being educated, having access to the resources needed for a decent standard of living and being able to participate in the life of one's community' (emphasis added).

Instead of examining the average state of people's capabilities, the HPI seeks to identify the proportion of people who lack basic, or minimally essential human capabilities, which, as summarised by UNFPA (2002) are 'ends in themselves and are needed to lift one from income poverty and to sustain strong human development'. For example, poor health can be as much a cause as well an effect of income poverty insofar as it 'diminishes personal capacity, lowers productivity and reduces earnings' (*ibid.*). As such, by incorporating different dimensions of 'longevity', 'knowledge' and 'living standards' (see UNDP, 2000:147), both the HDI and HPI not only constitute a positive endorsement of the need to conceptualise poverty as a multidimensional and dynamic entity, but stress that the 'ends' or 'outcomes' of poverty are, in important ways, also means to negotiate well-being.

Although the HDI and HPI do not comprise a gender component, gender dimensions of poverty, such as disparities in income and capabilities between women and men, have been made visible at international levels through the UNDP's Gender-related Development Index (GDI), and the Gender Empowerment Measure (GEM) (see Bardhan and Klasen, 1999; also Dijkstra and Hanmer, 2000; UNFPA, 2002). Originating in 1995, and subject to on-going revision and refinement, the GDI adjusts the HDI for gender disparities in the three main indicators making up the Human Development Index (HDI), namely:

- (i) 'longevity' (female and male life expectancy at birth),
- (ii) 'knowledge' (female and male literacy rates, and female and male combined primary, secondary and tertiary enrolment ratios), and
- (iii) 'decent standard of living' (estimated female and male earned income, to reflect gender-differentiated command over resources) (UNDP, 2002:23).

In all countries in the world, the GDI is lower than the HDI which means that gender inequality applies everywhere, albeit to different degrees and in different ways (*ibid.*; see also Table 1).

While the GDI focuses on the impact of gender inequality on human development, the GEM measures equity in agency—in other words, the extent to which women are actually able to achieve equality with men (Bardhan and Klasen, 1999). More specifically, the GEM aims to assess gender inequality in economic and political opportunities and decision-making, and comprises four main indicators:

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<sup>5</sup> The UNDP (1997:13) defines 'functionings' as referring to the 'valuable things that a person can do or be', such as being well-nourished, having long life expectancy, and being a fully integrated and active member of one's community. In turn, the 'capability' of a person 'stands for the different combinations of functionings the person can achieve', and their freedom to achieve various functionings (*ibid.*).



- (i) The share of parliamentary seats occupied by women,
- (ii) The proportion of legislators, senior officials and managers who are women.
- (iii) The female share of professional and technical jobs.
- (iv) The ratio of estimated female to male earned income (see UNDP, 2002; also Table 2).

The UNDP gender indices, while still crude and clearly limited by their reliance on 'observable', quantitative data, can at least be regarded as important complementary tools in the analysis of gender gaps, as well as indicating the greater prominence given to gender in national and global accounting of economic development and poverty. Indeed, as pointed out by Dijkstra and Hanmer (2000), published indicators of gender inequality have huge policy relevance since they draw governments' attention to gender inequalities and can potentially galvanise them into action. In turn, gender-sensitive indicators can contribute to broader theoretical debates about the relationships between gender and macro-economic growth, including whether gender equality contributes to economic development.

This said, it is important to recognise that the statistics on which the UNDP gender indices are based remain limited. For example, data on women's income relative to men's are restricted to formal sector remuneration (Kabeer, 2003:87), yet, since women are disproportionately concentrated in informal economic activity, this does not provide an accurate picture of male-female earning differentials (see Arriagada, 1998:91; Baden with Milward, 1997; Chant, 1991a, 1994; Fuwa, 2000:1535; Leach, 1999; Sethuraman, 1998; Tinker, 1997; also Table 3).<sup>6</sup> The matter is complicated still further in light of women's considerable inputs into household labour, and other unpaid activities such as subsistence farming, which play a crucial role in underpinning livelihoods. Indeed, while gender research has stressed the importance of incorporating the non-market work of women in poverty assessments and the like, this tends to remain undervalued, if not invisible. Although there has been some progress towards improving the gender-sensitivity of enumeration in the last two decades, such as making greater recourse to time use statistics and providing gender training for those responsible for collecting data (see Corner, 2002, 2003; also below), assigning a precise, quantified value to women's work outside the realm of the formal paid economy represents one of the biggest methodological challenges for the 21<sup>st</sup> century (see Benería, 1999; UNDP, 1995; also below).<sup>7 8</sup>

### 1.3 (ii) The importance of household disaggregation

With regard to the second main impact of gender research on poverty measurement—that of the need to disaggregate households—two sets of arguments have been especially persuasive. One is that since aggregate household incomes disregard the matter of size, larger households can appear better off than smaller ones. This is particularly pertinent to comparative analyses of

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<sup>6</sup> Women's disproportionate concentration in informal employment seems to be becoming more marked over time. In Mexico, for example, official documentation connected with the National Women's Programme (*Programa Nacional de la Mujer 1995-2000*) noted that in the context of on-going increase in women's workforce participation in the 1990s, those in informal income generating activities (here described as 'non-waged' work), rose from 38% to 42% of the national female labour force between 1991 and 1995 (Secretaría de Gobernación, 1996:27-8; see also Chant with Craske, 2003: Chapter 8 for a more general discussion of the informalisation and feminisation of employment in Latin America in recent decades).

<sup>7</sup> Despite the difficulties involved in calculation, in 1995, the UNDP estimated that the combined value of the unpaid work of women and men, together with the underpayment of women's work in the market was in the order of \$16 trillion US, or about 70% of global output. Of the \$16 trillion identified, approximately \$11 trillion was estimated to be constituted by the 'non-monetised, invisible contribution of women' (UNDP, 1995:6).

<sup>8</sup> UNIFEM South Asia in collaboration with other UN Agencies provided support to the Central Statistical Organisation in India and to the Central Bureau of Statistics in Nepal to 'engender' the 2001 national censuses in both countries. In the case of Nepal, one innovation was the elimination of traditional labour force questions in order to take into account unpaid work, mainly performed by women (see Corner, 2003).

male- and female-headed households. While the use of total household incomes makes female-headed households more visible in conventional statistics (Kabeer, 1996:14), the danger is to downplay poverty among women in male-headed units. Although per capita income figures (derived by dividing household incomes by the number of household members) may not say very much about distribution, since they assume equality (Razavi, 1999:412), they at least provide a closer approximation of the potential resources individuals have at their disposal (see Baden with Milward, 1997; Chant, 1997b; González de la Rocha, 1994b). Indeed, empirically-based gender research has shown that differences in per capita incomes are often negligible between male- and female-headed units and/or may be higher in the latter, precisely because they are smaller and incomes go further (see Chant, 1985; Kennedy, 1994; Paolisso and Gammage, 1996:21; Shanthi, 1994:23). Having said this, we must remember that the consumption needs of individual household members often vary according to age (Lloyd and Gage-Brandon, 1993:121),<sup>9</sup> and that larger households may benefit from economies of scale in respect of 'household establishment costs' such as housing and services (Buvinic, 1990, cited in Baden with Milward, 1997).<sup>10</sup>

A second, and perhaps even more compelling reason to disaggregate households for the purposes of measuring poverty, stems from observations concerning inequitable intra-household resource distribution and the phenomenon of 'secondary poverty'. Empirical work on inequalities in income and consumption within households has fuelled a fertile conceptual vein of research which has discredited the idea that households are unitary entities operating on altruistic principles and replaced this with the notion they are arenas of competing claims, rights, power, interests and resources. Popularised most widely in the shape of Amartya Sen's 'cooperative conflict' model (Sen, 1987b, 1990), this perspective requires scrutiny of what goes on inside households rather than leaving them as unproblematised, undeconstructed 'blank boxes', or accepting them as entities governed by 'natural' proclivities to benevolence, consensus and joint welfare maximisation (see also Baden with Milward, 1997; Cagatay, 1998; González de la Rocha, 2003; Hart, 1997; Kabeer, 1994: Chapter 5; Lewis, 1993; Molyneux, 2001: Chapter 4). As argued by Muthwa (1993:8):

'... within the household, there is much exploitation of women by men which goes unnoticed when we use poverty measures which simply treat households as units and ignore intra-household aspects of exploitation. When we measure poverty ... we need measures which illuminate unequal access to resources between men and women in the household'.

Acknowledging the need to avoid essentialising constructions of 'female altruism' and 'male egoism', studies conducted in various parts of the world reveal a tendency for male household heads not to contribute all their wage to household needs, but to keep varying proportions for discretionary personal expenditure (see Benería and Roldan, 1987:114; Dwyer and Bruce [eds], 1988; Kabeer, 2003:165 et seq; Young, 1992:14). Men's spending is often on 'non-merit' goods such as alcohol, tobacco and extra-marital affairs, which not only deprives other household members of income in the short-term, but can also exact financial, social and psychological costs

<sup>9</sup> To some extent this is addressed by the use of Adult Equivalence Scales which refine per capita measures on the basis of the expected consumption needs of different household members at different stages of the life course. For example, a value of 1 is normally assigned to an adult equivalent unit (AEU), which is, by definition, an adult male aged 23-50 years. In turn, an adult woman of same age is assigned a value of 0.74, an infant of up to 6 months old, a value of 0.24 and so on. There are problems with AEU methodology, however, as identified in a recent poverty study of The Gambia. One major one is that the adult female AEU is based on a non-pregnant and non-lactating woman with medium and basal metabolic rate. Yet in The Gambia (and many other sub-Saharan African countries) women grow around 80% of food for household consumption, and are often pregnant and lactating (see GOG, 2000:26-7). As such, their consumption needs are considerably higher than nominally projected by the standard adult female AEU.

