

The Intrahousehold  
Disadvantages Framework:  
A Framework for the  
Analysis of Intra-household  
Difference and Inequality.

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## Executive Summary

This paper has been funded by the Remote Rural Areas component of the Chronic Poverty Research Centre<sup>1</sup>. Its purpose is to introduce the IDF (Intrahousehold Disadvantages Framework) which provides researchers with a set of practical tools to analyse intra-household differentiation. We feel that this is necessary if researchers are to be able to present more accurate findings.

Numerous culturally, temporally and spatially specific dimensions of social difference affect intra-household decision-making and resource allocation. To date, development research has tended to focus on gender. A strong literature and a wealth of approaches have been developed to assess the impact of socially determined gender roles and subordination on the individual and on development interventions. This provides a strong starting point in the development of tools to help in the systematic analysis of other forms of social difference, for example, age, birth order, physical and mental disability, illness, and relationship to household head. Until now most research into these areas has relied on inductive research which has focused on the problems of a specific group (e.g. older people). This has tended to generate descriptive findings which have rarely contextualised individuals from these groups within their households or sufficiently acknowledged either the differentiation within groups or the overlaps between groups. The focus on individual forms of disadvantage has tended to result in the ‘bidding up’ the problems faced by a particular group vis à vis another, rather than building an holistic understanding of social difference. The frameworks we present in section 4 of this paper are intended to provide the starting point for such holistic analysis.

Traditionally social science has depended on the household as its basic building block for research and analysis. Collecting sub-household level data has often been felt to be impractical as it could generate huge volumes of information, which then has to be analysed, presented and used. Researchers and policy makers have therefore often preferred to investigate only down to the household level, feeling this to be ‘quite micro enough’. However, as we indicate in this paper, the household means different things to different people, in different times and places, and by using the household as a unit, researchers and policy makers make a set of implicit assumptions about what takes place within it. Individuals within a household are often assumed to be equally wealthy or poor and to have equal access to goods and services. Household models have presented the household as a sharing, altruistic and co-operative body with a unitary utility function. These models have, however, been widely criticised, particularly by gender specialists, who argue that the household is a site of multiple voices, gendered interests, unequal resource allocation, and (possibly) conflict. It is increasingly understood that the household is a complex unit of analysis and that within the household there are potentially differing levels of wealth, consumption, leisure and work. It is also increasingly recognised that intra-household resource allocation and decision-making are affected by multiple factors including individual agency, power and information asymmetries, supra-household social relations, and non-household institutions.

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<sup>1</sup> See [www.chronicpoverty.org](http://www.chronicpoverty.org)

Numerous economic models (including co-operative and non-co-operative approaches) have been constructed in order to capture the individuality of household members, and the possible differences in their preferences more effectively. Nevertheless, ‘altruistic’ unitary household models continue to exert a powerful influence on how households are thought about and how data is collected within the development field.

Various gender-analysis frameworks attempt to promote understanding of the complex nature of intra-household relations, and to incorporate this knowledge into development planning, through the systematic study of the differences in the roles, responsibilities, and access to and control over resources of women and men. However, even the most complex framework can only present a crude image of reality, due to the far more complex nature of real life, allowing crucial information to be lost. Specifically, gender-analysis frameworks focus on gender as *the* dimension of difference within the household (arguably alongside age).

In this paper we present a critical analysis of existing gender frameworks, focusing on their applicability to analysing other dimensions of intra-household difference (not their inherent value *per se*). This identifies a set of tools and concepts which will help provide an analytical starting point from which to examine these (non-gender) intra-household asymmetries. However, we recognise the complexity of this task, and a framework which attempts to examine multiple dimensions of difference risks being resource hungry and producing distorted data and information overload. In an attempt to counter these dangers, we present a two-tier framework that examines the impact of “clusters of disadvantage” on intra-household resource allocation and decision-making (these “clusters” are locally identified, and reflect real individuals within the community who are most likely to be amongst the poorest of the poor).

The first tier of analysis, at the community level, is designed to identify various clusters of disadvantage that exist within the community; to examine what individuals continue to do, and with what resources, despite their disadvantages; to locate their disadvantage and discrimination or subordination in the wider socio-economic context; and to identify their practical and strategic needs.

The second tier of analysis, at the intra-household level, examines in detail two or three households in which a member characterised by a “cluster of disadvantage” lives. These case studies will help triangulate community level data; contextualise the individual within the household by identifying the roles and activities of all household members; and examine the dynamic capacities, capabilities and vulnerabilities of those characterised by a “cluster of disadvantage” (which may indicate possible interventions to improve their well-being). We suggest that researchers collect several case studies for each “cluster of disadvantage” to provide an opportunity to examine both the range of experience of people with specific sets of disadvantage, and the norm.

These tools and concepts are *a starting point* for the critical analysis of intra-household inequality. Substantial innovation may be required depending upon local situations and realities, and ultimately, frameworks and tools are only guides for analysis. In addition, we do not see this framework replacing specialist investigations of gender, impairment or age (for example); such work will often be necessary to

deepen understanding prior to policy or programme design. However, the results generated by the Intra-household Disadvantages Framework should provide a schematic map showing the implications of disadvantage at the community and intra-household level - to which detail can be added. The accuracy of this map will depend on researchers and policy-makers training “the muscles of perception (hearing and seeing) to be able to focus on marginalised groups and individual differences, and to recognise how one’s own limitations influences perception” (Stubbs, 1995) . If they fail to do so, the practical value of any framework, and its impact on poverty reduction, will be limited.

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# **Intra-household Difference and Inequality.**

## **1. Introduction.<sup>2</sup>**

### **1.1. The purpose of this paper.**

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<sup>2</sup> This paper began its life following a presentation delivered by Kate Bird at the ‘Research Design Workshop for Exploring Appropriate Solutions to Chronic Poverty’ (Held on 15th and 16th May, 2002, organised in partnership by IIPA-Ministry of Rural Development and CPRC). The presentation highlighted the need to develop methods for extending tools derived from gender analysis to enable them to analyse other forms of social difference.

Thanks to David Hulme, Karen Moore and Rebecca Yeo for their helpful comments on the first draft of this paper.



household inequality, bargaining and conflict (Kabeer, 1994), and since the 1970s the unitary model of household collectivity has been widely criticised, most notably by feminists, who have forcefully argued that the household, a permeable and variable structure, can be a site of negotiation, bargaining and conflict. Unfortunately, however, this critique has not prevented unitary, altruistic household models from continuing to exert a powerful influence within the development field.

To counter this influence, numerous gender analytical frameworks have been constructed to promote gender-awareness in mainstream development planning, and even to establish 'gender planning' as a type of planning in its own right (Moser, 1993). The fundamental element of these frameworks, despite significant differences, is recognition that men and women have different socially-constructed roles that affect decision-making processes and resource allocations within the household. Gender frameworks attempt to encourage a systematic study of the differences in the roles and responsibilities of women and men, and their access to and control over resources, while some promote examination of the gendered nature of social organisations and institutions.

However, unsurprisingly gender frameworks are generally only used to examine gender (and possibly age: girl/boy, woman/ man, older woman/ older man). Although hugely significant (and arguably over-arching all other aspects of intra-household difference), gender represents only one dimension of difference or disadvantage within the household. From descriptive documentation, we know that many forms of difference exist and affect intra-household decision-making processes and resource allocation; these include age and birth order, relationship to household head, illness, disability and incapacity, and so on. However, despite recognition that various aspects of difference affect household processes and power relations, the critical analysis of these differences has largely been ignored.

This paper is intended to suggest a set of tools and concepts that will help to provide an analytical starting point from which to critically analyse these (non-gender) intra-household asymmetries; this will be done by drawing upon existing gender frameworks. The paper is divided into four key sections. The first will briefly examine the concept of the household, discussing the evolving attempts to define and model the complex, locally and temporally specific reality that is the household. The second section will attempt to reinforce the theoretical argument that the household is not simply a site of altruism and co-operation, but is also a site of negotiation, bargaining and even conflict, by briefly discussing (with relevant case studies drawn from primary research in Uganda) some of the potential inequalities that may exist within the household. The third section will present and critically analyse various gender analytical frameworks from the perspective of their applicability to analysing other dimensions of intra-household difference. The fourth section will then present a set of tools and concepts, with examples, to assist in the critical analysis of (non-gender) dimensions of intra-household difference.

## 1.2. The Household<sup>3</sup>.

*'An understanding of the [intra-household] allocation of resources and responsibilities is essential to predict the consequences of policy decisions and the impact of development projects.'*

(Rogers, 1983 cited in Haddad, 1994:347)

Since the 1970s, reflecting a coming together of feminist analysis and mainstream economics and anthropology, there have been three major developments in the analysis of the household (Chen & Dunn, 1996). The first, and most notable, development has been a move away from models of the household that emphasise sharing, altruism and co-operation, to models which include the possibility of negotiation, bargaining and even conflict. The second major development has been “a shift from the analysis of the household as a bounded unit towards a view which stresses its permeability” (Moore, 1994:86 cited in Chen & Dunn, 1996) and its embeddedness within wider structures (including ‘supra-household’ level social groups and social networks, and the market). The third development has been the recognition of the enormous variability in household composition and structure both between and within societies as well as over time. This of course raises the issue of how the household is defined.

The household, an important but complex unit of analysis, can be defined in numerous ways. For example, the (nuclear) family or kinship unit; those who share a common residence; or those who share a joint function such as consumption, production, investment or ownership (functions that do not necessarily coincide) (Chen & Dunn, 1996). This potential variety of definitions is reflected in the literature. Chayanov (1966) identified the household as a place of exchange, while Becker (1965) saw the household as a place where commodities are produced and utility is generated, according to one set of preferences, by combining time, goods purchased in the market, and goods produced at home. However, neither of these defines the household, they simply tell us what it does. Evans (1991) observed that households are often shifting, flexible structures whose boundaries are difficult to discern, made up of a collection of individuals usually assumed to have a kin relationship with each other. The United Nations, however, supports a more pragmatic definition that ‘a household is a group of people who live and eat together’. A variation of this definition is that the household is where members share a common source of major income and food, and they sleep under the same roof or in the same compound. When analysing the household, researchers must be much more definite about their use of the household, stating clearly the assumptions that underpin the research.

Compared to anthropologists, economists are relatively silent on household definition or composition, instead developing more formal models of household behaviour (Chen & Dunn, 1996). Traditional neo-classical economists apply a *unitary* model to household decision-making. This views the household as a collection of individuals who behave as if they are in agreement on how best to combine time, goods purchased in the market, and goods produced at home to produce commodities that

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<sup>3</sup> This section is substantially based on Bird, 2002a and Bird, 2002b.

maximise common utility<sup>4</sup> (Quisumbing & Maluccio, 2000). This approach is sometimes referred to as the *altruism* model or *benevolent dictator* model, based on the notion that either all household members share the same preferences, or that a single (presumably male) decision-maker makes decisions for the good of the entire household, although some of these might appear brutal.

Unitary models, the “black box” of household collectivity (Kabeer, 1994:98), have been widely criticised, even within the discipline. Feminists have forcefully argued that instead of household unity, there exist multiple voices, gendered interests, and an unequal distribution of resources within families and households (Wolf, 1997); consequently, the household is a site of conflict as well as co-operation (Doss, 1996). Furthermore, households are ever-changing, as members come and go when new opportunities (or constraints) present themselves (Doss, 1996). Unitary models’ failure to recognise this complex reality has led to limited understanding of intra-household resource distribution and decision-making, and multiple types of policy failure (Quisumbing & Maluccio, 2000).