<sup>10</sup> Building on a point made earlier in the paper, it is also important to note that households are not 'bounded entities', and may receive injections of income from external sources, such as migrant family members, and transfer payments from absent fathers and/or state organisations (see Bibars, 2001; Bruce and Lloyd, 1992; Chant, 1997b, 1999; Chant and McIlwaine, 1995; Safa, 2002; Ypeij and Steenbeek, 2001).

down the line (Appleton, 1991; Chant, 1997a; Hoddinott and Haddad, 1991; Kabeer, 1994:104). For example, where men become ill or unable to work as a result of prolonged drinking, the burden for upkeep falls on other household members, who may be called upon to provide healthcare in the home, and/or to pay for pharmaceuticals and formal medical attention (see Chant, 1985, 1997a). While not denying that expenditure on extra-domestic pursuits may form a critical element of masculine identities in various parts of the world,<sup>11</sup> and may even enhance men's access to the labour market (through social networks and the like), for women and children in situations of low incomes and precarious livelihoods, the implications can clearly be disastrous (see Tasies Castro, 1996).

### **1.3 (iii) The importance of participatory methodologies**

Integral to the call for intra-household scrutiny, and to consider factors beyond income per se, such as differential control over and access to resources, participatory assessments have been regarded as crucial to the gendered analysis of poverty (see Kabeer, 1996:18 et seq; Moser et al., 1996b:2).

Participatory poverty assessments (PPA) have their origin in participatory rural appraisal methodologies (PRA), which, in turn, have drawn on disciplinary traditions such as applied anthropology and participatory action research (May, 2001:45). PPA methodology is based on 'outsiders' (NGO personnel, for example) as 'facilitators', with local people acting not so much as 'informants' but 'analysts' (ibid.). PPAs have increasingly been used in a range of contexts. One of the largest PPA projects to date has been that of the World Bank's 'Voices of the Poor' study which was undertaken in 60 countries for the *2000/2001 World Development Report* (see World Bank, 2000:16). From the point of view of gender, the implementation, interpretation and use of this methodology leaves much to be desired, as discussed later. None the less, for multilateral organisations to have taken on board PPAs (in whatever form), is arguably significant in light of their long-standing, and virtually exclusive, allegiance to more conventional, quantitative tools of poverty analysis.

### **1.4 Gender differences in poverty burdens and poverty-generating processes**

Moving on to the question of what gender research has revealed vis-à-vis gender differences in poverty burdens, from the earliest days of the UN Decade for Women, attention has been drawn to income inequality between men and women. This 'gender gap' in poverty, described as a 'tragic consequence of women's unequal access to economic opportunities' (UNDP, 1995:36), is also argued to have widened over time. At the Fourth World Conference on Women in Beijing, for example, it was claimed that poverty increasingly had a 'woman's face', and that around 70% of the world's 1.3 billion people in poverty were female (DFID, 2000:13). This seems somewhat paradoxical given dedicated post-1985 development policy to enhance women's equality and empowerment (Longwe, 1995:18), not to mention on-going increases in women's economic activity rates (see also Perrons, 1999 on the European Union). By the same token, a significant check on progress undoubtedly owes to the fact that rising female labour force participation has coincided with increased informalisation and insecurity in employment in general, and no significant diminution of gender disparities in occupational status, wages or benefits (see Standing,

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<sup>11</sup> This point is particularly resonant at the present time, with recent enquiry into men and masculinities in Latin America and other parts of the South revealing growing pockets of economic and labour market vulnerability among low-income males (Arias, 2000; Chant, 2000, 2002; Escobar Latapí, 1998; Fuller, 2000; Gutmann, 1996; Kaztman, 1992; Silberschmidt, 1999; Varley and Blasco, 2000).

1999; also Cerrutti, 2000; Elson, 1999; Pearson, 1998). On top of this, in many societies, women's levels of health, education and social participation remain lower than men's due to the interaction between material poverty with gender-based discrimination (UNFPA, 2002; also Johnsson-Latham, 2002). In light of this assemblage of factors, the 'persistent and increasing burden of poverty on women' was not only accorded priority as one of twelve critical areas of concern within the 1995 Global Platform for Action (see DFID, 2000:13), but was further implicated in the prominent featuring of gender and poverty considerations in the eight United Nations Millennium Development Goals (MDGs) (see Kabeer, 2003).

Although, as noted earlier, defining poverty, not to mention gendered experiences of poverty, is fraught with difficulties, some of the processes which place women at an above-average risk of poverty are fairly undisputed. These include women's disadvantage in respect of poverty-related entitlements and capabilities (education, skills, access to land and property and so on), their heavier burdens of reproductive labour and the low valuation of this labour, limited representation in public political life, and discrimination and disadvantage in the workplace (see Kabeer, 2003; Moghadam, 1997). These impact in various and important ways on the relative poverty of women, which, as identified by Bradshaw and Linneker (2003:6), is shaped by three main factors: first, that women have fewer possibilities to translate work into income; second, that when women do have income they find it more difficult to transform this into decision-making capacity; and third, that when women do make decisions these are seldom to enhance their own well-being but are more likely to be oriented to improving the well-being of others.

Leading on from this, gender research, as we have seen, has not only signalled the importance of gender discrimination in the 'public' sphere of politics, law, the labour market and so on, but has also stressed the importance of gender socialisation and intra-household power relations and resource distribution. For example, even where women earn 'decent incomes' they may not be able to control their earnings because of appropriation by men. As described by Blanc-Szanton (1990:93) for Thailand, the cultural acceptability for husbands to go gambling and drinking with friends after work and to demand money from their wives in order to do so, means that some women stay single to avoid falling into poverty (see also Bradshaw, 1996a on Honduras; Fonseca, 1991 on Brazil). In turn, women's earnings may not translate into greater personal consumption and well-being because it is undercut by men withholding a larger share of their own earnings when women go out to work. In poor communities in Honduras, for example, where men tend to retain a larger share of their income when spouses are working (Bradshaw and Linneker, 2003:30), around one-third of the income of male heads may be withheld from collective household funds (Bradshaw, 1996b). In some instances in Nicaragua and Mexico, this inflates to 50% (Bradshaw, 2002:29; González de la Rocha, 1994b:10). A similar situation is found in the Philippines where the limited contributions of men to household finances mean that even if female-headed households have lower per capita incomes than male-headed units, the amount available for collective household expenditure is usually greater (Chant and McIlwaine, 1995:283). Since male heads may command a larger share of resources than they actually bring to the household it is clear that the notional advantages of 'dual earner' households are cancelled out, and that, economically speaking, female headship may not be unequivocally punitive (see Folbre, 1991:108; also Baylies, 1996:77). This is reinforced by the fact that financial contributions from men may be so irregular that it makes for excessive vulnerability on the part of women, who have no guarantees from one day to the next whether they will be able to provision for their families. In turn, many women may be forced into borrowing and indebtedness in order to get by (see Chant, 1997a: 210).

Adding to this vulnerability among women is the fact that constructions of masculinity in some cultures make some men unwilling, for reasons of pride, honour, sexual jealousy and so on, to let the female members of their households share in the work of generating income. Even in

Mexico, where women's labour force participation increased massively during the years of the debt crisis, and has continued rising subsequently, a number of men adhere to the 'traditional' practice not only of forbidding their wives to work, but daughters as well, especially in jobs outside the home (see Benería and Roldan, 1987:146; Chant, 1994, 1997b; Proctor, 2003:303; Townsend et al., 1999:38; Willis, 1993:71; see also Bradshaw and Linneker, 2001:199 on Honduras). Failure to mobilise the full complement of household labour supply not only results in lower incomes and higher dependency ratios (i.e. greater numbers of non-earners per worker), but greater risks of destitution, especially where households are reliant on a single wage. Indeed, while by no means the case with all male-headed households, it is interesting that despite the pervasiveness of the 'poorest of the poor' stereotype, and the fact that women face so many disadvantages in society and in the labour market, detailed case study work at the grassroots suggests that relative to household size, female-headed households may have more earners (and earnings) than their male-headed counterparts. As such, dependency burdens are often lower, and per capita incomes higher in female-headed households (Chant, 1997b; Selby et al., 1990:95; Varley, 1996: Table 5). In turn, in-depth surveys of sons and daughters within female-headed households frequently reveal comparable, if not greater (and less gender-biased) levels of nutrition, health and education (see Blumberg, 1995; Chant, 1997a, 1999; Engle, 1995; Kennedy, 1994; Moore and Vaughan, 1994; Oppong, 1997). This not only means greater well-being in the short-term, but, given investments in human capabilities, also encompasses potential for greater empowerment and socio-economic mobility in the longer term.

In brief, household-level research has demonstrated that there is often as much going on within the home, as outside it, which determines women's poverty, well-being and power. It has not only greatly illuminated the nature of poverty-inducing processes, but also shown the dangers of allowing gender to 'fall into the poverty trap', or, in other words, to assume synonymity between 'being female' and 'being poor' (Jackson, 1996). One of the most significant contributions has been to reveal how female household headship is often erroneously construed as a risk factor for women themselves and for the poverty of younger generations (see Chant, 2001; González de la Rocha and Grinspun, 2001:61). While poverty-generating processes are frequently seen to reside in women's social and economic position in society at large, somewhat ironically perhaps, it appears that their domestic relationships with men can aggravate this situation. While there is little currency to be gained from adopting a counter-stereotypical stance that advocates female household headship as a 'panacea for poverty' and/or as an 'ideal model for female emancipation' (Feijoó, 1999:162; see also Chant, 1999), the evidence suggests that in some cases, 'going it alone' (Lewis, 1993), can place women in a better position to challenge the diverse range of factors which threaten their economic security and general well-being.

## **Chapter 2: Outstanding challenges to understanding poverty from a gender perspective**

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Having documented the influences of feminist research and advocacy on conceptualisations of, and methodological approaches to, poverty, it is important to recognise that several limitations remain, of which three in particular stand out. These are, first, that despite the broadening and diversification of analytical frameworks for poverty, dominant contemporary approaches still fall short of capturing the vast spectrum of factors pertinent to gendered experiences of privation. Second, data on gender and the many different dimensions of poverty remain deficient. Third, advocacy for directing resources to women has often been pegged to stereotypes that narrow the optic through which gendered poverty is conceived, represented and acted upon.

### **2.1 Limitations of dominant approaches to poverty analysis**

Despite the immensely nuanced insights brought to bear by feminist research on gender and poverty, the three dominant ‘mainstream’ approaches to poverty analysis remain ‘gender-blind’ in a number of ways. These three approaches are characterised by Kabeer (2003:79 et seq) as follows:

- (i) the 'poverty line' approach, which measures the economic 'means' through which households and individuals meet their basic needs;
- (ii) the 'capabilities' approach, whereby 'means' other than earnings or transfer payments and the like, such as endowments and entitlements are brought into the equation, along with 'ends' ('functioning achievements'); and
- (iii) 'participatory poverty assessments' which explore the causes and outcomes of poverty in more context-specific ways.

### **2.1 (i) The poverty line approach: constraints regarding gender**

Grounded in quantitatively-derived (or 'money metric') measures of income, consumption and/or expenditure, national (and international) 'poverty lines' are drawn at the point which divides 'poor' from 'non-poor' households on the basis of whether their income is sufficient to satisfy an officially-determined minimum level of survival. Two common indicators emanating from these calculations are first, the 'headcount index' which measures the percentage of the population living below the poverty line, and second, the 'poverty gap' which measures the average depth to which people are below the poverty line (see Bradshaw and Linneker, 2003:7; McIlwaine, 2002).

The poverty line approach assumes that well-being can be equated with capacity to meet essential physical survival needs (usually food), and the 'ability —shown by income— to "choose" between different "bundles" of commodities' (Kabeer, 2003:79; see also May, 2001:24-5). While this continues to be important, the poverty line approach can only go so far in that it discounts factors such as the impacts on personal or private well-being of public goods and services such as health and education (UNFPA, 2002). It also ignores non-monetary resources through which people satisfy their survival needs (for example, the 'social capital' generated among networks of kin, friends or neighbours), as well as the fact that 'the well-being of human beings, and what matters to them, does not only depend on their purchasing power, but on other less tangible aspects, such as dignity and self-respect' (Kabeer, 2003:80). As echoed by May (2001:24), in many countries, poverty definitions at the grassroots extend well beyond considerations of physical survival to incorporate notions of 'exclusion, powerlessness and stigma', and to construe poverty as being 'relational rather than absolute' (ibid.). While all these omissions compromise gender-sensitivity, the most significant problem is that poverty lines have remained oriented to the household as a unit of analysis, meaning that the differential poverty burdens of women and men are ignored (Kabeer, 2003:81). As noted by Razavi (1999: 412), despite long-standing feminist concerns about intra-household resource distribution, it remains '... rare to find standard surveys, such as those carried out in the context of the PAs (poverty assessments), embarking on a quantitative exploration of intra-household poverty'.

### **2.1 (ii) The capabilities approach: constraints regarding gender**

Whereas the poverty line approach focuses mainly on 'means', the 'capabilities' approach to poverty (see earlier) also focuses on 'ends', as well as blurring the distinction between 'means' and 'ends' (Kabeer, 2003:84). As far as 'means' are concerned, the capabilities approach not only takes into account income, but embraces services which can significantly assist people to meet their survival needs (drinking water, sanitation, public health and so on). In respect of 'ends', these include a comprehensive range of factors deemed vital for human life such as shelter, health and clothing, and which, in turn, can assist people in achieving other 'functionings' (Kabeer, 2003:83-4; refer also to Note 5). By concentrating on the individual, capabilities can also be interpreted and measured in gender-disaggregated ways, as evidenced by the GDI and GEM (see earlier). As summarised by Kabeer (2003:95), the many useful contributions to gender and poverty offered by the capabilities approach, include: first, assistance in monitoring differences in basic

achievements across space and time; second, drawing attention to regional differences in gender inequality (on the basis of kinship and gender relations) that do not necessarily dovetail with regional patterns of income or poverty, and third, revealing aspects of gender inequality that persist regardless of levels of economic growth. By the same token, although the capabilities approach goes well beyond poverty lines in revealing gender dimensions of poverty, much information relevant to gender inequality, such as time use and work intensity (see Corner, 2002; Floro, 1995), is not captured in mainstream indices such as the GDI and GEM. Besides this, the reach of these indices continues to be compromised on account of inadequate data (see later).

### **2.1 (iii) Participatory poverty assessments: constraints regarding gender**

Participatory poverty assessments (PPAs) have made a number of important contributions to gendered poverty analysis, notably by highlighting factors such as women's greater burden of 'time poverty', their vulnerability to domestic violence, and unequal decision-making (Kabeer, 2003:99). PPAs have also revealed that perceptions of poverty at the household level are wont to differ by gender insofar as men usually define poverty as a lack of assets whereas women equate poverty with shortfalls in consumption, coupled with inability to 'provide for the family' (May, 2001:27). In the 'Voices of the Poor' study carried out by the World Bank for the *2000/2001 World Development Report* (see earlier), it transpired that men frequently defined poverty in terms of lack of respect and self-esteem, yet 'no women seem to have regarded themselves entitled to demand respect' (Johnsson-Latham, 2002:4).

Not all participatory assessments make reference to gender issues, however. This is partly because PPA methodology is subject to the relative 'gender-blindness' or 'gender-awareness' of its facilitators (Kabeer, 2003:101). While, in principle, for example, PPAs promise greater degrees of empowerment and subjectivity, the question of who is selected, encouraged, and/or available to participate at the grassroots can affect the picture. Indeed, even if women as well as men are involved in consultations, the internalisation of gendered norms means that both parties may conceal or downplay gender bias (ibid.:102). Given that PPA data are often left 'raw' rather than 'interpreted', this can significantly obscure gender differences and their meanings (Razavi, 1999:422; also Baulch, 1996; McIlwaine, 2002; Whitehead and Lockwood, 1999). Moreover, where data are aggregated (in the interests of presentational simplicity) and/or interpreted (in the interests of policy formulation, for example), losses in gender-relevant information can occur through the biases of researchers and analysts (Kabeer, 2003:102; see also Johnsson-Latham, 2002). This situation would undoubtedly be less likely if there were more dedicated efforts to 'triangulate' participatory findings with other, 'objective', criteria (see Razavi, 1999:422), or existing standard qualitative gender analyses (in the form of case studies and so on) which focus on gendered relations and processes as well as outcomes (see Whitehead and Lockwood, 1999:539; also later).

More generally, shortcomings of PPAs include the difficulty of verifying results and comparing them across national and international contexts, the fact that the process of participation itself is so dialogic and power-laden that the knowledges produced may be more a function of the exercise itself than a window onto people's opinions on, or responses to, privation, that informants' participation itself, and what they say, may be shaped by financial incentives, and that it is difficult (and costly) to recruit skilled communicators up to the task of genuine participatory assessment rather than the 'straightforward' application of a questionnaire (see, for example, Cook [ed.], 2002). Adding up these factors, it is no surprise that PPAs are often regarded as an adjunct rather than a substitute for more conventional methods (UNFPA, 2002).



Indeed, despite growing lip-service to the importance of ‘social deprivation’ (rather than ‘physical deprivation’), in poverty evaluation, which, via more holistic, participatory methods nominally takes into account the ‘voices of the poor’ and considers (gendered) subjectivities, power relations and so on, the development ‘mainstream’ seems to find it easier to fall back on traditional (quantitative) formulae, especially when it comes to major, internationally comparative estimates of poverty levels and trends (see, as an example, World Bank, 2000, and for critiques, Razavi, 1999; Whitehead and Lockwood, 1999). There are, of course, several problems with money-metric methods, not least that people are often unwilling to divulge information about their incomes or expenditure, that many aspects of well-being are not secured through market transactions, and that in failing to concentrate on outcomes, consumption based approaches say little in respect of trends in quality of life or capabilities (May, 2001:36). None the less, such methods often continue to be favoured by national as well as international bodies on grounds that: ‘Income-based measures of poverty are objective, highly amenable to quantitative analysis, and accurately describe income poverty, provided household surveys are carefully administered’ (UNFPA, 2002).

## **2.2 Deficiencies in data on gender and poverty**

Leading on from this, and recognising that broader conceptualisations of poverty have not readily translated into the widespread development or application of tools which are sensitive to the gendered complexities of poverty, one of the biggest outstanding obstacles is the difficulty of incorporating qualitative and subjective criteria within macro-level accounting. While gender indicators and poverty indicators are not one and the same, there are various statistical measures of gender inequality which pertain to poverty and, virtually without exception, these continue to rely on quantitative variables which do not go very far in enriching understanding of male-female inequalities. Gender differences in educational enrolment, as in the GDI for example, may give some notion of differential capabilities between women and men, but say nothing about quality of education, gender bias in educational choices and so on. The prospects that existing indices might be extended to include material of this nature, let alone more abstract phenomena such as power, independence or rights, or contentious issues such as rape, sexuality and domestic violence, are decidedly remote. This is especially so given that for some countries it is difficult to obtain data even for basic indicators of gender. Coverage of the GDI, for example, is still limited to 148 out of 173 countries of the world for which the HDI is calculated, and the GEM to merely 66 (UNDP, 2002).

Another set of problems pertaining to gender indicators in general is that the accuracy of data is in doubt. Most indicator systems are developed from national censuses, which, in themselves, are rarely a reliable source of information, prone, as they are, to sporadic collection, poor enumeration, and imprecise definition of key terms, not to mention gender bias (Beck, 1999). For example, men may predominate among enumerators, and/or enumerators may not have had gender training appropriate to the task of eliciting information that accurately captures, records and/or represents gender differences (see Corner, 2003).

Choice of indicators is also contentious given that this tends to be determined by a handful of international experts, when, instead, more meaningful selection might be sought through consultation with a broad cross-section of different stakeholders in specific contexts in the South—national governments NGOs, and/or women and men themselves. For example, female representation in parliament (as in the GEM), may in some respects be important insofar as it may indicate change over time, or a challenge to male bias in public political life, and/or growing capacity and will at a national level to address issues such as gender discrimination in employment, reproductive health or domestic violence. By the same token, this measure leaves out the bulk of

women in many societies, whose daily lives may remain relatively unaffected by formal politics, and whose own political participation is more likely to be restricted to local level, grassroots movements.