Concerns regarding the underlying assumptions of unitary models have spawned a number of alternatives that focus on the individuality of household members and the possible differences in their preferences (Quisumbing & Maluccio, 2000) (Figure 1). *Collective* models (the most significant alternative to unitary models) allow for differing preferences, and assume that household allocations are made in such a way that the outcomes are *pareto-optimal* or *pareto-efficient*<sup>5</sup>. Nothing is assumed at the outset about the nature of the decision-making process, but is instead estimated from collected data (Quisumbing & Maluccio, 2000). Two sub-groups of collective models emerge if one is willing to put more structure on the decision-making process, one rooted in *co-operative* and the other in *non-co-operative* game theory (Quisumbing & Maluccio, 2000).

Co-operative models assume that individuals have free choice as to whether they live singly or join together to form a household, with the key basis of the decision being utility<sup>6</sup>. Within this category there are two models of decision-making. The first presents decisions as the outcome of a *bargaining power* process, with individuals pushing for their preferences, but compromising with the ‘fall-back’ position being determined by the costs an individual would face if agreement were not reached and the break-up of the household and division of household assets ensued. Once a household is formed, decisions within the household are therefore made on the basis of who would gain, and who would have the most to lose if the household broke up

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<sup>4</sup> ‘Utility’ is used in economics as shorthand for well-being or happiness. The ‘utility function’ is the equation used to calculate what a person’s or household’s utility is made up of:  $U = f$  (2 square meals a day, enough clean drinking water, affordable and culturally appropriate clothing, involvement in community/social interaction, the respect of others, etc.).

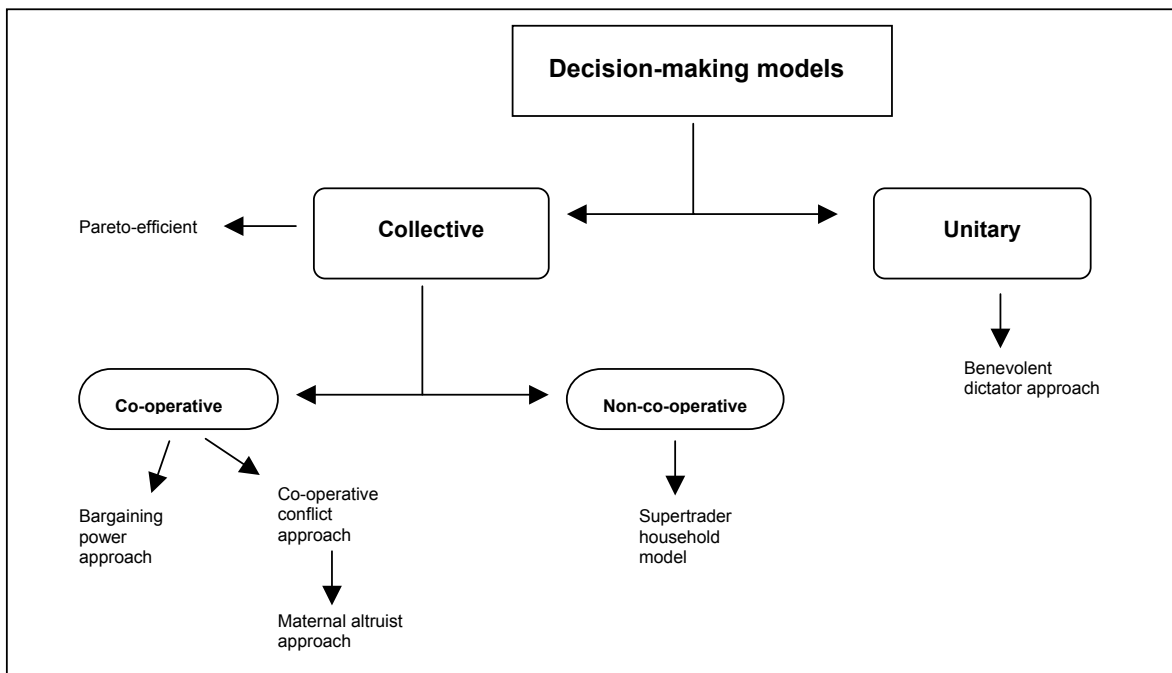
<sup>5</sup> The Pareto criterion is when the welfare of one person is increased without reducing the welfare of any other person; it makes no allusion to either the comparative levels of welfare of the individuals before the change, nor to the initial income distribution between them (Ellis, 1988). A pareto-optimal allocation is reached when one individual within the household can only be made better-off at the expense of another household member (Quisumbing & Maluccio, 2000).

<sup>6</sup> Quisumbing & Maluccio (2000) argue, however, that it is possible that individuals (particularly females) may not have a choice about getting married or forming a household. Furthermore, in many contexts, the decision to marry/form a new household may be motivated by *non-economic* factors, such as society’s view of unmarried individuals.

(this depends on extra-environmental parameters, such as laws concerning access to common property, and the conjugal contract, which is itself dependent on socio-cultural factors, individual agency and personal attributes) (Haddad, 1994). The second, *co-operative conflict* model, recognises individuals as possessing separate preferences, but claims that these preferences embody perceived notions of role and obligation within the family. These perceptions fundamentally alter the approach taken to conflict resolution, such that a subordinate stance results in giving way even if actual well-being is adversely affected (Ellis, 1988). An example of this model is the *Maternal Altruist* approach which sees women as being often under more social pressure than men to subordinate their basic needs to those of other family members, resulting in displays of ‘maternal altruism’.

Non-co-operative models are somewhat less common in the literature, but can be represented by Becker’s *Supertrader* household model (Becker, 1981). This model assumes that individuals cannot enter into binding and enforceable contracts with each other, and are not constrained by social norms; they consequently ‘trade’ (bargain, barter and negotiate) using implicit prices to determine resource allocation, with their actions conditional on the actions of others<sup>7</sup>.

**Figure 1: Household decision-making models.**



*Adapted from Bird, 2002a.*

The variety of household models briefly discussed indicates the problem of generalising an institution that is culturally and location specific, and whose

<sup>7</sup> While all co-operative models are Pareto-efficient, only some non-co-operative ones exhibit this property. Those that do not can be classified as non-collective models (Quisumbing & Maluccio, 2000).

composition changes over time. As we know from our own experience, and as shown by Miller (1997:1694), even local studies on intra-household decision-making “will and must discover conflicting findings” because local variations are real and do exist.

Increasingly it is understood that intra-household resource allocation and decision-making are affected by multiple factors including individual agency, power and information asymmetries, extra-household social relations, and non-household institutions. Consequently, the household can be seen not simply as a site of altruism or co-operation, but as a site of negotiation, bargaining and even conflict, where individuals have differential access to and control over resources and benefits. This could potentially result in differential levels of wealth and poverty, consumption, and leisure and work within the household. In fact, recognising that households follow allocative rules that may not always protect the most vulnerable members is of great significance in the study of chronic poverty, the selection and design of development projects (Rogers, 1990), and for the development of pro-poor policies. Nevertheless, ‘altruistic’ household models of neo-classical economists continue to exert a powerful influence on how households are thought about and how data is collected within the development field (Kabeer, 1994). Consequently an acknowledgement of the socially constructed separation of responsibilities and the privatised control of resources within households rarely extends to policy provision.

## **2. Aspects of Intra-household Difference.**

The previous section argued that the household is not simply a site of altruism and co-operation, but is also a site of negotiation, bargaining and even conflict. This section will reinforce that theoretical argument by briefly discussing (with relevant case studies drawn from primary research in Uganda and India<sup>8</sup>) some of the potential inequalities that may exist within the household.

### **2.1. Gender.**

Gender is the most widely discussed aspect of intra-household difference. Within the household (and the community) a socially-constructed gender division of labour exists that generally places greater time and energy demands on women than on men (Moser, 1993); there is often limited substitutability between male and female labour on specific tasks (Kabeer, 1994). For example, in many societies, even fathers who are unemployed, underemployed or engaged in home-based income-earning activities devote very little time to childcare (ibid.). Under patriarchal social systems, women are commonly subordinated by men, who often control the property, resources and income of the household (Ellis, 1988), while restricting women’s mobility, dress, behaviour and/ or interpersonal ties (Sen, 1997). Asymmetrical power relations often result in the discrimination of women and girls in terms of the intra-household distribution of resources, including food, and access to healthcare and education (Kabeer, 1994). Despite power and resource inequalities, women often do obtain their

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<sup>8</sup> The names of all individuals have been changed to protect their anonymity.

own income through farm and non-farm activities (Ellis, 1988)<sup>9</sup>; significantly, the gender of the person controlling a resource appears to have a systematic effect on patterns of resource allocation within the household (Kabeer, 1994). For example, increased household income, if earned by the mother, is likely to promote girls' enrolment and achievement (Glick & Sahn, 2000)<sup>10</sup>.

The case study below, from Kirchali village, south western Madhya Pradesh - a tribal zone, where women have more independence and agency than in many parts of the sub-continent - illustrates how domestic violence may be used as a mechanism for training young wives in the practical implications of their subordination. It highlights the need for sensitive intrahousehold analysis, and shows how an understanding of socio-cultural context and gender roles must be a strong part in any such analysis.

**Box 1: 'Its for your own good.' (Lessons in wifelyness)**

Sada Bai, the sixteen year old daughter of the Patil<sup>11</sup>, was visiting her family and home village for a few days. She walked from the neighbouring village where she lives with her husband of 18 months. She was delighted to be home as she hates married life. Her husband and her in-laws give her lots of farm and home-based work to do. If she does not do it in the way they like it done she is beaten by her husband. This happens a lot. She preferred life before she was married. She would work hard for her parents, but they were happy with the work that she did and she did not live in fear of beatings.

Sada Bai's story is repeated by many of the other women that we talked to. It became clear that it was normal for women to be beaten by their husbands. Beatings were common when men drank, but they were most intense during the first few years of marriage, and seemed to be used to get a young wife to conform and work hard.

Few parents intervene on their daughter's behalf and few wives leave. Domestic violence is a part of everyday life, and women who do not conform are shunned and ridiculed by others.

Source: Life history interview conducted by Kate Bird in Kirchali Village, Barwani District, Madhya Pradesh, India, December 2002.

The case study below, also from Kirchali, illustrates how transgressive behaviour is punished by rural society. The label of madness is used to punish a woman who has rebelled against her culture's gender norms.

<sup>9</sup> However, patriarchal social relations may constrain women's opportunities to spend this income; this may help explain the concept of 'maternal altruism' – women may invest more in their children because the opportunity to invest elsewhere is limited (Devereux, 2001).

<sup>10</sup> Interestingly, increases in household income *may* have little significant impact on boys' education (Glick & Sahn, 2000).

<sup>11</sup> traditional tribal village leader in Kirchali Village, Madhya Pradesh

**Box 2: ‘You must be mad!’ – the sanctioning of social rebels.**

Chanka Bai is one of the poorest people in Kirchali Village. She is unmarried, has no children and, although her younger brother and his wife live within view, she lives alone. Others in the village think of her as quite mad. They think she is dirty and behaves abnormally, but her transgressive behaviour seems to be no more than her not conforming to gender norms. She used to cultivate land without male involvement and travels outside the village, including to market, alone. She is also willing to stand up for her rights, and although poor women are usually fearful of interacting with officials, when harassed by neighbours, she reports them to the police.