Leading on from this, while standardised data for different nations and regions are arguably helpful in some ways, the meanings of the criteria selected, especially when examined in isolation, may not be easily transported across different cultural, social and economic contexts. For example, Dijkstra and Hanmer (2000) point out that higher female income shares are commonly equated with more gender-sensitive development (and, by implication, less likelihood of female poverty), yet if this also means that women end up with heavier ‘double’ and/or ‘triple burdens’ (whereby their income-generating work is merely layered on to other [unpaid] responsibilities in their homes and communities), then the value is questionable. Women can rarely count on much alleviation of their reproductive labour of housework and childcare to offset additional responsibilities in the paid economy. As such increased income may come at the cost of depletion of other valued resources such as time, health and general well-being. Moreover, accepting that there may be many positive impacts of increased incidence of earning among women, such as more autonomy and personal power, not to mention reduced poverty, this does not necessarily apply where women’s wages remain low, or they are pressurised into surrendering their earnings to fathers, husbands, or other relatives. In turn, the market value of women’s work may not be particularly important to women themselves compared with other aspects of their employment which, in given social and cultural contexts, may be strongly valued at a personal level, such as modesty, respect, acceptability to husbands and kin, job fulfillment and/or the ability to reconcile paid work with childcare. As Bradshaw and Linneker (2001:206) point out in relation to employment in ‘*maquilas*’ (export processing plants), for example, becoming richer materially may be accompanied by ‘frustrating’ or ‘demeaning’ situations for women. Inference and assumption become critical here since, as pointed out by Beck (1999), gender indicators do not effectively inform the analyst about why gender relations have been shaped in a particular way, let alone disclose anything of their social meanings. This tends to raise questions rather than provide answers, and can also lead to policies which address the symptoms rather than the causes or underlying determinants of specific gender disparities. This is not to deny, however, the value of indicators for comparative analysis of different countries, nor that the treatment of symptoms may be better than nothing.

A final proviso concerning gender indicators in general, whether poverty-related or not, is that they usually say nothing about differentiation between women (or men) on account of their stage in the lifecourse, household circumstances, marital and fertility status and so on. The fact is that particular groups of women—for example, elderly women, adolescent girls, indigenous or ethnic minority women— may be vastly worse off and/or more vulnerable than other groups of women. As with all aggregate measures, however, such differences are masked.

### **2.3 The burden of stereotypes in advocacy and planning for gender-responsive poverty alleviation**

Blindness to, or insufficient appreciation of, internal differentiation among women is pertinent to the situation whereby gendered poverty analysis has produced a range of rather monolithic stereotypes which do not hold for all women, nor all contexts. The most obvious, and increasingly widely critiqued, of these stereotypes relates first to the generic concept of the ‘feminisation of poverty’, and second, and more significantly, to its links with the progressive ‘feminisation of household headship’ (see Chant, 2003). In different ways, these constructions have been shaped by the imperative of getting ‘gender on the agenda’ for development resources. Yet

while largely successful in this regard, sensitivity to the diversity of gendered experiences of poverty has often been sacrificed in the process.

### **2.3 (i) The ‘feminisation of poverty’**

The idea that women bear a disproportionate and growing burden of poverty at a global scale, often encapsulated in the concept of a ‘feminisation of poverty’, has become a virtual orthodoxy in recent decades. The dearth of reliable and/or consistent data on poverty, let alone its gender dimensions, should undoubtedly preclude inferences of any quantitative precision (Marcoux, 1997; Moghadam, 1997:3). Yet this has not dissuaded a large segment of the development community, not least many international agencies, from asserting that 60-70% of the world’s poor are female, and that tendencies to greater poverty among women are deepening (see for example, UNDP, 1995:4; UN, 1996:6; UNIFEM, 1995:4 cited in Marcoux, 1997; also ADB, 2000:16).

The factors responsible for the ‘feminisation of poverty’ have been linked variously with gender disparities in rights, entitlements and capabilities, the gender-differentiated impacts of neo-liberal restructuring, the informalisation and feminisation of labour, the erosion of kin-based support networks through migration and conflict, and last, but not least (as previously indicated), the mounting incidence of female household headship (BRIDGE, 2001; Budowski et al., 2002; Chant, 1997a, 2001; Davids and van Driel, 2001; Marcoux, 1997; Moghadam, 1997; see also below). Although it seems rather paradoxical that despite three decades of rhetoric and intervention to reduce gender inequality, and some evidence of diminishing gender gaps in education, economic activity and so on, women should not only be the majority of the world’s poor but a purportedly rising percentage, there is no doubt that the feminisation of poverty thesis has been a powerful tool of gender advocacy. It has served to push gender to the centre stage of international fora on poverty and social development, with women’s economic empowerment —through welfare and productivity investments— now widely seen as crucial not only in achieving gender equality but eliminating poverty (see DFID, 2000; Razavi, 1999:418; UNDAW, 2000; UNDP, 2001). The political expediency of emphasising women’s poverty is in abundant evidence when considering the proliferation of projects, programmes and policies aimed at increasing women’s literacy and education, facilitating their access to micro-credit, enhancing their vocational skills, and/or providing economic or infrastructural support to female-headed households (see Chant, 1999; Grosh, 1994; Kabeer, 1997; Lewis, 1993; Mayoux, 2002; Pankhurst, 2002; UNDAW, 2000:3 & 9; Yates, 1997). Similarly, gender is now regarded as a ‘cross-cutting’ issue in mainstream economic interventions such as Poverty Reduction Strategy Policies (PRSPs), with the notion that proposals should not only be gender-aware, but that women should be a vital part of the consultation process (see Bradshaw and Linneker, 2003). This said, in various quarters, there is substantial apprehension concerning the utility of the ‘feminisation of poverty’ thesis in describing trends in women’s poverty across developing countries, how appropriately it defines and accounts for poverty, and how effectively it contributes to framing responses to female disadvantage. In particular, concerns have been expressed about the way that this formulaic nomenclature glosses over generational change and other differences, how it links poverty with women (rather than gender relations), how it prioritises income over other aspects of privation, and how it leads to a focus on the ‘victims’ of unequal development as the catalyst for transformation.

While not denying that women face an above-average risk of poverty, for example, the term ‘feminisation’ intimates that this phenomenon is ongoing, if not increasing, such that that gaps between female and male poverty-generating processes are widening over time. The fact is, however, that in many countries of the world, there are signs that disparities between women’s and men’s incomes, capabilities and entitlements are lessening rather than intensifying among younger age groups, and that there is a need to pinpoint more precisely which groups of women are prone to

greater vulnerability (see Chant and McIlwaine, 1998). The fact that the only group of women identified as vulnerable to greater risks of poverty under the auspices of the ‘feminisation of poverty’ thesis are female heads of household, is arguably a detraction from other issues —age, ethnicity and so on— that may condemn certain groups of women to equivalent, if not higher levels of privation (see later).

Another downside of the feminisation of poverty thesis is that it tends to place gender in the ‘poverty trap’ (Jackson, 1996). In other words, gender inequality becomes reduced to a function of poverty even though gender and poverty are distinct, albeit overlapping, forms of disadvantage (ibid.; see also Jackson, 1998; Jackson and Palmer-Jones, 1999; Kabeer, 2003). In turn, as pointed out by Bradshaw and Linneker in the context of PRSPs:

‘... the focus on poverty itself may be seen to be problematic in gender terms, given that if women’s relative poverty in its diversity is to be challenged, its root causes need to be addressed —the structural inequalities that underpin it’.

Leading out of this, repeated emphasis on the links between women and poverty in analysis and advocacy, and the idea that investing in women is one of the most efficient routes to ensuring all-round development benefits, seems to have translated into a generalised bid to alleviate poverty primarily, or even exclusively, through women (see Jackson, 1996:490; Kabeer, 1997:2; Molyneux, 2001:184; Pankhurst, 2002; Razavi, 1999:419). The World Bank, for example, talks at one level about ‘empowering’ women while at the same time emphasising the ‘pay-offs’ or ‘returns’ from ‘investing in women’ (see World Bank, 1994). One particularly pertinent example, is the Bank’s argument that education for girls is the single most effective strategy for tackling poverty since it not only enhances their own earning capacity, but exerts positive effects on child morbidity and mortality, nutrition, and the schooling of subsequent generations (ibid.; see also World Bank, 2000, 2002). In the context of PRSPs, gender-sensitive development is nominally seen as integral not only to equity objectives, but also to economic growth (see Bradshaw and Linneker, 2003:10).<sup>12</sup> While not disputing these claims, nor that arguments which emphasise the importance of reducing gender inequalities in the wider interests of national and international development, can be extremely strategic for allocating resources to women, it is important to acknowledge the need to maintain boundaries between empowerment as a route to development efficiency, and empowerment as a goal for women per se. As identified by Jackson (1996:490), instrumentalist approaches to poverty alleviation can lead to women simply being used as a means to other ends (see also Razavi, 1999:419; Molyneux, 2001:184). This is echoed by numerous critiques of the ways in which the targeting of women within welfare and efficiency projects results not in development ‘working for women’ so much as ‘women working for development’ (see Blumberg, 1995:10; Elson, 1989,1991; Kabeer, 1994:8; Moser, 1993:69-73). As summed up by Bradshaw and Linneker (2001:207):

‘The inclusion of a gender perspective within the poverty discourse is an ongoing process. In recent years while there has been an increased interest in focusing on the role of women in the reduction of poverty, in general gender has been included as a variant on the poverty problem. That is, women have been added in to existing policies most usually for their capacity as efficient service providers rather than as people with rights, agendas and needs’.

<sup>12</sup> In actuality there may be a considerable gap between principle and practice, however. Bradshaw and Linneker (2003:11), for example, claim that women and gender are rather more secondary than central to the formulation of PRSPs than the rhetoric proclaims. This is deduced on the basis that there is actually no minimum gender requirement for PRSPs, no clear guidance from the IFIs (International Financial Institutions) on how and who among women should be included in the policy development process, and that there are instances where non-gendered PRSPs have been approved (ibid.; see also Bradshaw et al., 2002:13).

Although so-called ‘gender-responsive’ poverty alleviation initiatives are often couched in the language of ‘women’s empowerment’, therefore, efficiency often prevails over equity, with the underlying impetus being that investing in women makes ‘good economic sense’. As reflected in an indicative statement by Finne (2001:9):

‘Economic progression and improvements in the quality of life for all people is more rapidly achieved where women’s status is higher. This is not simply a focus on a single individual, but because of women’s communal role, positive effects will be seen in the family, home, environment, children, elderly and whole communities and nations’.

Aside from the onus placed on women not only to cure their own poverty, but to reduce poverty more generally, the fact that there is little room in the feminisation of poverty thesis for men and gender relations means we know little about which other groups face growing threats of poverty or what the repercussions of these might be in terms of inter-group dynamics. For example, evidence suggests that growing pockets of social, educational and economic vulnerability among men can manifest itself in violence in the home and in the community, in drug or alcohol abuse and other forms of disaffected behaviour (see Chant and Gutmann, 2000; Moser and McIlwaine, 2000a,b; UNESCO,1997:6; also Note 11). These phenomena can have immense impacts on women, who, regardless of their own stock of formal capabilities, may find themselves sinking deeper into poverty through their ties with men as partners, daughters, mothers, and so on. Patriarchal structures both within and outside the home assist in explaining, for example, how micro-credit programmes for women often lead to their accumulating greater debt because their husbands commandeer and/or fritter away the loans. Similarly, the overlying of male-female relations in the home with women’s increasing subjection to casualisation, and falling wages and profits in the paid economy (see earlier, and Note 6), continues to render the relationship between employment and power a ‘vexed one’ (Moore, 1988:111; see also McClenaghan, 1997; Tiano, 2001). In short, the preoccupation with women and income in the feminisation of poverty thesis is dangerous for two main reasons: one, because, analytically, it occludes the social dimensions of gender and of poverty, and two, because in policy terms, it translates into single-issue, single group interventions which have little power to destabilise deeply-embedded structures of gender inequality in the home, the labour market, and other institutions.

Aside from the general ways in which the feminisation of poverty thesis tends to foreclose the research questions and policy options already described, as indicated previously, the heavy emphasis in the thesis on the notion that female-headed households are the ‘poorest of the poor’ is arguably more problematic still. As outlined by Moore (1994:61):

‘The straightforward assumption that poverty is always associated with female-headed households is dangerous, because it leaves the causes and nature of poverty unexamined and because it rests on the prior implication that children will be consistently worse-off in such households because they represent incomplete families’.

### **2.3 (ii) Female-headed households as the ‘poorest of the poor’**

The fact that female-headed households have been a ‘visible and readily identifiable group in income statistics’ (Kabeer, 1996:14), has, like the ‘feminisation of poverty’ thesis more generally, provided fuel for a range of political and economic agendas. In one respect, for example, it has served neoliberal enthusiasm for the efficiency-driven targetting of poverty reduction measures to ‘exceptionally’ disaffected parties. At the other end of the spectrum, highlighting the disadvantage of female-headed households has also served GAD interests insofar as it has provided a tactical peg

on which to hang justification for allocating resources to women (see Baden and Goetz, 1998:23; Chant, 2001; Jackson, 1998).

Yet, over and above the fact that, as discussed earlier, there is little substantive macro- or micro-level evidence to suggest that women-headed households are the ‘poorest of the poor’, a number of undesirable (if unintended) consequences result from the links between female household headship and poverty and their homogenising tendencies (see Box 6). One of the most important is that it suggests that poverty is confined to female heads alone, which thereby overlooks the situation of the bulk of women in general (Feijoó, 1999:156; Jackson, 1996, 1997:152; Kabeer, 1996; May, 2001:50). As noted by Davids and van Driel (2001:162):

‘What is implied is that female-headed households are poorer than male-headed households. The question that is not asked, however, is whether women are better-off in male-headed households. By making male-headed households the norm, important contradictions vanish within these households, and so too does the possibly unbalanced economical (sic) and social position of women compared to men’.

Lack of attention to intra-household inequalities in resource allocation, as we have seen, can also draw a veil over the ‘secondary poverty’ often experienced by women in male-headed units (see Bradshaw, 1996; Chant, 1997a; Fukuda-Parr, 1999; González de la Rocha and Grinspun, 2001; Moghadam, 1997; Varley, 1996).

Another major outcome of emphasis on female-headed households as the ‘poorest of the poor’ is that it conveys an impression that poverty owes more to their household characteristics (including the marital and/or civil status of their heads), than to the macro social and economic contexts in which they are situated. This not only scapegoats women but diverts attention from wider structures of gender and socio-economic inequality (Moore, 1996: 74). It also implies that motherhood is only viable and/or acceptable in the context of marriage or under the aegis of male household headship (see Chant, 1997b; Collins, 1991:159; Hewitt and Leach, 1993).

Related to this, persistent portrayals of the economic disadvantage of female-headed units, which, implicitly or otherwise, attribute this to their household circumstances, not only misrepresent and devalue the enormous efforts made by female heads to overcome the problems they face on account of their gender, but also obliterate the meanings of female headship for women. As asserted by Davids and van Driel (2001:166):

‘Female-headed households appear as an objective category of households in which the subject position of the female head vanishes completely as does the socio-cultural and psychological meaning that their status has for them personally’.

Other outcomes include fuel for pathological discourses of female-headed households as deviant and/or ‘inferior’ to a male-headed ‘norm’. This, in turn, can perpetuate the idea that male-headed households are the sole embodiment of ‘in-tact’ and essentially unproblematic family arrangements (Feijoó, 1999:156). Moreover, uncompromisingly negative images of female heads can condemn them to greater privation, for example, by limiting their social networks which, in many parts of the world, act as sources of job information, as arenas for the exchange of labour and finance, and as contexts for securing the prospective marriages of offspring (see for example, Bruce and Lloyd, 1992; Davids and van Driel, 2001:64; Lewis, 1993:34-5; Monk, 1993:10; Winchester, 1990:82). Another contentious outcome of ‘poorest of the poor’ stereotyping is that it can bolster neo-conservative agendas for strengthening the ‘traditional’ family’. During an era in which advocacy for children’s rights is at an all time high, emphasising the ‘inter-generational

transmission of disadvantage' ascribed to female headship can all too easily be hi-jacked by anti-feminist interests (Chant, 2003:14).

Last but not least, the tendency for the static and universalising assumptions of the feminisation of poverty thesis to produce policy interventions which either target women in isolation or focus mainly on those who head their own households can neglect vital relational aspects of gender which are likely to play a large part in accounting for gender bias within and beyond the home (see Buvinic and Gupta, 1997; Jackson, 1997; May, 2001; Moore, 1996). In other words, interventions aimed at men, whether as partners/spouses, employers, officials engaged in the disbursement of public resources and so on, remain beyond the remit of most gender interventions. This undoubtedly reflects to some degree reluctance on the part of policymakers to engage with gender, as opposed to women, when it comes to alleviating poverty. In respect of directing resources to female-headed households, for example, appeal lies in the fact that they are 'a "target group" which is less politicised, for development interventions, than intrahousehold "interference"' (Jackson, 1997:152). Another distinct attraction is that such strategies are cheaper, with targetting acting as a major neoliberal tool to effect reduction in public expenditure on universal social programmes in favour of 'streamlined' (and more cost-effective) schemes for poverty alleviation (see Budowski and Guzmán, 1998; Chant, 2002).

In summarising the implications of the above section for poverty analysis, my main argument is that the rich and complex insights about gendered poverty brought to bear by over three decades of feminist scholarship are often 'lost in translation' first, in the course of advocacy, and second, in policy design and implementation. In respect of advocacy, 'bite-size' truisms about women's poverty have distinct appeal in securing resources. 'Hard' or at least 'visible' or 'digestible' evidence of women's privation, provides readily-justifiable slogans for efforts to (re)direct expenditure to women. Yet instead of being (re)problematized or elaborated when it comes to policy development, prevailing stereotypes are often adopted in their existing form and/or simplified further. Whether this is driven by inability to handle nuances, and/or by the desire to work with 'clear' targets or formulaic prescriptions, to achieve rapid and visible results, or to minimise cost, the complexities concerning gendered causes, experiences and consequences of poverty tend to 'slip through the cracks' en route from research through advocacy, to policy. In the process, orthodoxies about women and poverty are crystallised that can become 'Trojan horses' in the wrong hands. This may take the form of using women's 'empowerment' to serve poverty reduction agendas, or to 'rationalise' public expenditure on universal social programmes through targeting female-headed households. Given that pronouncements by international agencies about gender and poverty often gather cumulative legitimacy, and can exert a major influence on research agendas, it is important that concerns to eliminate poverty and gender inequality alike, do not exclude the vitally significant nuances that offer possibilities for frameworks for poverty analysis to progress.

## **Chapter 3: Future directions for research and policy**

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While it has not been possible here to cover all the contributions made by gender research to the analysis of poverty, it is clear that significant advances towards the ‘engendering’ of poverty analysis have been made since the 1970s. These developments have, in turn, helped to illuminate gendered dimensions of poverty. As summed-up by Razavi (1999:417):

‘From a gender perspective, broader concepts of poverty are more useful than a focus purely on household income levels because they allow a better grasp of the multidimensional aspects of gender disadvantage, such as lack of power to control important decisions that affect one’s life’.

### **3.1 Looking towards advances in conceptual and methodological frameworks for poverty analysis**

The idea that frameworks for poverty analysis should become broader still is highly desirable, although this does not necessarily mean that we should be seeking to work with one approach alone, nor that any individual approach should be rejected out of hand. Although poverty line approaches have been shown to fall short of representing key dimensions of gendered poverty, for example, it remains vital to



know about income and consumption, and to have quantitative information on these issues, not least because this provides an indication of the depth and incidence of material privation, of wages and earnings, and of relative costs of living. This said, there is clearly scope to improve poverty line approaches in ways that increase their sensitivity to gender. One step in this direction, for instance, would be for poverty lines to work with data pertaining to per capita and or adult equivalent measures as well as household incomes. Another welcome refinement would be to include a broader remit of quantifiable measures of privation, disaggregated, where possible, by sex. This could include a range of women's and men's capabilities, assets and entitlements amenable to quantification (education, health status, land, property, access to public goods and services and so on), along with factors such as time which is evidently one resource which is especially scarce among low-income women in the South (see Corner, 2002). Indeed, although the generation of time use data of a form and quality suitable for policy purposes is a 'complex and necessarily expensive task', it is essential in challenging the persistent invisibility of much of women's contribution to developing country economies (ibid.:2-3). Highlighting the effort expended in unpaid tasks such as childcare, looking after the elderly and infirm, voluntary community and social work and so on, can, in turn, raise women's profile of needs and interests in policies and programmes (ibid.).<sup>13</sup>

Aside from more comprehensive and better quality cross-sectional and time series data, attempts should also be made to break down sex-disaggregated statistics by age, if not by other factors such as civil and fertility status. This would be of particular importance in helping to determine whether there are major generational differences among women (and men) and how and for whom poverty is becoming more pronounced over time. This, in turn, would also help to inform policy interventions. Indeed, picking up a point made earlier in the paper, where analyses of gendered poverty continue to focus on women only, or on women primarily, and as an undifferentiated group (except for their status as household heads), then it is unlikely that we will gain a clear picture or understanding of how the poverty gap between women and men seems to be widening.