Her unusual behaviour probably developed after her parents died of chickenpox when she was 10 or 11. She and her four year old brother went to live with one of her two married sisters in a neighbouring village. When she died they moved back to the village and re-joining her older brother. He died soon afterwards and she was left bringing up her younger brother alone. She farmed and took produce to market, taking on a mix of traditionally male and female roles. This mix exposed her to the outside world and made her different from other girls in the village, affecting her marriage chances. Villagers told us she had been married twice but that the marriages had failed immediately because ‘who would want to live with her!’ Chanka Bai herself said that she had never married, as her older sisters had wanted her to look after their brother and the family property. The truth is probably that she did have two very brief marriages having spent her whole youth looking after her brother.

Women access land through their fathers or husbands. As Chanka Bai is orphaned, has no sons and is not married, she no longer has access to land. When her brother grew up and married the family land passed to him. She lived with them for some time, but after a row with her sister in law she moved out of the family home. She now feels that she is seen as a trespasser on the family land and relatives accuse her of stealing crops.

After she left her brother’s house, she was homeless for three years and lived in a makeshift shelter under a large tree. She developed a severe skin disease which villagers interpreted as evidence that she was cursed. They feared sharing a cooking or drinking vessel with her and would not go near her. She became even more isolated. Without a proper diet or treatment her condition worsened and the roads were impassable because of the monsoon rains. Eventually a chance visit from a cousin from Indore resulted in her being taken to hospital, where she spent several weeks. Some time after this she was identified by visiting officials as needy and got a government grant which enabled her to buy the roof tiles. By selling some chickens she was able to build a house and her situation began to improve.

Although she is no longer shunned she has a difficult relationship with others from her village. When she has stored food, or anything else for that matter, people assume that she has stolen it. Seen as a mad, dirty thief and without a male protector, she is often harassed. Youths (including her own nephews) throw liquor bottles at her house and call her names. To the interviewer, she did not seem mad, was not dirty and swore that she did not steal. During our interview, a group of men (mainly her relatives) came and joined us. We were told not to listen to anything that she said, and she was warned to take care what she told us. She told us through tears that they would be back later to harass her.

Source: Life history interview conducted by Kate Bird in Kirchali Village, Barwani District, Madhya Pradesh, India, December 2002.

## 2.2. Relationship to household head

### 2.2.1. Polygamy<sup>12</sup>.

The practice of polygamy, common in many societies, can promote significant inequalities within the household, providing a catalyst for potential conflict. Gwanfogbe *et al* (1997:66) claim that polygamy is “often advantageous” for the senior wife as she exercises authority and control over the junior wives; the senior wife can be instrumental in the selection of her co-wife, with the additional wife assisting her with childcare and domestic and economic activities. Oni (1996) concurs that *if* the wives agree and *if* their husband treats them with scrupulous fairness, the household *may* live together happily. However, senior wives may suffer reduced security and status as a consequence of their co-wives’ presence, while the husband is more likely to allow his favourite wife access to his resources than his other wives are, giving rise to jealousy and conflict (Oni, 1996). There is in fact often significant discrimination against unfavoured wives and their children, resulting in heavier domestic workloads, poorer access to education, and in some case poorer levels of nutrition and healthcare (Bird & Shinyekwa, 2003). For many women, polygamy is a serious cause of conflict, contributing to increased domestic violence and eventual household break-up (Bird & Shinyekwa, 2003). While for children, the unequal allocation of resources and tasks significantly affects their life-chances (Bird and Shinyekwa, 2003); some children (i.e. those of unfavoured wives) are at great risk of morbidity and mortality (Oni, 1996).

The case study below, drawn from qualitative research in Mbale District, Uganda, illustrates the long term impact that an unsuccessful polygamous marriage can have, not just on the wives, but on the children as well.

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<sup>12</sup> Technically the term *polygamy* refers to having more than one wife *or* husband at once, while the term *polygyny* refers to polygamy in which one man has more than one wife. However, accepting common usage and perception, this paper will use the term polygamy when referring to the situation whereby one man has married more than one wife at once.



### **Box 3: The long-term impact of marital conflict.**

Laurant is 22. The story of his life illustrates the potentially long-term impact of conflict within the household. His father is an alcoholic and regularly beats his mother. Laurant has tried to intervene, but feels unable to protect Agatha from his father's drunken rages. Their poor relationship affected him as a child, and has strongly influenced the way his life has turned out, influencing his diet as a child, his access to education, the amount of land he now has to farm and his choice of wife.

Laurant's father is relatively wealthy by village standards. He had five acres of land, a range of productive and household assets<sup>13</sup> and a better quality house than many, with internal walls separating the living space into separate rooms. The household had two granaries, and they used to have a number of cattle and goats. He was respected in the community and was the elected village head<sup>14</sup> until 18 months ago. Nevertheless Laurant is poor. He believes that he and his household are in the bottom quarter of wealth in the village. He has only an eighth of an acre of land, too small to ensure a year round food supply for his family and he has to make bricks and do odd jobs to make ends meet. He and his family have few possessions but they do own four chickens, and a mother goat and kid, indicating that they are not amongst the very poorest in the village and they might be able to use the livestock as the basis to accumulate slowly and improve their situation.

Laurant's father had two wives. His mother, Agatha, was the first wife, but it was the second wife who was favoured. When Laurant was a child, his father gave his step-mother meat to cook for herself and her children, but only vegetables to his mother. When Laurant was only a few months old his father lost his Kampala-based job in a hotel. He chased Agatha away and sold off household assets in an attempt to maintain consumption levels for his second wife. Agatha left her children behind<sup>15</sup>, but Laurant's 'stepmother' refused to feed them. His father claimed that Laurant was illegitimate and singled him out for harsh treatment. When Agatha found out what was happening, she collected her children and took them to live with her at their grandfather's house. But she had difficulty supporting them as a single mother, resulting in the children being shuttled between their father's and their grandfather's house. She kept Laurant with her, to protect him and eventually, when Laurant was 2, decided to go back to her husband. This seemed to be the only way to ensure that everyone had enough to eat. She and her husband had several more children, but by the time Laurant was six the marriage had broken down again. She left, but returned *again* when he was 14 to ensure that her sons were given some of their father's land when they got married.

Laurant knew that with his family's history of problems it would be difficult to find a woman prepared to marry him, but 2 years ago he was introduced to a secondary school drop-out who was eight weeks pregnant. He is delighted with his wife, has adopted her daughter, and they have had a son together. There is little now left of the family's former wealth for Laurant and his five brothers to inherit, and Laurant received only  $\frac{1}{8}$  acre from his father when he got married. They depend on brick building and casual work to in order to have enough food to eat.

What is clear is that Laurant's poverty is not simply due to the erosion of family assets. It is also the long-term outcome of strife between his parents, the systematically unequal distribution of resources within the household, and the damage to his family's reputation made by his father's alcoholism and his parent's erratic relationship.

Source: Life history interview conducted by Kate Bird and Isaac Shinyekwa in Buwapuwa, Mbale District, September 2002.

<sup>13</sup> e.g. 9 hoes, a panga (large bladed multi-purpose slashing/cutting tool), an axe, 5 saucepans, a bicycle, a radio

<sup>14</sup> LC1 Chairman (the LC1, or Local Council 1, is the lowest of five layers of local government in Uganda, equates with a Ward in the UK, and tends to cover just a village or small urban community)

<sup>15</sup> This is entirely normal in a Ugandan setting. Men do not pay maintenance for ex-wives and children, so leaving your children with your husband is often the only way of ensuring that they will get fed.

### **2.2.2. Adoption and fostering.**

Fostering and adoption are widespread in developing countries and it is likely to become more so, partly as a result of the impact of HIV/AIDS. Adopted children can encounter a range of experiences, from being treated like the children of their adoptive parents to being treated as cheap labour. This range indicates that within a non-poor household a child may receive the nutrition, health care and education and have levels of well-being equivalent to the chronically poor. Moore suggests that the range of education and health related investments made by foster and adoptive families may depend on the reasons that the child was transferred into their household (Moore, 2001:12). Childless couples and lonely elderly people wanting some company were more likely to treat the children well than if the transfer was the result of divorce, death or migration (ibid). Our own research in rural Uganda has not supported this, and differential treatment has appeared to be more the result of intangibles such as family dynamics and personality.

The case study below (Box 4) illustrates the contrasting experiences of adoption that one woman had during her childhood. It highlights the power that adoptive parents can have on determining equality or differentiation within the household, and how their decisions affect the access to goods and services and the long-term well-being and happiness of the adopted child.

### **2.2.3. The poor relative.**

Households can be complex, composed of not just the nuclear, polygamous or multi-generational family. Households may be both multi-generational and extended by the presence of distant relatives. These relatives may be welcomed into the household - where they share in decision-making, work and consumption in an equal manner - or there may be a number of asymmetries.

The case study below (Box 5) provides some insight into how the son of a rich household viewed the 'strangers' attracted to join his father's compound when he was a boy. It shows that there was acute rivalry for resources between 'son's of the household' and 'strangers', sometimes resulting in physical fights. Also 'son's of the household' presumed a 'right of first refusal' in marrying female 'strangers' who had grown up in their compound, because they had 'eaten our food'.

#### **Box 4: Adopted and loved?**

Seguya Prossy, a refugee from Teso, is in her mid 30s. She lived 25km from the far shore of Lake Kyoga until she and others were driven out by the Iteso during inter-ethnic clashes in the mid 1980s. The story of her early childhood illustrates the way that resources within a household may not be evenly distributed.

Her mother was her father's first wife. She produced two daughters and Prossy was the second born. When Prossy was too young to have a memory of it, her parent's marriage broke down. Her mother left and Prossy and her sister were to be brought up with her father and her mother's co-wife. Unfortunately their 'step-mother' mistreated them. She beat them and gave them a lot of work to do – more than it is normal to give young girls. They also did not get enough to eat. While her father was at home, the whole household ate together, but if he was away their step-mother separated the children. She and her children would eat a meal while Prossy and her sister were sent on an errand. By the time they got back all the food would be gone. She and her sister never went to school because 'there was no money to send them'. Maltreatment increased after their father died when Prossy was 7. Their 'step-mother' married again, abandoning them. Clans people came to their house and stripped it of all productive and household assets. The family farm was taken over by some of her cousins, and although she would eventually have benefited from it, they were exiled by the Iteso, 1986, leaving her with nothing.

After her 'step-mother' died she and her sister went to live with her aunts. Here the situation was very different. Although they had eight children of their own, Prossy and her sister were made to feel part of the family. She and her sister were treated just like their children, her cousins regarded her as an older sister and although she was given chores to do, they were the normal tasks given to children.

Source: Life history interview conducted by Kate Bird and Isaac Shinyekwa in Kiribairya, Kamuli District, September 2002.

#### **Box 5: Poor relation: another pair of hands.**

Patrick Maremu is one of the richest men in Buwapuwa village. He is rich in property and people. As well as 40 acres of land and a large compound with several houses, kitchens and latrines, he has three wives, ten children and thirty three grandchildren.

His father was also a rich man and his story illustrates the magnetic role of rich patriarchs. His wealth enabled him to support a large household. He had eight wives (two were barren and six bore him children) eighteen sons, six daughters and more than twenty 'strangers' living in the family compound. Some were servants, but the majority were relatives of one of his wives who accompanied her when she married. They were attracted to join the household because they knew that Patrick's father was a rich man and that they would eat well there. However, the household was 'polarised between the strangers and the legitimate sons of the house'. This rivalry would sometimes result in physical fights and on a day to day basis the 'sons of the house' would make the 'strangers' work hard and remind them that by their very presence they were reducing the amount of food available for the sons.