For the advances described above, it will also be necessary to make data collection itself more gender-sensitive. Initiatives in this direction have already been undertaken in a number of developing countries. One strategy, used in India in connection with the 2001 census, for example, has been the provision of comprehensive gender training for enumerators and key officials involved in national accounting systems (see Corner, 2003:7). Another strategy has been to set minimum targets for female enumerators and supervisors. Levels of 20% and 10% respectively were established for the 2001 Census of Nepal (representing a major rise on previous figures) following the widespread observation that the use of women as enumerators tends to lead to significant increases in the enumeration of women's labour force participation. Another strategy has been to revise terms and definitions of key issues within censuses and other surveys which relate to gender, such as 'work' (ibid.:8; see also Note 8).

While not all data is readily amenable to quantification, this should not exclude qualitative poverty analysis from the picture. For example, aggregate summaries from participatory poverty assessments could be much more explicit about gender-specific dimensions of poverty which appear in the 'raw' data (see Johnsson-Latham, 2002 in relation to the World Bank's 'Voices of the

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<sup>13</sup> Even use of the simple '24 hour day model' in which participants are asked to describe the use of time by women and men in their own or other households on a typical day, has been critical in underlining the fact that 'women are not "just sitting at home all day" waiting for a project or government programme to come along and "involve them in development"' (Corner, 2002:7). It has also helped to move analysis away from a WID to a GAD approach insofar as it permits systematic comparisons between women's and men's lives and activities. Some of the now widely-accepted facts which the 24 hour day model has assisted in establishing are: 1) that women and men use time differently, 2) that women spend more time in work overall than men, but shorter hours in paid work, 3) that women have less 'discretionary' time, and 4) that women typically engage in multiple activities (childcare, housework, remunerative work, minding animals and so on), simultaneously (ibid.).

Poor' study; also Box 7). Considerably more could also be done in terms of research which brings together not only the findings of PPAs and other types of poverty analysis (poverty line, capabilities), but which 'triangulates' these with in-depth studies of gender in the contexts concerned. For example, it is clear that different groups of women experience poverty differently in different spaces (the home, the labour market, public welfare and so on), and the task of 'poverty syntheses' could help to identify who these women are, and in which spaces they are at greatest risk of privation.<sup>14</sup>

A major step forward could also be made in terms of encouraging more widespread participation by different stakeholders in identifying the key dimensions of gendered poverty which are significant to the poor themselves. While consensus across countries is unlikely to be easy, a gender-sensitive Human Poverty Index which comprises a number of different measures culled from broad-based consultations, is not out of the question.

### 3.2 Looking towards new directions in policy

Thinking about interventions to reduce women's poverty to date, these have already responded to new directions in poverty analysis, particularly insofar as they have taken on board the need to invest in women's capabilities, through education, health, vocational training and so on, and/or to enhance their access to assets such as employment, credit, infrastructure and housing. While such interventions potentially go some way to narrowing gender gaps in well-being, and have arguably moved into a new gear given increasing experimentation with 'gender budgets' at national and local levels (see Borges Sugiyama, 2002; BRIDGE, 2003; Budlender, 2000; Budlender and Hewitt [eds], 2002; Kabeer, 2003:220-5),<sup>15</sup> it is worth noting that with the possible exception of domestic violence, initiatives relating to the 'private' sphere of home and family are often left out of the frame (see Chant with Craske, 2003: Chapter 7). This relative neglect of 'family matters' is somewhat surprising given the common argument advanced by international institutions that it is families who actually benefit from reductions in women's poverty! In addition, unless factors such as 'secondary poverty' within households are recognised by policymakers then efforts to reduce poverty or enhance well-being through stimulating income-generating activities among women, increasing their access to credit, and so on, may well come to nothing (Bradshaw, 2002:31; Kabeer, 1999).

With this in mind, it is important not only to regard women as individuals (even if reducing their poverty and enhancing their personal autonomy and empowerment is an ultimate goal), but to go back to what, in one sense, might be construed as a less fashionable premise, namely that women are also embedded in family and community structures which play a large role in determining their behaviour and possibilities. Recalling that poverty is not just about incomes, but about power, self-esteem, social legitimacy and so on, it is possible to think about three 'family-oriented' strategies which might be useful in complementing existing approaches to alleviating poverty among women. These are, as discussed below, public support for parenting, equalisation of responsibilities and power among parents, and bolstering the socio-economic status and rights of female heads of household.

<sup>14</sup> As Bradshaw (2002:12) has argued, women's poverty is not only multidimensional but is also 'multisectoral', namely 'women's poverty is experienced in different ways, at different times and in different "spaces"'. Recognising that any single category of household is marked by its own heterogeneities, one of the main differences between women in female- and male-headed units is that the former tend to face problems of a limited asset base (labour, incomes, property and so on), while the latter's main difficulty may be restricted access to and control over household assets (*ibid.*; see also Linneker, 2003:4). Accordingly, gender inequality needs to be addressed within as well as beyond the boundaries of household units (Chant, 2001; also Kabeer, 2003:167).

<sup>15</sup> Kabeer (2003:220) points out that Gender-responsive Budget Analysis (GBA) can potentially promote greater transparency and accountability in policy processes, as well as help to 'match policy intent with resource allocation'.

### **3.2 (i) Public support for parenting**

One of the problems with normative assumptions about the dominance of the ‘male-headed family’ is that, coupled with dominance of men in public institutions, family-oriented and other sectoral policies for the most part reflect male bias (see Bibars, 2001: 159; CEPAL, 2001:13). With regard to parenting, for example, it is implicitly expected that the daily care of infants and children should fall to women, and that the burden of this care should be borne privately. The fact is, however, that macro-economic change has required more and more women to take on responsibilities for income-generating activity, such that the only way these multiple obligations can be performed is at considerable personal cost or self-exploitation. The weight of domestic and childcare burdens applies as much to female partners in male-headed households as it does to women who are household heads in their own right, with one major implication being that their ‘reproduction tax’ (Palmer, 1992) impedes entry into the labour market on the same terms as men. This contributes either to lower incomes for women and their families, or to a weaker bargaining position within households. Eliminating further increases in the ‘feminisation of poverty’ would accordingly be better assured if there was greater recognition of women’s disproportionate responsibility for raising children through public-sponsored provision of childcare and family benefits (see Chant, 2002).<sup>16</sup> Pressure on employers to contribute to such initiatives would also be desirable, with the added value that this could be tactically negotiated on instrumentalist grounds. As Elson (1999:612) has argued, employers tend to conceive of the unpaid caring of their employees as ‘costs’ rather than as ‘benefits’, when the latter can accrue from the fact that workers bring skills to the workplace that derive from their roles as parents and as household managers. In short:

‘... the reproductive economy produces benefits for the productive economy which are externalities, not reflected in market prices or wages’ (ibid.; see also Folbre, 1994).

To push such agendas, it is clearly vital to get more women consulted and on board in policymaking processes, recognising that broad-based participation is not easy and may even lead to fragmentation among women. Yet as argued by Finne (2001:7):

‘If women comprise 70% of impoverished people, how can they be left ignored in decisions that further contribute and create this extreme situation? A beginning in alleviation (sic) rests on the power of women, representation and decision-making’.

### **3.2 (ii) Equalising gender divisions of power and responsibility in the domestic realm**

In addition to public support for parenting, there are strong grounds for mobilising resources closer to home, and more specifically to promote greater involvement on the part of men in childcare, contact with children, and financial responsibility.

In respect of income poverty, for example, this is often unnecessarily exacerbated in female-headed households through lack of child maintenance payments from absent fathers which are often demanded by law, but seldom upheld in practice. Were states to monitor and enforce men’s

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<sup>16</sup> One model used in Costa Rica has been that of ‘Community Homes’ (Hogares Comunitarios). Administered by the Social Welfare Institute (IMAS/Instituto Mixto de Ayuda Social), and concentrated primarily in low-income settlements, women running ‘community homes’ are given training in childcare and paid a small state subvention for looking after other people’s children in the neighbourhood. Individuals using this service pay what they can as a token gesture and lone mothers are technically given priority for places (see Sancho Montero, 1995).

economic obligations to children, this could go a substantial way to reducing the financial pressures faced by female-headed households.

One recent initiative of this type has occurred in Costa Rica in the form of a radical new 'Law for Responsible Paternity' ('Ley de Paternidad Responsable'), passed in 2001. Momentum for the law came, inter alia, from a steady increase in the non-registration of fathers' names on children's birth certificates, such that by 1999 nearly one in three new-born children in the country had a '*padre desconocido*' ('unknown father'). The law requires men who do not voluntarily register themselves as fathers on their children's birth certificates to undergo a compulsory DNA test at the Social Security Institute. If the result is positive, they not only have to pay alimony and child support, but are liable to contribute to the costs of the pregnancy and birth, and to cover their children's food expenses for the first twelve months of life (INAMU, 2001; Menjívar Ochoa, 2003).<sup>17 18</sup>

As for women and children in male-headed households, efforts to ensure men's compliance with economic obligations are likely to be more complex given the aforementioned reluctance among policymakers to intervene in the domestic domain (Jackson 1997:152). Given the difficulties (and possible undesirability) of public surveillance and/or policing of every aspect of inter-personal relations, one of the most tactical strategies here might be to mount public information campaigns, as has been done with some success in relation to domestic violence in Nicaragua (see Solórzano et al., 2000), and/or to encourage men (with or without their spouses) to attend workshops in which they are informed of evolving agendas of children's rights, and how these can (and should) be safeguarded by parents. Such interventions may be even more successful where attempts are made to promote male participation in a portfolio of 'family' activities that extends beyond the generation of income for their 'dependents', to emotional support and practical care (Chant, 2001, 2002; UNICEF, 1997). As highlighted by England and Folbre (2002:28): 'Less gender specialisation in the form of parental involvement could lead to improved outcomes for children, not only by improving mothers' economic position, but also by improving emotional connections between fathers and children'.<sup>19</sup> As further noted by Corner (2002:5), as long as the burden of reproductive work is borne mainly by women:

'...it is unrealistic to consider gender equality to be an achievable target since in addition to anticipated equality in the labour force, women would continue to carry the major responsibility at home. The experience of developed countries suggests that significant change in the sex distribution of unpaid housework and childcare requires it to be seen explicitly as a policy issue and as something that must be addressed in order to implement national and international commitments on gender equality and women's human rights'.