Some of the 'sons of the house' married 'stranger' girls 'you have eaten our food, now we will have you.' They seem to have presumed the right of first refusal.

However, this is a relatively mild version of the treatment that 'poor relatives' can receive. And the 'strangers' certainly benefited from connecting themselves to the household of Patrick's father.

Source: Life history interview conducted by Kate Bird and Isaac Shinyekwa in Buwapuwa, Mbale District, September 2002.

### 2.3. Children/ Birth Order.

Children do not only suffer unequal resource and task allocation within polygamous households; the specific needs of children are often ignored and subsumed by the needs of other, more powerful, household members (Johnson *et al*, 1995). In many societies there is evidence of ‘son preference’, whereby the needs of girls, and resulting allocation of resources, are secondary to those of boys (Choe *et al*, 1995); this preference helps explain why two-thirds of the 125 million primary school-age children not in school are girls (Watkins, 2000). However, birth order can significantly affect the perceived value of children to the household, which in turn influences the investment of resources in their well-being. For example, Choe *et al* (1995) argue that in China, female children with older siblings receive less favourable care than their male counterparts in terms of immunisations, quality of caring during illness, exposure to risk, and allocation of resources including food<sup>16</sup>. Furthermore, if a child’s biological mother is absent from the household (possibly replaced by a step-mother), less money is likely to be spent on food, and more on alcohol and tobacco, indicating children’s reduced consumption and increased adult (male) consumption (Case *et al*, 2000)<sup>17</sup>. Besides discrimination in resource allocation, children can be victims of violence and abuse within the household. Although very little is known about the extent of sexual and physical abuse of children within the household in the South, it is a reality; this is indicated by the significant proportion of street children who have run away from physical, verbal and sexual abuse at home (Baker, 2001).

#### **Box 6: Child Neglect/ Child Bride.**

Nakandi Gladys was born in 1950. Her parent’s marriage broke up when she was a baby and her mother left with her two young children. She and her brother were returned to her father’s compound when Gladys was 3 and from then onwards she was brought up by her step-mother. They were not a poor family and it should have been a pleasant childhood, but although her step-mother did her best, her father was a difficult man. On school days they were not given packed lunches or dinner money, but even so her father would not let their step-mother keep lunch for them to eat when they got home, saying ‘after all, we will all have supper.’ He limited the mixing they could do outside the house - they were not allowed to participate in ceremonies in the village, and he would not let them go to church or to extra-curricular activities at school. He did not buy Gladys any out of school clothes, telling her that her school uniform was enough.

When Gladys was 15 and in her 7<sup>th</sup> year of primary school her father decided she had been educated enough and stopped paying her school fees. Her brother was allowed to continue with his education and ended up going to Kampala to study. Gladys could not bear the thought of having to do all the chores and farm work alone, so she ran away and went to stay with her mother. Soon after this a casual labourer at a tea factory identified her as a suitable wife (hardworking and loyal). He paid lobolo (bride price) and, at the age of 16, she became his wife. This was the start of a new era for her because she was now able to make her own decisions.

<sup>16</sup> Firstborn daughters are considered by parents as likely to contribute to family welfare by performing household duties including childcare of younger siblings, and by contributing income through employment. These benefits are not believed to exist with subsequent daughters. Therefore, parents are willing to invest in the eldest female child, but will discriminate against subsequent daughters, resulting in higher levels of female childhood mortality (Choe *et al*, 1995).

<sup>17</sup> According to Case *et al* (2000), the benefits of having a child’s biological mother present is *limited* to those households in which mothers control food expenditure.

Her husband died in 1992, after a long illness. They had been married for 22 years. During his illness she sold their livestock to pay for treatment and she and her 8 children (3 more died in infancy) are now quite poor.

Source: Life history interview conducted by Isaac Shinyekwa in Kalangaalo, Mubende District, October 2002.

### **Box 7: Withdrawn from school.**

Life history interviews indicate that some children dropped out of school because their parents genuinely needed their help in productive or reproductive task. The pressure on parents has eased with universal primary education, however the cost of secondary education makes it unreachable for the majority. The removal of primary school fees has removed only part of the cost and many parents cannot afford the uniforms, books and loss of earnings associated with educating their children. A number of the life histories collected in Uganda and India show that fathers are less willing to invest in their daughters' education and that when a girl becomes pregnant it is likely to mean the end of her school career.

#### *Parental attitude/ needed for work.*

Nelson's parents were rich. They had over 60 acres of land and over 40 head of cattle. Their house was comfortable and there was enough for everyone to eat. Nelson was withdrawn from primary school when he was 15, after 4 years of schooling, because his grandfather in Luwero District was getting old, and needed someone to fetch water for him. Nelson resented having to leave school to go and live with his old relatives. It was difficult to adjust to the changed life. He stayed with his grandfather for 3 years and while he was there learned how to grow cotton and cassava and other farming skills.

Bomicomeila Christine came from quite a wealthy family. Her parents were illiterate and her father withdrew her from school after 3 years of primary education so that she could look after their cattle.

Ndugwe John was born in 1972 and was a school child during the 1981-85 war. His father was poisoned in 1981 (by a man claiming John's father had had an affair with his wife) and the conflict forced them to flee their home. The schools were poorly equipped due to the war, John did not have suitable clothes to wear to school and he had to help his mother support the family. These factors combined and John dropped out.

#### *Pregnancy.*

Nassolo Sophia's parents were not rich, but they weren't the poorest people in the village. Her mother died when she was young, so she had a lot of responsibility as a child, farming, fetching water and other household chores. However, her father was very supportive and encouraged her to continue with her education. She went to Kampala to go to secondary school and stayed with her cousin. She had a good life with her cousin and her cousin's husband would sometimes give her a lift to school in his car and buy her clothes.

She became pregnant when she was 15 and had to drop out of school. Her cousin and her father were very disappointed in her. The father of the child was around 30 and already married, but he was happy for her to be his second wife. He encouraged her to return to school after the baby was born, but she could not imagine leaving her child with someone else.

Makanika Grace was also a secondary school student aged 16 when she became pregnant and had to drop out of the first year of Senior School. Luckily her boyfriend, who was a fellow student supported her financially during the pregnancy. She found out that he already had a wife, but stayed with him for 7 years and they had 4 girls together. Then she 'ran mad' after being bewitched by her co-wife and she had to leave so that she could be treated.

Source: Life history interview conducted by Isaac Shinyekwa in Kalangaalo, Mubende District, October 2002.

#### 2.4. Disability & Ill-health<sup>18</sup>.

When discussing disability two initial points must be made. First, there is a need to distinguish between impairment and disability. According to Yeo (2001:3), impairment is an individual's condition (physical, sensory, intellectual or behavioural), while disability represents "a complex system of social restrictions imposed on people with impairments resulting in denial of rights and equal opportunities". Second, it is important to distinguish between disabled people according to some measure of the severity of their impairments; failure to distinguish different forms of impairment would have the effect of exaggerating the frequency of the problems, but understating their consequences (Berthoud, 2002, personal communication<sup>19</sup>). Individuals can suffer impairment as a consequence of maternal ill-health, particularly during pregnancy, or exposure to illness or injury during childhood or adulthood (Shepherd & Kyegombe, 2003 Draft; Choe *et al*, 1995). The impact of relatively minor illnesses and injuries can be deepened by late or inappropriate medical interventions (Bird, 2002c, see box below). Often impairment is not the consequence of a specific event, but of a process (for example, the degenerative consequences of arthritis or leprosy, leading to permanent impairment). However, even a small loss of physical or manual dexterity can result in downwards mobility into (greater) poverty (Erb & Harriss-White, 2001); while long-term medical costs can divert household resources away from other members (Pitt & Rosenzweig, 1990).

Most disabled adults (and those suffering degenerative illness such as HIV/AIDS) continue to work "more or less dysfunctionally" within the agricultural labour market or domestically (Erb & Harriss-White, 2001:17). However, limited employment opportunities, aggravated by discrimination and social exclusion, makes disabled people particularly dependent on families and vulnerable to abuse<sup>20</sup>, which can act to undermine their self-esteem (Jolly, 2002)<sup>21</sup> (see box, below). Within the household, disabled children often get last access to food and other basic resources<sup>22</sup> (Yeo, 2001), which can contribute to dramatically higher child mortality rates for disabled children compared to non-disabled ones – arguably a desperate but economically rational process of "weeding out" children with disabilities to reduce the burden on other household members (DFID, 2000:5). It is also important to recognise that the provision of care for a disabled (or ill) individual competes with other activities, such

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<sup>18</sup> An estimated 1 in 5 of the world's poorest people suffer some form of disability, and as many as 50% of these disabilities are preventable and are directly linked to poverty, with many the result of non-treated or inappropriately treated illnesses (DFID, 2000).

<sup>19</sup> Professor Richard Berthoud (May 2002), Institute for Social and Economic Research, University of Essex.

<sup>20</sup> For example, women with disabilities are 2-3 times more likely to be victims of physical and sexual abuse than non-disabled women (DFID, 2000).

<sup>21</sup> Many disabled people only require simple restorative equipment (spectacles, crutches, etc) to allow them to undertake reproductive or productive tasks with greater ease and efficiency, and enable them to participate more fully in domestic and community life (Erb & Harriss-White, 2001).

<sup>22</sup> For example, only an estimated 1-2% of disabled children receive an education, with disabled boys more likely to attend school than disabled girls (DFID, 2000:4).

as schooling and productive employment; this can exacerbate existing differentials in resource allocation, for example, reducing female schooling (often at already lower levels than for males) to provide extra care (Pitt & Rosenzweig, 1990). (see also Box 2, which illustrates how illness, interpreted as a curse can increase an individual's isolation and how transgressive behaviour can be interpreted as a form of madness.)

The case study below (from qualitative research in Mbale District, Uganda) shows how chronic ill-health, physical impairment and isolation can combine to drive an individual deeper into chronic poverty. Samuel considers himself to be an old man. In the North he might be expected to be in vibrant middle age.

### **Box 8: Old, sick and alone.**

In many countries Samuel would not be considered old at all. But at 54 he looks like an old man. Chronic illness and reduced mobility have reduced his ability to fend for himself. The deaths of several close family members has left him impoverished and alone.

In 1987, when he was 39, Samuel developed the first of a number of persistent health problems. He cut his leg with his hoe, and the cut became infected. It has never healed properly and his leg is now painful, swollen and heavily scarred. His reduced mobility makes it difficult for him to work. He has also developed heart disease and his chest hurts if he does any physical work, meaning that he cannot cultivate the land he owns or do any other livelihood activities.

This situation would be bad enough, if taken on its own but in 1990 his only child, a twelve year old daughter, died suddenly of a fever. His wife died in 1994, also of an undiagnosed and untreated fever. He sold 2 of his 2½ acres to cover the funeral costs for his daughter, wife and parents, who all died within a few years of each other. In a short space of time he went from being a fit healthy man with a family and a small surplus-producing farm, and to being unwell, alone and with only a marginal patch of land.

He has no close relatives in the village, but two of his nearest neighbours support him by bringing him cooked food. He does not borrow money, even for necessities, as he would be unable to pay it back, but one of his distant relatives runs a petty grocery shop in the village and he will sometimes get salt or soap from him, if he is desperate. Samuel thinks it very unlikely that his life will improve. He is highly dependent and chronically poor.

Source: Life history interview conducted by Kate Bird and Isaac Shinyekwa in Buwapuwa, Mbale District, October 2002.

## **2.5. Age.**

Age is not simply a factor that affects the distribution of resources to children; older people can also be discriminated against within the household, and live in a state of neglect (HAI, 2000)<sup>23</sup>. Old age is linked to diminishing physical strength, poor health, disability, and increased need for family support (HAI, 1999a). The capacity to earn a living and to contribute to household life is determined by one's health status, with poor health increasing older people's dependency and vulnerability (Mulindwa & Lwanga-Ntale, 2003). The resources required to care for older people directly

<sup>23</sup> The definition of old age is socially and culturally determined, and may be based on attributes other than chronological age, such as working status, physical features and grandchildren (Mulindwa & Lwanga-Ntale, 2003). It may therefore be inappropriate for a researcher to use external indicators (e.g. over 60s) to identify older people.

compete with other household resource needs, and because of household poverty, older people's health problems are often only after other individuals' needs have been met (ibid.).

The strain of caring with inadequate resources has been blamed for household abuse against older people (HAI, 1999b) including physical, psychological and sexual abuse, appropriation of pensions and property, and even witchcraft-related killings (HAI, 2001; Kibuga & Dianga, 2000)<sup>24</sup>. However, contrary to common assumption, older people are net givers not takers and make significant productive and reproductive contributions to the household (Heslop & Gorman, 2002). The work of older people is, however, often "severely undervalued, even by older people themselves" (HAI, 1999a:9). This underestimation is in part due to the fact that older people's roles require less physical energy (Mulindwa & Lwanga-Ntale, 2003 forthcoming), and also because of a decline in their social and domestic status, a partial result of modernisation (Beales, 2000); this includes older men, whose status and privilege are strongly related to their productive capacity (ibid.).

Below we see how Grace a twice-displaced widow (interviewed in Kiribairya, an internally displaced people's camp on the shore of Lake Kyoga in Kamuli District, Uganda) has been affected by the compounded losses of land and productive assets, home and household assets, husband and children, leaving her bringing up her orphaned granddaughter alone.

#### **Box 9: Displaced, widowed and vulnerable.**

Grace was widowed shortly after she and her husband escaped brutal inter-tribal violence which took place in Uganda in the mid to late 1980s. They escaped from Teso across Lake Kyoga to Kamuli District with a little money, but lost almost all their accumulated assets. With the sound of bullets coming closer they had to make stark choices between saving a cooking pot or a child.

Once in Kamuli District, her husband spent the little money they had to buy some land, but soon after he was then murdered by the land's original owners. She was driven away, and settled in Kiribairya, an internally displaced people's camp on the shore of Lake Kyoga. She has now been there for over 10 years, but twice a refugee, Grace has been able to re-accumulate very little. She lives in a simple one-roomed thatch hut, which is her only asset. She owns no land and 'even the hoes I had have been stolen.'

Grace has limited support from others. Although she had 13 children, only 4 lived beyond early childhood. Of the surviving children, the youngest daughter died some time ago of AIDS leaving 3 children. Two of these children died and Grace is now bringing up the third, a girl. She feels that she has no-one else to go to for help in the village, as there are no clan leaders or members of her tribe in the camp, and although her three surviving daughters and her son are all in the camp they rarely her any food or other support. When she is ill it is difficult for her to go to the clinic, as 'you have to go with your brother', meaning that you have to take a bribe for the doctor. She does not have anyone who will give her the money. Nevertheless she is not entirely without a support network. A young man lent her a small patch of land during the last agricultural season, on which her children helped her to cultivate sweet potatoes. An old man built her a granary next to her house, where she planned to store the potatoes. Unfortunately pests destroyed the crop, leaving her no better off than she had been before. She does not expect to be offered land again 'you are given only once, and if you are unfortunate, that is it.'

<sup>24</sup> Violence and abuse can also occur between older men and women, "reflecting a lifetime of social tension and gender inequalities" (Beales, 2000:11).



Source: Life history interview conducted by Kate Bird and Isaac Shinyekwa in Kiribairya, Kamuli District, October 2002.

## **2.6. Conclusion.**

As we have illustrated, the systematic analysis of social difference at the intra-household level has been hampered by a lack of comprehensive research tools. In the next section we critique a number of well known gender analysis frameworks for the contribution that they can make to such a tool.

## **3. Critique of Gender-Analysis Frameworks.**

The critique of unitary models of household decision-making and resource allocation has demonstrated that the household is the site of conflict and co-operation, with individuals having competing interests and needs as they attempt to maintain and change their relative social, economic and political positions within both the household and the community (Locke & Okali, 1999). This situation, which is culturally, spatially and temporally specific, can result in development interventions having unanticipated negative impacts on certain individuals or groups.

Gender-analysis, through the systematic study of the differences in the roles, responsibilities, and access to and control over resources of women and men (FHI, 2002), represents an attempt to understand the complex nature of intra-household relations for a variety of reasons - notably to either minimise the negative consequences of development and improve 'development' efficiency or to transform social relations, empowering those in subordinate positions (principally women).

Designed to help their users to integrate gender analysis into social research and planning, gender-analysis frameworks have many similarities, but differ in scope and emphasis (March *et al*, 1999). The operational need of development researchers and practitioners to simplify the complex (but not to the extent of being simplistic) requires the selection of a limited number of factors for analysis; this selection process is informed by the values, assumptions and ideological preferences of the frameworks' authors (*ibid.*). The level of simplification (in terms of concepts, tools, level of analysis, etc.) represents a significant difference between gender-analysis frameworks; however, even the more complex gender-analysis frameworks can only create a crude model of reality, due to the far more complex nature of real life (*ibid.*).

Beyond gender there are potentially numerous (culturally and time specific) axes of difference within households that affect access to and control over resources, levels of intra-household poverty, and the effectiveness of development interventions (for example: age, relationship to household head, illness, disability and incapacity, etc). The critical analysis of these intra-household differences (as opposed to descriptive documentation) has largely been ignored.

This Working Paper draws upon existing gender-analysis frameworks to suggest a set of tools and concepts that provide an analytical starting point for examining these non-gender intra-household asymmetries. Consequently, this critique of gender-

analysis frameworks is from the perspective of their applicability to analysing other dimensions of intra-household difference, not their inherent value *per se* (there is already an extensive literature critiquing various gender-analysis frameworks).

### **3.1. The Harvard Analytical Framework.**

The Harvard Framework (also known as the Gender Roles Framework or Gender Analysis Framework) is designed to demonstrate that there is an economic rationale for investing in both men *and* women. Emerging from the WID (Women in Development) ‘efficiency approach’ to development, the Framework aims to help planners design more efficient projects and improve overall productivity by increasing the understanding of men and women’s different roles in a community (March *et al*, 1999).

The Framework uses four tools. An *Activity Profile* (Table 1) identifies all relevant productive and reproductive tasks undertaken in a specific community, and indicates who does what (women/ girls or men/ boys). The Framework can be adapted to indicate the time spent on an activity and where it took place (ILO, 1998).

The *Access and Control Profile* (Table 2) identifies the resources used to carry out tasks identified in the activity profile, and indicates whether men or women have access to resources, who controls their use, and who controls the benefits of those resources (March *et al*, 1999).

**Table 1: Example of Harvard Tool 1: Activity Profile**

Activities	Women	Girls	Men	Boys
<p><b>Productive Activities</b></p> <p>Agriculture: activity 1 activity 2, etc.</p> <p>Income generating: activity 1 activity 2, etc.</p> <p>Employment: activity 1 activity 2, etc.</p> <p>Other: activity 1 activity 2, etc.</p>				
<p><b>Reproductive Activities</b></p> <p>Water related: activity 1 activity 2, etc.</p> <p>Fuel related:</p> <p>Food preparation:</p> <p>Childcare:</p> <p>Health related:</p> <p>Cleaning and repair:</p> <p>Market related:</p> <p>Other:</p>				

*Source: March et al, 1999:33 (adapted from Overholt et al, 1985).*

**Table 2: Example of Harvard Tool 2: Access and Control Profile**

	Access		Control	
	Women	Men	Access	Men
<b>Resources</b> Land: Equipment: Labour: Cash: Education/ training, etc.: Other:				
<b>Benefits</b> Outside income: Asset ownership: Basic needs (food, clothing, shelter, etc.): Education: Political power/ prestige: Other:				

Source: March et al, 1999:34 (adapted from Overholt et al, 1985).

An *Analysis of Influencing Factors* (Table 3) charts factors that influence the gender differences identified in the above two profiles, identifying opportunities and constraints on increasing women’s involvement in development projects and programmes.

**Table 3: Example of Harvard Tool 3: Influencing Factors**

Influencing Factors	Constraints	Opportunities
Community norms and social hierarchy: Demographic factors: Institutional structures: Economic factors: Political factors: Legal Parameters: Training: Attitude of community to development workers:		

Source: March et al, 1999:35 (adapted from Overholt et al, 1985).

Emphasising the need for better information to improve gender analysis, a *Checklist for Project-Cycle Analysis* (Box 10) contains a series of questions to be asked at each stage of the project cycle (identification, design, implementation, and evaluation) to enhance the effectiveness and efficiency of a project; but the Framework does not indicate what action should logically follow this data collection (March et al, 1999).

## Box 10: Example of Harvard Tool 4: Checklist

The following set of questions are the key ones for each of the four main stages in the project cycle: identification, design, implementation, evaluation.

### WOMEN'S DIMENSION IN PROJECT IDENTIFICATION

#### Assessing women's needs

1. What needs and opportunities exist for increasing women's productivity and/or production?
2. What needs and opportunities exist for increasing women's access to and control of resources?
3. What needs and opportunities exist for increasing women's access to and control of benefits?
4. How do these needs and opportunities relate to the country's other general and sectoral development needs and opportunities?
5. Have women been directly consulted in identifying such needs and opportunities?

#### Defining general project objectives

1. Are project objectives explicitly related to women's needs?
2. Do these objectives adequately reflect women's needs?
3. Have women participated in setting those objectives?
4. Have there been any earlier efforts?
5. How has the present proposal built on earlier activity?

#### Identifying possible negative effects

1. Might the project reduce women's access to or control of resources?
2. Might it adversely affect women's situation in some other way?
3. What will be the effects on women in the short and longer term?

### WOMEN'S DIMENSION IN PROJECT DESIGN

#### Project impact on women's activities

1. Which of these activities (production, reproduction and maintenance, socio-political) does the project affect?
2. Is the planned component consistent with the current gender denomination of the activity?
3. If it is planned to change women's performance of that activity (i.e. locus of activity, remunerative mode, technology, mode of activity), is this feasible, and what positive or negative effects would there be on women?
4. If it does not change it, is that a missed opportunity for women's roles in the development process?
5. How can the project design be adjusted to increase the above-mentioned positive effects, and reduce or eliminate the negative ones?

#### Project impact on women's access and control

1. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the production of goods and services?
2. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the reproduction and maintenance of human resources?
3. How will each of the project components affect women's access to and control of the resources and benefits engaged in and stemming from the socio-political functions?
4. What forces have been set into motion to induce further exploration of constraints and possible improvements?
5. How can the project design be adjusted to increase women's access to and control of resources and benefits?

### WOMEN'S DIMENSION IN PROJECT IMPLEMENTATION

#### Personnel

1. Are project personnel aware of and sympathetic towards women's needs?
2. Are women used to deliver the goods or services to women beneficiaries?
3. Do personnel have the necessary skills to provide any special inputs required by women?
4. What training techniques will be used to develop delivery systems?
5. Are there appropriate opportunities for women to participate in project management positions?

*Continued overleaf*

**Organisational structures**

1. Does the organisational form enhance women's access to resources?
2. Does the organisation have adequate power to obtain resources needed by women from other organisations?
3. Does the organisation have the institutional capability to support and protect women during the change process?