Although the most appropriate form that gender-sensitive approaches to intra-household relations and responsibilities might take requires considerably more thought, the need to engage with men in domestic and family arenas is vital given that where social programmes oriented to women do not recognise the importance of men, then male-female hostilities may increase, and

<sup>17</sup> Although this initiative is likely to go some way to improving the economic conditions of lone mother households in future and may well encourage men to prevent births, whether it will be sufficient to substantially change long-standing patterns of paternal neglect remains another issue (Chant, 2001).

<sup>18</sup> On the basis of research in the USA, McLanahan (nd:23) points out that: 'Fathers who are required to pay child support are likely to demand more time with their children and a greater say in how they are raised. Such demands should lead to more social capital between the father and child. Similarly, greater father involvement is likely to lead to less residential mobility, retarding the loss of social capital in the community'. Potential benefits to children notwithstanding, there may well be costs for mothers in terms of their freedom to raise the child as they see fit, or to change residence (ibid.).

<sup>19</sup> Engaging men in such ventures might not be as difficult as anticipated given that some partners in male-headed units willingly comply with these responsibilities already (see Chant, 2000; Gutmann, 1996, 1999), and because in women-headed households men often perform these roles in their capacities as grandfathers, uncles, brothers and sons (see Fonseca, 1991).

potentially result in more harm than good. In Costa Rica, for example, Budowski (2003:231-2) reports some women who had received 'human training' in the 'Comprehensive Training Programme for Women Heads of Household in Poverty' coordinated by IMAS (see Note 16), and who, as a result of this, denounced domestic violence or began claiming child support payments, became violent towards the fathers of their children because of their accentuated sense of injustice. In turn, other women complained to the organisers of the training workshops that there was no point in learning about their rights as women when men were barred from attending and when matters in the home continued as normal (Chant, 2001).<sup>20</sup> Another important consideration is that directing resources to lone mothers can alienate men still further from assuming responsibilities for their children's upkeep (Chant, 2002).

At the bottom line, where there is no attention to men and to gender relations then it is unlikely that efforts to help women lift themselves out of poverty will get very far. This plugs into increasing recognition of the need and desirability of bringing men on board as practitioners and beneficiaries in GAD policy and planning (Chant and Gutmann, 2000; Cornwall, 2000; Cornwall and White, 2000).

### **3.2 (iii) Equalising the status of female- and male-headed households**

Last but not least, legislation and campaigns to promote a socially-inclusive stance to a broad spectrum of family arrangements could make major inroads in respect of equalising the status and opportunities of female- and male-headed households. There is potentially much to be gained by bringing female-headed households more squarely into the formal remit of 'family options' and treating them as a part of (rather than apart from), normative and/or legally endorsed arrangements for the rearing of children. As noted by van Driel (1994:220) in relation to Botswana, female headship has to be recognised legally and socially, since:

'As long as women have a secondary legal status, both in customary and common law, and in Tswana society at large, women who are female heads of household will be seen as the exception to the rule whereas in practice the rule seems to be the exception'.

Knowing that female headship has the full support of the state and society could also mean that women within male-headed households have more options. In turn, these options may lead to more bargaining power among women, and greater compliance with obligations to the children they raise on the part of men.

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<sup>20</sup> Partly as a response to this, plans are currently underway at IMAS to develop a project called 'Apoyémonos' ('Let's Support Each Other'). The main goal will be to provide personal and collective empowerment and capacity-building in gender consciousness, rights, self-esteem and so on (encapsulated terminologically as '*fortalecimiento personal y colectivo*'), to groups of men who are partners of women undergoing equivalent training in the current programme for women in poverty 'Creciendo Juntas' (Growing Together), and/or in the programme 'Construyendo Oportunidades' (Building Opportunities) which caters to pregnant adolescents and teenage mothers (personal communication from Erika Jiménez Hidalgo and Alison Salazar Lobo, IMAS, San José, May 2003).

## Concluding comments

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The early 21<sup>st</sup> century presents us with some extremely interesting paradoxes in respect of gender and poverty. At one level, conceptual and methodological approaches to poverty have been advanced through the insights brought to bear by three decades of dedicated feminist research on gender and disadvantage. In addition, we presently have considerably more knowledge about how gender-differentiated poverty burdens come about, and where we might most effectively address interventions. Yet these self-same decades of rhetoric and policy to redress gender inequality seem not to have made a major dent on women's position relative to men. Despite some evidence of diminishing gender gaps in education, economic activity and so on, women are apparently not only an estimated two-thirds of the world's poor, but a purportedly rising percentage. Even if we take issue with the notion that the 'feminisation of poverty' is an over-determined construct which has evolved in the interests of gender advocacy, and which reflects little of the complexity of gendered experiences of poverty, the fact remains that the social relations of gender still seem to 'predict greater vulnerability among women' (Moghadam, 1997:41; see also Bibars, 2001; Kabeer, 1996:20; Millar, 1996:113; Quisumbing et al., 1995). Leading on from this, recognising that consensus on different tenets of the feminisation of poverty thesis remains elusive, not least on account of contradictory evidence arising from studies grounded in different approaches, at different scales, and in different places (see Buvinic and Gupta, 1997), evolving debates have been productive insofar as they have drawn attention to the problems of generalising about women's poverty, and of engaging in superficial dualistic comparisons between male- and female-headed

households within, as well as across, cultures. Even if it continues to be impossible to pin down the fine detail of exactly how many women are poor, which women are poor, and how they become and/or remain poor, unpacking the ‘feminisation of poverty’, and problematising some of its conventional wisdoms (not least that women-headed households are the worst afflicted), broadens prospects for change insofar as it demands tackling gender inequalities in a number of arenas. This not only signifies interventions which strive to redress gender inequalities in different ‘spaces’, such as the labour market, legal institutions, the home and so on, but which confront different types, aspects and processes of poverty and inequality, extending beyond the material, physiological and ‘objective’, to the political, social, psychological and subjective. As summed-up by Williams and Lee-Smith (2000:1):

‘The feminisation of poverty is more than a slogan: it is a marching call that impels us to question our assumptions about poverty itself by examining how it is caused, manifested and reduced, and to do this from a gender perspective’.

The main tasks for the future will surely be not only to continue breaking down the gender blindspots in mainstream approaches to poverty, but to interrogate the often reactive monolithic stereotypes that have evolved under the umbrella of ‘gender-aware’ poverty analysis and advocacy per se. This will allow us to appreciate —and to more effectively address— the social, economic and political barriers faced by particular groups of the population, in particular places, at particular times. In this regard, an amalgam of methodologies —quantitative, qualitative and participatory— dedicated to generating more comprehensive and better quality information on gender in gender-sensitive ways, will not only be desirable, but indispensable.

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## **Appendix**

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## Box 1

## DEFINITION OF A GENDER-SENSITIVE INDICATOR

An indicator is an item of data that summarises a large amount of information in a single figure in such a way as to give an indication of change over time, and in comparison to a norm. Indicators differ from statistics in that, rather than merely presenting facts, they involve comparison to a norm in their interpretation.

A gender-sensitive indicator can be defined as an indicator that captures gender-related changes in society over time. Thus whereas a gender statistic provides factual information about the status of women, a gender-sensitive indicator provides direct evidence of the status of women, relative to some agreed normative standard or explicit reference group.

An example of a gender statistic would be:

*'60% of women in country x are literate as opposed to 30% five years ago'*

An example of a gender-sensitive indicator would be:

*'60% of women in country x are literate, as compared to 82% of men, and compared to 30% and 52% five years ago'*

The norm or reference *group* in this example is men in the same country, but in other cases might be other groups of women

**Source:** Beck (1999: 35).

**STATEMENTS ABOUT FEMALE-HEADED HOUSEHOLDS AND POVERTY**

'...the global economic downturn has pressed most heavily on women-headed households, which are everywhere in the world, the poorest of the poor'.

**Tinker (1990: 5)**

'Women-headed households are overrepresented among the poor in rural and urban, developing and industrial societies'.

**Bullock (1994:17-18)**

'One continuing concern of both the developing and advanced capitalist economies is the increasing amount of women's poverty worldwide, associated with the rise of female-headed households'.

**Acosta-Belén and Bose (1995:25)**

'...the number of female-headed households among the poor and the poorer sections of society is increasing and they, as a group —whether heterogeneous or not— are more vulnerable and face more discrimination because they are poor and also because they are man-less women on their own'.

**Bibars (2001:67)**

'Households headed by females with dependent children experience the worst afflictions of poverty Female-headed households are the poorest'

**Finne (2001:8)**

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**Source:** Chant (2003:61).

## Box 3

**FACTORS INFLUENCING THE CONSTRUCTION OF FEMALE-HEADED HOUSEHOLDS AS THE 'POOREST OF THE POOR'**

- \* Historical association of 'feminisation of poverty' concept with poor lone mothers and their children
- \* Repeated 'statements of fact' in academic and policy literature
- \* Endorsement of greater incidence and degrees of poverty among female-headed households by mainstream development institutions
- \* Priority attached to quantitative/'physiological deprivation' indicators of poverty
- \* Reliance on aggregated household (rather than per capita) figures for income, consumption and expenditure
- \* 'Visibility' of female-headed households in conventional poverty statistics
- \* Instrumental value of 'poorest of the poor' orthodoxy in securing resources for women in development/social programmes
- \* Extrapolation of women's labour market disadvantage as individuals (e.g. in occupational status, earnings etc) to female-headed households
- \* Perceived impacts of gender inequalities in respect of land, property and other material assets on female-headed households
- \* Over-emphasis (or exclusive emphasis) on economic status of household head as signifier of well-being for all household members
- \* Equation of female-headed households with 'lone mother and children' households
- \* Assumption that female heads are primary or sole 'breadwinners'
- \* Assumption that women-headed households have greater proportions of female members than male-headed units
- \* Limited state/institutional transfers to female-headed households
- \* Limited financial support to children in female-headed households from absent fathers
- \* Conjectured limitations in access to and/or use of social capital of female-headed households in respect of networks of kin, neighbours, friends
- \* Dominance of normative assumptions about the advantages of the 'natural' and/or 'traditional' (patriarchal/male-headed) family unit for material well-being
- \* Social pathology discourses of lone mother households as 'incomplete families', 'problematic families' and/or as symptomatic of 'family breakdown'
- \* Concern for children's rights and well-being

Source: Chant (2003:62).