**Operations and logistics**

1. Are the organisation's delivery channels accessible to women in terms of personnel, location and timing?
2. Do control procedures exist to ensure dependable delivery of the goods and services?
3. Are there mechanisms to ensure that the project resources or benefits are not usurped by men?

**Finances**

1. Do funding mechanisms exist to ensure programme continuity?
2. Are funding levels adequate for proposed tasks?
3. Is preferential access to resources by males avoided?
4. Is it possible to trace funds for women from allocation to delivery with a fair degree of accuracy?

**Flexibility**

1. Does the project have a management information system which will allow it to detect the effects of the operation on women?
2. Does the organisation have enough flexibility to adapt its structures and operations to meet changing or new-found situations of women?

**WOMEN'S DIMENSION IN PROJECT EVALUATION****Data requirements**

1. Does the project's monitoring and evaluation system explicitly measure the project's effects on women?
2. Does it also collect data to update the Activity Analysis and the Women's Access and Control Analysis?
3. Are women involved in designating the data requirements?

**Data collection and analysis**

1. Are the data collected with sufficient frequency so that necessary project adjustments could be made during the project?
2. Are the data fed back to project personnel and beneficiaries in an understandable form and on a timely basis to allow project adjustments?
3. Are women involved in the collection and interpretation of data?
4. Are data analysed so as to provide guidance to the design of other projects?
5. Are key areas of WID/GAD research identified?

Source: March *et al*, 1999:36-38 (from Overholt *et al*, 1985)

A detailed activity profile is vital for intra-household analysis in order to identify who does what, where, when and for how long. The Harvard Framework, however, only includes productive and reproductive roles, ignoring community work that may place significant time and energy demands on individuals, and may have important implications regarding issues of access to and control over resources.

A second key ingredient of intra-household analysis is identifying who has access to resources and who controls resources, and indicating intra-household processes of competition and bargaining. However, the Harvard Framework encourages a rather simplistic 'yes/' 'no' approach to access and control, ignoring a potentially much more complex reality by hiding differing degrees of access or control, and processes of negotiation and bargaining (March *et al*, 1999).

The Framework's attempt to identify environmental opportunities and constraints through an analysis of influencing factors is useful, but it tends to treat institutions as

having a neutral role regarding gender power relations. Increasingly it is understood that this not the case, and that the ‘gendered’ nature of institutions significantly effects the outcomes of development interventions (March *et al*, 1999). It can be argued that institutional culture regarding other dimensions of difference (for example impairment and disability) will equally affect the outcomes of intervention (Berthoud *et al*, 1993).

The fourth element of the Harvard Framework, Project Cycle Analysis, is designed to assist users in examining a project proposal or an area of intervention from a gender perspective, and can be useful for enhancing the effectiveness and efficiency of development projects (it may even be possible to adapt this checklist to help improve policy design, implementation and evaluation). However, it is not particularly designed to further understanding of intra-household differences, although it may indicate the impact of interventions on intra-household resource allocations.

There are further significant limitations of the Harvard Framework in terms of both gender analysis, and its applicability to analysis of other forms of difference. The tool is static, failing to indicate changes over time, clearly undermining its effectiveness when analysing the dynamic processes of intra-household relations. The Framework emphasises the separateness rather than the connectedness and inter-relatedness of individuals and groups (consequently failing to identify issues of power distribution), with other underlying inequalities ignored; ‘men’ and ‘women’ are presented as two separate and homogeneous groups (March *et al*, 1999). Furthermore, the Harvard Framework is basically a top-down planning tool that encourages a ‘tick-the-box’ approach to data collection (March *et al*, 1999), and excludes men and women’s own analysis of their situation, (ILO, 1998). Finally, as the Framework is designed essentially to improve the efficiency of development, it may encourage development workers to only work with those who already have control (men) if it is inefficient to include those who don’t (women - for example, in areas where women have a very reduced role in production) (March *et al*, 1999).

### **3.2. The People-Oriented Planning Framework (POP).**

The Framework for People-Oriented Planning in Refugee Situations (commonly known as POP) is an adaptation of the Harvard Framework, designed to overcome some of that frameworks’ initial weaknesses. Its central purpose is to ensure an efficient and equitable distribution of resources and services in refugee situations. Three key factors are emphasised in the introduction to the POP Framework: *change*, regarding pre-disaster/ conflict roles and the potential for positive alterations to gender relations; *participation* of refugee men, women and children; and the importance of (socio-economic and demographic) *analysis* in project planning.

The POP Framework has three aspects. The *Determinants Analysis* (also called the *Refugee Population Profile and Context Analysis*) attempts to identify who the refugees are, and what their contexts are (in terms of institutional structures, general economic conditions, internal and external political events and the attitudes of the host country/ community.).

The *Activities Analysis* (Table 4) is similar to the Harvard Framework's Activity Profile, and enables the user to identify who does what, when and where. Because the gender division of labour and roles are disrupted by flight, it is essential to find out what men and women were doing before they became, and what they are doing now or are able to do (March *et al*, 1999).

**Table 4: Example of POP Tool 2: Activities Analysis**

Activities	Who?	Where?	When?/ How long?	Resources used
<b>Production of goods...</b> e.g. carpentry metal work <b>... and services</b> e.g. teaching domestic labour  <b>Agriculture</b> e.g. land clearance planting care of livestock  <b>Household production</b> e.g. childcare home garden water collection  <b>Protection activities</b> e.g. of unaccompanied children single women elderly people  <b>Social, political, religious activities</b> e.g. community meeting ceremonies				

Source: March *et al*, 1999:46 (adapted from Anderson *et al*, 1992).

Similar to the Harvard Framework's Access and Control Profile, the third tool, a *Use and Control of Resources Analysis* (Table 5) helps to determine how resources are distributed, and who has say over their use. The tool, using an expanded concept of resources, including skills and knowledge, analyses what resources people (divided by age and gender) have lost, what resources they have brought with them, and what resources must be provided.



**Table 5: Example of POP Tool 3: Use of Resource Analysis**

<b>Resource lost due to flight</b>	<b>Who used this (gender/ age)</b>	<b>Who controlled this (gender/ age)</b>
Land: Livestock: Shelter: Tools: Education system: Healthcare: Income:		
<b>Resource brought by refugees</b>	<b>Who uses this (gender/age)</b>	<b>Who controls this (gender/age)</b>
Skills: e.g. political manufacturing carpentry sewing cleaning agricultural animal husbandry  Knowledge: e.g. literacy teaching medicine/ health		
<b>Resources provided to refugees</b>	<b>To whom is this provided (gender/ age)</b>	<b>How/ where/ when is it provided (through males? Female? Adults?)</b>
Food: Shelter: Clothing: Education: Legal services: Healthcare services: Etc.		

Source: March *et al*, 1999:47 (from Anderson *et al*, 1992).

Many of the criticisms of the Harvard Framework are equally valid for the POP Framework (March *et al*, 1999). Notably, POP does not address the culture and contexts of institutions that determine the allocation of resources; it emphasises separation rather than the connectedness and inter-relatedness of men and women; it ignores other underlying inequalities; and fails to specify the importance of women and men’s analysis of their own situation. The POP Framework also works best with homogeneous groups, while questions of who has control in a community cannot be adequately answered within a refugee setting where control over most aspects of social life is assumed by external actors (March *et al*, 1999).

Importantly, however, the Framework provides a more detailed activities analysis than that provided by the Harvard Framework; with an increased range of activities

(including social, political and religious activities, and protection activities<sup>25</sup>) it also asks for detailed assessments of who, when, where, how long and resources used. Furthermore, the analysis of the use and control of resources includes more intangible resources (such as skills, knowledge and time) and, critically, introduces the concept of change over time, with resources lost, maintained and altered.

### 3.3. The Moser Framework.

The Moser Framework forms part of the GAD (Gender and Development) critique of the WID approach to development, and argues for an integrated gender-planning perspective in all development work, concentrating on the power relations between men and women (Moser, 1993). The Framework attempts to establish 'gender planning' as a type of planning in its own right, and questions the assumption that planning is a purely technical task (March *et al*, 1999).

The Moser Framework uses six principles, tools and procedures. (These are all presented in summary form in Table 7, below.) The first, the *Gender roles identification/ triple role* tool maps the gender division of labour. Moser identifies a 'triple role' for low-income women involving reproductive, productive and community-management activities (primarily an extension of women's reproductive role), compared to men's largely dual role of productive and community-politics activities (organised, formal politics, often within the framework of national politics). The recognition of women's triple role – with the aim of ensuring that tasks are equally valued - highlights work (community-management) that is often ignored in economic analysis.

The second, *Gender needs assessment*, (Table 6) is based on the concept that women (as a group) have particular needs that differ from men (as a group) as a consequence of both women's triple role, and their subordinate position to men in most societies. *Practical gender needs* (PGNs) are a response to immediate perceived necessities identified within a specific context, and are largely practical in nature (for example, water provision, healthcare, etc.); their fulfilment will not challenge the existing gender division of labour or women's subordinate position in society (ILO, 1998). *Strategic gender needs* (SGNs) are those that exist because of women's subordinate social position, and are related to gender divisions of labour, power and control (ibid.). If met, SGNs would enable women to transform existing imbalances of power between men and women (for example, removal of institutionalised forms of discrimination, measures against male violence, etc.) (March *et al*, 1999).

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<sup>25</sup> The concept of protection identifies the need of vulnerable groups for protection (of a legal, physical or social nature), and demonstrates that such protection should be considered as an activity which someone has to provide; it is important to identify what protection gaps there are in the current situation (March, 1999).

**Table 6: Example of Moser Tool 2: Gender Needs Assessment**

Women's practical gender needs	Women's strategic gender needs
<ul style="list-style-type: none"><li>• Access to seedlings</li><li>• Firewood</li><li>• Needs related to reforestation and forestry activities</li><li>• Improved ovens</li><li>• Marketing of rattan products</li><li>• Specific training</li><li>• Paid work</li></ul>	<ul style="list-style-type: none"><li>• Collective organisation</li><li>• Right to speak out</li><li>• Skills in leadership, and leadership positions in the project and community</li><li>• Education</li></ul>

Source: March et al, 1999:61.

The third tool involves *Disaggregating control of resources and decision-making within the household*, this links intra-household allocation of resources with the bargaining processes which determine this (March et al, 1999) (see Table 7). The tool asks who has control over what resources within the household, and who has what power of decision-making?

The fourth tool, *Planning for balancing the triple role* encourages planners to examine whether a planned programme or project will increase a woman's workload in one of her roles, to the detriment of the others (see Table 7).

The fifth tool is mainly used for evaluation of existing programmes and projects (although it can be used to consider the most suitable approach for future work), and involves *Distinguishing between different aims in interventions: the WID/ GAD policy matrix* (for summary, see Table 7). The matrix encourages users to examine how different planning approaches meet the practical and/ or strategic needs of women. Moser identifies five different types of policy approach that have dominated development planning over the last few decades: *welfare, equity, anti-poverty, efficiency, and empowerment*.

The final tool requires *Involving women, and gender-aware organisations and planners, in planning*, which is essential to ensure that real practical and strategic gender needs are identified and incorporated into the planning process (Mach, 1999) (see Table 7).

Because the Moser Framework aims to establish gender planning as a form of planning in its own right, it strongly emphasises planning issues (i.e. planning for balancing the triple role; distinguishing between different aims in intervention; and involving women, and gender-aware organisations and planners, in planning). Consequently, a significant portion of the Framework is not directly concerned with increasing understanding of intra-household differences, but rather focuses on promoting gender awareness/ understanding within development organisations, and women's involvement in planning (equally, therefore, those same aspects are not directly applicable to understanding non-gender aspects of intra-household difference). This does not mean that promoting gender awareness, etc. at planning level cannot have an indirect affect on understandings of intra-household differentiation and can have (potentially) empowering effects. In fact, these tools may be useful with regard to analysing and improving planned interventions that are

designed to tackle other aspects of intra-household difference and power imbalances; for example, promoting the involvement of older or disabled people in project and policy planning, or improving the disability or age-awareness of personnel.

When analysing other aspects of intra-household difference, the concept of women's triple role is significant; it makes visible all areas of work, it helps promote fair valuing of tasks, and it reminds planners that productive, reproductive and community work are inter-related (altering one impacts on the others) (March *et al*, 1999). The concepts of practical and strategic gender needs are also valuable; distinguishing between needs of immediate necessity, and those that, if met, will challenge an individual's subordinate position within the household, and society.

There are, however, limitations to these potentially important tools. As with the Harvard and POP Frameworks, the Moser Framework fails to address the subtleties of the relationship *between* men and women, and how this changes, along with their activities, over time (Locke & Okali, 1999). In fact, the Moser Framework ignores men as 'gendered' beings (March *et al*, 1999). Furthermore, the division between practical and strategic needs is artificial, and some find it unhelpful (Longwe, 1994). Finally, change over time is not examined as a variable (March *et al*, 1999), which downplays the dynamism of intra-household relations.

**Table 7: Moser Gender Planning Principles, Tools and Procedures**

No.	Principles	Tool	Procedures	Techniques	Purpose
1.	Gender roles	Gender roles identification	Gender diagnosis, objectives and monitoring	Identification of productive/ reproductive/ community management/ community politics roles of men and women and equal allocation of resources for work done in these roles	To ensure equal value for women and men's work within the existing gender division of labour
2.	Gender needs	Gender needs assessment		Assessment of different practical and strategic gender needs	To assess those needs relating to male-female subordination
3.	Equal intra-household resource allocation	Disaggregated data at the household level		Gender disaggregated data	To ensure identification of control over resources and power of decision-making within the household
4.	Balancing of roles	Inter-sectorally linked planning	Gender entry strategy	Mechanisms for inter-sectoral linkages between economic, social, spatial, development planning	To ensure better balancing of tasks within the existing gender division of labour
5.	Relationship between roles and needs	WID/ GAD policy matrix		Range of policy approaches: welfare; equity; anti-poverty; efficiency; empowerment	Performance indicator to measure how far interventions reach practical gender needs and strategic gender needs
6.	Equal control over decision-making in the political/ planning domain	Gender participatory planning		Gender consultation and participation	Mechanisms to incorporate women and representative gender-aware organisations into the planning process

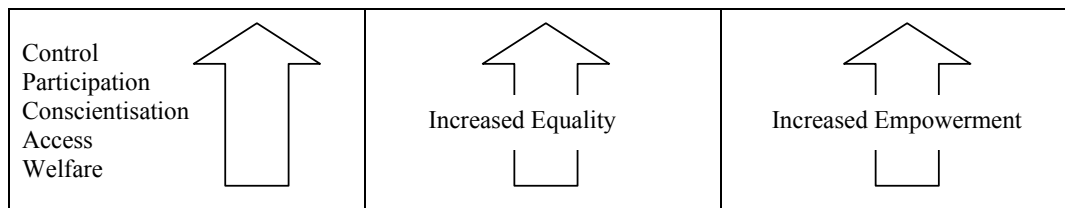
Source: Moser, 1993:92-93

### 3.4. Women’s Empowerment (Longwe) Framework.

The Longwe Framework is intended to help planners question what women’s empowerment and equality means in practice, and to assess critically the extent to which a development is supporting this empowerment (King, 2001). The ultimate aim of this Framework is to achieve women’s empowerment by enabling women to achieve equal control over the factors of production and participate equally in the development process alongside men (ILO, 1998).

The Longwe Framework identifies five *Levels of equality* (Table 8), which indicate the extent to which women are equal with men, and have achieved empowerment: *Welfare, Access, Conscientisation, Participation* and *Control*. These levels are hierarchical (with Control at the top); if an intervention focuses on the higher levels, the empowering affect is likely to be greater than if it focuses on the lower levels – welfare interventions are unlikely to be found empowering by women. Critically, an ideal intervention does not necessarily show activities on every level (March *et al*, 1999).

**Table 8: Example of Women’s Empowerment (Longwe) Tool 1: Levels of Equality**



*Adapted from March et al, 1999:93.*

The second dimension of the Framework is the *Level of recognition of ‘women’s issues’* (Table 9) – an issue becomes a ‘women’s issue’ when it looks at the relationship between women and men, rather than simply at women’s traditional and subordinate sex-stereotyped gender roles (March *et al*, 1999). This tool goes beyond assessing the levels of women’s empowerment that an intervention seeks to address, to identify the extent to which project objectives are concerned with women’s development, and to establish whether women’s issues are ignored or recognised. Longwe identifies three levels of recognition of women in project design: *Negative level*, the project objectives make no mention of women’s issues; *Neutral level*, project objectives recognise women’s issues, and aim to ensure that the project does not leave women worse off; and *Positive level*, the project objectives are positively concerned with women’s issues, and with improving the position of women relative to men (ILO, 1998).

**Table 9: Example of Women’s Empowerment (Longwe) Tool 1 & 2: Levels of Equality/ Levels of Recognition**

Project title:			
<b>Levels of Recognition</b>	<b>Negative</b>	<b>Neutral</b>	<b>Positive</b>
<b>Levels of Equality</b>			
Control			
Participation			
Conscientisation			
Access			
Welfare			

Source: March *et al*, 1999:95.

This Framework is geared primarily toward improving planning, monitoring and evaluation, so has limited direct applicability to enhancing understanding of non-gender aspects of intra-household difference (although improved planning can contribute indirectly to this understanding); however, the framework still raises some useful issues. The Framework develops the concept of practical and strategic gender needs into a progressive hierarchy, which depends on the extent to which an intervention has potential to ‘empower’; and emphasises that empowerment is intrinsic to development (ILO, 1998). The Framework is also useful in identifying the gap between rhetoric and reality in interventions (King, 2001).

There are, however, serious limitations to the Longwe Framework. It is static, ignoring changes over time; it fails to examine the institutions and organisations involved or the macro-environment; and it ignores other forms of inequality (encouraging the view of women as a homogeneous group) (March *et al*, 1999). Furthermore, it examines the relationship between women and men only in terms of inequality, ignoring the complicated system of rights, claims and responsibilities that exist between them (March *et al*, 1999). In fact, by defining development only in terms of women’s empowerment, it can tempt users to focus only on women rather than on gender relations or other forms of social difference. Finally, the hierarchy of levels may be misleading: it may encourage the perception that empowerment is a linear process; it fails to allow for relative importance of different resources; and it does not help to differentiate between marginally different impacts.

### **3.5. The Social Relations Approach.**

Originating from a socialist feminist background, and developed by Naila Kabeer, the Social Relations Approach is a method for analysing gender inequalities regarding the distribution of resources, responsibilities and power, and for designing policies and programmes which enable women to be agents of their own development (March *et al*, 1999). Unlike the previous frameworks, this approach uses concepts rather than tools to analyse the relevant issues.

Kabeer presents *Development as increasing human well-being*, which concerns survival, security and autonomy<sup>26</sup> (Kabeer, 1994). This shifts assessment of development interventions from only considering technical efficiency, to considering how well they contribute to the broader goals of survival, security and autonomy. This shift expands the concept of production beyond market production to include all activities that contribute to improved well-being (including care of the environment, caring for the sick, nurturing, etc). By expanding the concept of production, Kabeer forcefully challenges the undervaluing of non-market activities that occurs in some frameworks.

The second concept is that of *Social relations*, which are the (dynamic) structural relationships that create and reproduce systemic differences in the positioning of different groups of people, and determine our roles, responsibilities, claims, resources, and level of control over our own and others' lives (King, 2001). Producing cross-cutting inequalities which position each individual within the structure and hierarchy of society, social relations are altered by macro level changes and human action (March *et al*, 1999). According to Kabeer (1994), poverty arises out of people's unequal social relations, which dictate unequal relations to resources, claims and responsibilities. It is also through social relations (for example, networks of family and friends) that many poor people survive. Consequently, this Approach argues that development interventions should support relationships that build on solidarity and reciprocity, and build autonomy, rather than reduce it (March *et al*, 1999).

Recognising that inequality is not simply confined to the household but is reproduced across a range of institutions at macro level, the Social Relations Approach introduces the concept of *Institutional Analysis*<sup>27</sup> (Table 10 and Fig 2). Identifying four key institutional locations (the *state*, the *market*, the *community*, and *family/ kinship*), Kabeer challenges the ideological neutrality and independence of institutions, arguing that they produce, reinforce and reproduce social difference and inequality, that they are inter-related, and that changes in one will cause changes in the others. Although institutions differ in many ways, the Approach identifies five common aspects that are distinct but inter-related. By examining institutions on the basis of their *Rules* (how things get done), *Activities* (what is done?), *Resources* (what is used, what is produced?), *People* (who is in, who is out, who does what?) and *Power* (who decides, and whose interests are served?) users can understand who does what, who gains, who loses (which men and which women) (March *et al*, 1999). These five categories can be simplified to only three: rules, practices, and power (which is manifested through the rules and practices) (March *et al*, 1999).

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<sup>26</sup> In this usage, autonomy means “the ability to participate fully in those decisions that shape one’s choices and one’s life chances, at both the personal and collective level” (March *et al*, 1999:103).

<sup>27</sup> *Institutions* ensure the production, reinforcement, and reproduction of social relations and thereby create and perpetuate social difference and social inequality. Conversely, *organisations* are the specific structural forms that institutions take (March *et al*, 1999).

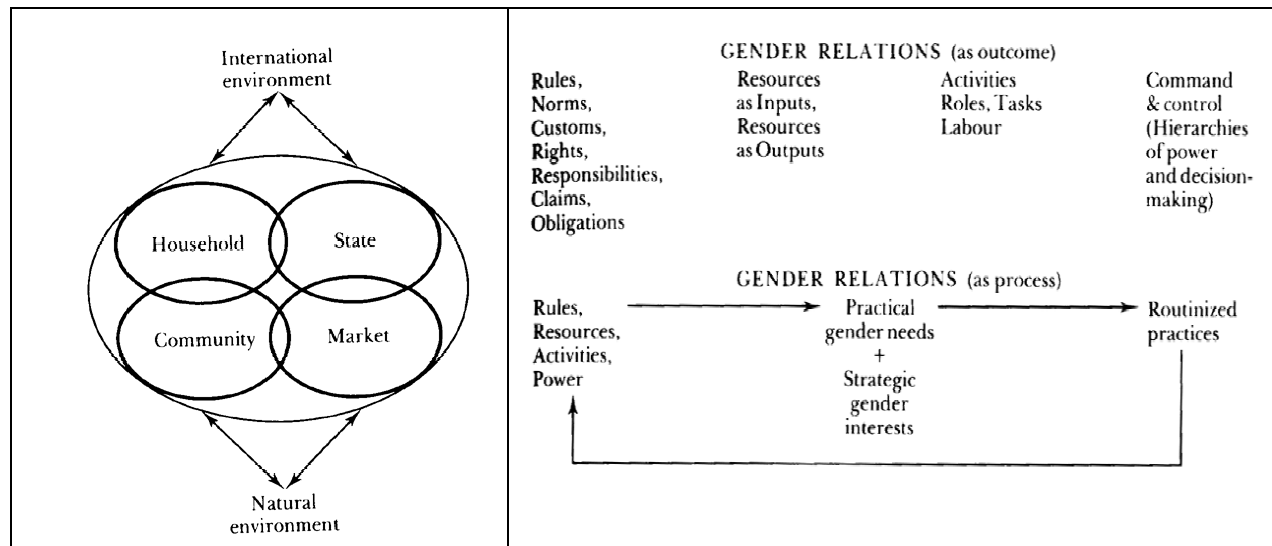


**Table 10: The Social Relations Approach: Concept 3: Institutional Analysis – key institutional locations and organisational/ structural form**

Key institutional locations	Organisational/ structural form
State	Legal, military, administrative organisations
Market	Firms, financial corporations, farming enterprises, multinationals, etc.
Community	Village tribunals, voluntary associations, informal networks, patron-client relationships, NGOs
Family/ kinship	Household, extended families, lineage groupings, etc.