**Box 4**

**FACTORS CHALLENGING THE CONSTRUCTION OF FEMALE-HEADED HOUSEHOLDS AS THE 'POOREST OF THE POOR'**

- \* Lack of systematic 'fit' with quantitative data pertaining to incomes, consumption, indicators of well-being among children and so on
- \* Heterogeneity of female-headed households (in respect of routes into status, composition, stage in the life course etc.)
- \* Recognition that female-headed households are not necessarily 'male absent' households
- \* Strategies adopted by female-headed households to compensate for gender bias and/or household vulnerability (e.g. household extension, increases in occupational density, optimal utilisation of labour supply [especially that of women])
- \* Recognition that households are permeable units with flows from beyond household boundaries affecting internal well-being
- \* Above-average receipt of financial support from working children within and beyond the home
- \* Rejection of unitary household models in favour of models emphasising household as a site of bargaining, 'cooperative-conflict', and intra-household inequalities along lines of gender when considering resource generation and distribution.
- \* Idea that household well-being cannot be automatically equated with economic status of heads
- \* Multidimensional/'social deprivation' conceptualisations of poverty which extend beyond incomes and consumption, emphasising, inter alia, assets, subjective experiences of privation, 'vulnerability' and poverty-generating processes
- \* Poverty relations as power relations, namely that command and control over resources may be equally, if not more, important as level of resources in determining individuals' experiences of poverty
- \* Acknowledgement that female heads of household may make 'trade-offs' between different dimensions of poverty (e.g. 'income poor' but 'power-rich').
- \* Recognition that some women may actively choose female household headship on grounds of improved material and/or other aspects of well-being, and/or resist becoming part of new male-headed arrangements following conjugal breakdown or widowhood

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**Source:** Chant (2003: 63).



**Box 5****CAPITAL ASSETS OF THE POOR****Human capital**

- vocational skills, knowledge, labour (access to/command over), health

**Social capital**

- relationships of trust, reciprocity and exchanges that facilitate cooperation, and may provide for informal safety nets among the poor (NB. there can also be 'negative' social capital in the form of violence, mistrust and so on)

**Natural capital**

- natural resource stocks e.g. trees, land, biodiversity

**Physical capital**

- basic infrastructure and producer goods such as transport, shelter, water supply and sanitation, energy, and communications

**Financial capital**

- savings (whether in cash, livestock, jewellery), and inflows of money, including earned income, pensions, remittances, and state transfers

**Source:** Rakodi (1999).

Box 6

**IMPLICATIONS OF CONSTRUCTING FEMALE-HEADED HOUSEHOLDS AS THE  
'POOREST OF THE POOR'**

- \* Can potentially secure resources for women in development/social programmes
- \* Homogenises negative economic circumstances of female-headed households
- \* Ignores non-economic aspects of disadvantage in women's lives, such as unequal gender roles and relations, domestic violence etc.
- \* Ignores subjective meanings of household headship for women such as power, autonomy, self-esteem
- \* Neglects and/or deflects attention from situation of women in male-headed households
- \* Suggests that women in male-headed households do not experience poverty
- \* Places undue emphasis on household circumstances in exacerbating the poverty of women, rather than wider gender inequalities
- \* Devalues the efforts made by female-headed households to overcome gender bias and/or household vulnerability
- \* Contributes to negative image of female-headed households
- \* Pathologisation of female headship can contribute to narrowing their livelihood possibilities
- \* Gives rise to programmes which focus on women only rather than on women and men, and/or gender relations (WID vs GAD)
- \* Ignores lone father households
- \* Serves neoliberal agendas for efficiency and the substitution of universal social programmes with targeted programmes
- \* Leads to targeted programmes for female heads of household which, to date, do not seem to have appreciable benefits in respect of raising women's status, social legitimacy and well-being, and/or diminishing inequalities in gender or between household structures
- \* Objectification of female heads as a group in need (rather than as a group with rights)
- \* Serves conservative agendas for strengthening marriage and the 'traditional family',
- \* Gender inequality becomes conflated with poverty

**Source:** Chant (2003: 64).

## Box 7

**'ENGENDERING' PPA AGGREGATE SUMMARIES: SUGGESTIONS RELATING TO THE  
WORLD BANK STUDY 'VOICES OF THE POOR'**

***Current summary (gender-neutral)*****Expression of Poverty**

Hunger

Disease (including HIV, alcoholism)

Lack of income

No land/property

Violence/insecurity

Exclusion from decision-making

Lack of water, electricity, roads

***Current Recommendations(gender-neutral)*****From Poverty to Resources**

From isolation to resources

From sickness to health  
including

From fear to security

***Potential addition (to highlight  
gender dimensions)*****How Women and Men are Affected**

Many women eat least and last

Women's reproductive health is  
neglected

Men's care costs more

Men's own actions increase risks

Few poor women have an income

Few women own/control land assets

Property is taken from widows

Women particularly vulnerable

Women excluded because of their sex

Increases women's workloads

***Potential addition (to highlight  
gender dimensions)*****Women/men**Eliminate discrimination with regard to  
land, property and so onSpecial attention to women's health,  
reproductive health

Combat violence against women

**Source:** Johnsson-Latham (2002:7-8).

Table 1

**GENDER-RELATED DEVELOPMENT INDEX (GDI): LATIN AMERICAN COUNTRIES**

	Gender-related Development Index (GDI)		Life expectancy at birth (years 2000)		Adult Literacy rate (% aged 15 years or more)		Combined primary secondary & tertiary gross enrolment ratio (%), 1999		Estimated earned income (PPP US\$), 2000		HDI rank minus GDI rank
	Rank	Value	Female	Male	Female	Male	Female	Male	Female	Male	
Argentina	33	0.836	77.2	70.1	96.8	96.8	86	80	6556	18424	0
Bolivia	96	0.645	64.2	60.8	79.3	92.0	67	73	1499	3358	0
Brazil	64	0.751	72.0	64.1	85.4	85.1	80	79	4557	10769	0
Chile	39	0.824	78.6	72.6	95.6	96.0	77	78	5133	13786	-2
Colombia	56	0.767	74.8	68.2	91.7	91.7	73	73	3996	8558	3
Costa Rica	41	0.814	79.3	74.6	95.7	95.5	66	67	4609	12577	0
Cuba	--	--	78.4	74.5	96.6	96.8	77	76	--	--	--
Dominican Republic	79	0.718	70.0	64.8	83.6	83.6	75	69	3125	8849	-1
Ecuador	80	0.718	73.0	67.8	90.0	93.3	74	80	1455	4936	-3
El Salvador	87	0.696	73.1	67.1	76.1	81.6	64	63	2347	6727	-1
Guatemala	100	0.617	68.0	62.2	61.2	76.1	45	53	1836	5772	0
Honduras	98	0.628	68.9	63.2	74.5	74.7	63	60	1295	3596	0
Mexico	49	0.789	76.0	70.0	89.5	93.4	70	71	4978	13152	0
Nicaragua	97	0.629	71.1	66.4	66.8	66.3	65	61	1431	3310	2
Panama	51	0.784	76.8	72.2	91.3	92.5	76	73	3960	8004	0
Paraguay	75	0.727	72.6	68.0	92.2	94.4	64	64	2155	6658	0
Peru	73	0.729	71.6	66.6	85.3	94.7	79	81	1950	7695	-3
Uruguay	37	0.828	78.5	71.0	98.1	97.3	83	76	6178	12068	2
Venezuela	57	0.764	76.2	70.4	92.1	93.1	66	64	3334	8223	3

Source: UNDP (2002: Table 22).

Note:-- = no data.

**Table 2**

**GENDER EMPOWERMENT MEASURE (GEM): LATIN AMERICAN COUNTRIES**

	Gender empowerment measure (GEM)		Seats in parliament held by women (as % of total)	Female legislators senior officials & managers (as % of total)	Female professional & technical workers (as % of total)	Ratio of estimated female to male earned income
	Rank	Value				
Argentina	--	--	31.3	--	--	--
Bolivia	55	0.450	10.2	36	40	0.45
Brazil	--	--	6.7	--	62	--
Chile	49	0.474	10.1	26	52	0.37
Colombia	42	0.509	12.2	38	49	0.47
Costa Rica	26	0.579	19.3	33	46	0.37
Cuba	--	--	27.6	--	--	--
Dominican Republic	40	0.514	14.5	31	49	0.35
Ecuador	46	0.484	14.6	28	47	0.29
El Salvador	52	0.454	9.5	33	47	0.35
Guatemala	--	--	8.8	--	--	--
Honduras	60	0.405	5.5	36	40	0.45
Mexico	38	0.517	15.9	24	41	0.38
Nicaragua	--	--	20.7	--	--	--
Panama	48	0.475	9.9	33	46	0.49
Paraguay	59	0.408	8.0	23	54	0.32
Peru	39	0.516	18.3	28	39	0.25
Uruguay	36	0.519	11.5	36	54	0.51
Venezuela	56	0.442	9.7	24	58	0.41

**Source:** UNDP (2002: Table 23).

Note: -- = no data.

**Table 3**

**PERCENTAGE OF MALE AND FEMALE LABOUR FORCE IN THE INFORMAL SECTOR:  
SELECTED LATIN AMERICAN COUNTRIES**

	Percentage of non-agricultural labour force in the informal sector, 1991/1997		Women's percentage share of the informal sector in the non-agricultural labour force 1991/1997
	Women	Men	
Bolivia	74	55	51
Brazil	67	55	47
Chile	44	31	46
Colombia	44	42	50
Costa Rica	48	46	40
El Salvador	69	47	58
Honduras	65	51	56
Mexico	55	44	44
Panama	41	35	44
Venezuela	47	47	38

**Source:** United Nations (2000: Chart 5.13).



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