Source: March et al, 1999:104.

**Fig. 2: The Social Relations Approach: Concept 3: Institutional Analysis – the key, inter-related institutions, and the construction of gender relations as an outcome and process**



Adapted from Kabeer, 1994.

The fourth concept, *Institutional gender policies* examines the degree to which policies recognise and address gender issues. *Gender-blind* policies recognise no distinction between the sexes and are often implicitly male-biased. *Gender-aware* policies recognise that men and women are development actors, who are constrained in different, often unequal, ways as potential participants and beneficiaries in the development process (March et al, 1999). There are three types of gender-aware policies (which are not mutually exclusive). *Gender-neutral* policies, which intend to leave the existing distribution of resources and responsibilities unchanged. *Gender-specific* policies, which intend to meet targeted (practical) needs of women and men within the existing distribution of resources and responsibilities. *Gender-redistributive* policies, which intend to transform existing distributions to create more balanced relationships between men and women.

The Approach also explores the *Immediate, underlying and structural factors* that cause the problems, and their effects on the various actors involved. Each of the three factors can be analysed in relation to the four types of institutions (King, 2001).

The Social Relations Approach gives a holistic and dynamic analysis of poverty, which highlights the *relationships* between groups, emphasises women and men's different interests and needs, and links each level of analysis (household, community, market and state) to each other. Furthermore, the institutional analysis offers a way of understanding how institutions inter-relate, and how they can produce reinforce and change social relations and inequalities. This concept is of significant value when analysing other aspects of household difference, which are affected by the rules, practices and power of institutions (for example, impairment/ disability or age). Finally, the concept of institutional gender policies, and the differing degrees to which policies recognise gender issues, provides a potential framework through which to examine the extent to which policies recognise other forms of inequality and subordination.

The holistic nature of the Approach can, however, be a limitation. Analysis can seem “complicated, detailed, and demanding” (March et al, 1999:118), and requires a very detailed knowledge of the context; it is also difficult to use with communities in a participatory way because of the complex concepts (e.g. institutions and organisations). Furthermore, it difficult to determine what an institution is, particularly as they do not have definite boundaries.

### **3.6. Capacities and Vulnerabilities Analysis Framework.**

As with the POP Framework, the Capabilities and Vulnerabilities Analysis (CVA) was designed specifically for use in humanitarian interventions and disaster preparedness. Based on the idea that people's existing strengths (capacities<sup>28</sup>) and weaknesses (vulnerabilities<sup>29</sup>) determine the impact that a crisis has on them, and how they respond to it, the CVA aims to help humanitarian interventions meet immediate needs, and simultaneously build on the strengths of people and their efforts to achieve long-term social and economic development (March *et al*, 1999).

The CVA distinguishes between three *Categories of capacities and vulnerabilities*, using an analysis matrix: *physical*, *social* and *motivational* capacities and vulnerabilities (Table 11). Despite suffering material deprivation during crisis, women and men will always have some resources left (to differing degrees and possibly different resources), including skills and possibly goods; it is important to build on these capacities. Decision-making in social groups (including households and the wider community) can exclude certain groups (for example, women), which can increase their vulnerability. Cultural and psychological factors also affect people's vulnerability; inappropriate interventions that do not build on people's own abilities, develop their confidence or offer them opportunities for change, may make people

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<sup>28</sup> Capacities are related to people's material, physical and social resources, and their beliefs and attitudes (March *et al*, 1999).

<sup>29</sup> Vulnerabilities are the long-term factors that make people more susceptible to disasters or drawn-out emergencies, and weaken their ability to cope. Vulnerabilities exist before disasters, contribute to the severity, make effective disaster response harder, and continue after the disaster (March *et al*, 1999).

feel victimised and dependent, and promote passivity and fatalism (March *et al*, 1999).

**Table 11: Example of CVA Tool 1: Analysis Matrix**

	<b>Vulnerabilities</b>	<b>Capacities</b>
<b>Physical/ material</b> What productive resources, skills and hazards exist		
<b>Social/ organisational</b> What are the relationships between people? What are their organisational structures?		
<b>Motivational/ attitudinal</b> How does the community view its ability to change?		
“Development is the process by which vulnerabilities are reduced and capacities increased”.		

Source: March *et al*, 1999:81 (from Anderson & Woodrow, 1989).

To make the CVA matrix reflect the complexity of reality, five *Additional dimensions of ‘complex reality’* must be added to the analysis (Table 12 and Table 13). These additional dimensions involve disaggregation of communities by gender; disaggregation according to other dimensions of social relations (wealth, political affiliation, ethnic/ language group, age, etc.); change over time; interactions/ impact between categories of analysis; and analysis at different scales and levels of society.

**Table 12: Example of CVA Tool 2: Matrix disaggregated by gender**

	Vulnerabilities		Capacities	
	Women	Men	Women	Men
<b>Physical/ material</b>				
<b>Social/ organisational</b>				
<b>Motivational/ attitudinal</b>				

*Source: March et al, 1999:82 (from Anderson & Woodrow, 1989).*

**Table 13: Example of CVA Tool 2: Matrix disaggregated by wealth ranking**

	Vulnerabilities			Capacities		
	Rich	Non-poor	Poor	Rich	Non-poor	Poor
<b>Physical/ material</b>						
<b>Social/ organisational</b>						
<b>Motivational/ attitudinal</b>						

*Adapted from March et al, 1999:82 (from Anderson & Woodrow, 1989).*

As the CVA is confined to humanitarian situations and disaster preparedness, and is aimed at (homogeneous) group not intra-household analysis, there is little point in critiquing it here. However, the tool provides a useful concept to consider when analysing intra-household difference: all individuals have vulnerabilities *and* capacities (including psychological ones) that change over time, and may affect people's responses or ability to respond to changes within the household (as a consequence of development interventions). This concept may be particularly useful when analysing how certain events, such as illness, alter an individual's capacities and vulnerabilities, and consequently affects their position, role(s) and power and control within the household. To have significant practical value for analysing dimensions of intra-household difference, this tool would have to focus more explicitly on change over time, with capabilities and vulnerabilities lost, maintained and altered, as similarly occurs in the POP Framework's use of resources analysis.

### **3.7. Concluding Comments on Gender Analytical Frameworks.**

When considering the use of existing gender analytical frameworks to examine other dimensions of intra-household difference, there is one overarching problem. These frameworks are designed primarily to consider one axis of difference (gender), and a framework that focused only on one dimension of difference would tend to hide or ignore other dimensions of difference. A framework designed to analyse other dimensions of difference would want to examine multiple axes of difference simultaneously (age, relationship to household head, impairment, etc.). As an individual would fit into multiple categories, such an approach is likely to produce inaccurate or misleading data. It could be possible to employ a number of frameworks, each of which examines a specific axis of difference. However, this would be complicated and time consuming, would generate vast amounts of data. In all likelihood it would lead to similar problems of potentially misleading information. Using a number of frameworks to examine specific forms of social difference separately would encourage artificial disaggregation. This could encourage researchers to over- or under-emphasise certain dimensions of difference, and would critically ignore the fact that individuals are composites of all their capabilities and vulnerabilities (for example, the *combination* of a person's age, gender, relationship to the household head and disability would, within the specific socio-cultural environment, affect their level of poverty). Attempts to assign cause and effect to individual dimensions of difference would require massive resource and time commitments which would be, in all likelihood, prohibitive. Furthermore, the necessary level of complexity needed to demonstrate these individual causes and effects would, again in all likelihood, prevent practical policy recommendations.

## **4. The Intrahousehold Disadvantages Framework.**

### **4.1. Introduction.**

The Intrahousehold disadvantages framework provides a tool for the analysis of intrahousehold dimensions of disadvantage.

In this section of the paper, having examined existing gender analytical frameworks, we suggest a set of tools and concepts which build on gender analysis and which we believe will help provide an analytical starting point from which to examine other forms of intra-household difference and disadvantage. Hopefully this framework will further encourage the critical analysis of intra-household relations, decision-making and resource allocation, and ultimately feed into improved policy, programme and project planning.

### **4.2. The Framework.**

Attempts to establish a framework that examines multiple dimensions of difference risk producing distorted data and information overload, with impractical resource

demands. In an attempt to avoid these problems, this Paper presents a two-tier framework that examines locally identified “clusters of disadvantage” that affect individuals within the community, aggravating their personal level of poverty and vulnerability. The purpose of the two tiers is to minimise the resource demands of the research, while providing practical, detailed and relevant information. They will also help locate intra-household inequality within the wider socio-economic context.

The first tier will involve analysis at the community level, through participatory techniques, to identify clusters of disadvantage that, generally within the community, characterise the cause of the most severe poverty. Continuing at the community level, both a detailed 24 hour activity, access and control profiles of individuals characterised by specific clusters of disadvantage, and a more general one, will be conducted, identifying what people do despite their disadvantages. An institutional analysis should then be conducted to identify how institutions and organisations produce, reinforce and reproduce social difference and disadvantage. Finally at the community level, a practical and strategic needs analysis is required.

The second tier will provide more detailed case studies of two or three individuals (and their households) who are characterised by each of the clusters of difference/disadvantage that were identified at the community level. Initially, activity, access and control profiles similar to those used at community level will be conducted for all household members. Finally, a vulnerabilities and capabilities analysis of the individual characterised by a cluster of disadvantage will be completed. This second tier of analysis will help triangulate information gathered at the community level, and will provide vital information on how individuals with disadvantages are discriminated against within the household. Box 2 presents an outline of the proposed framework, and is followed by a more detailed description of the framework.

### **Box 11: The Intra-household Disadvantages Framework**

#### ***Tier 1: Community Level Analysis***

- *Tool 1:* Participatory exercise to identify “clusters of disadvantage”.
- *Tool 2:* (Detailed 24 hour and general) Activity, Access and Control Profiles of individuals characterised by a cluster of disadvantage.
- *Tool 3:* Institutional Analysis.
- *Tool 4:* Practical and Strategic Needs Analysis.

#### ***Tier 2: Intra-household Level Analysis (Case studies)***

- *Tool 1:* (Detailed 24 hour and general) Activity, Access and Control Profiles of all household members.
- *Tool 2:* Vulnerabilities and Capabilities Analysis of individual characterised by a cluster of disadvantage.

### **4.3. Community Level Analysis.**

This tier of analysis is designed to identify various clusters of disadvantage that exist within the community, to examine what individuals continue to do, and with what,

despite their disadvantages, to locate their disadvantage and discrimination in the wider socio-economic context, and to identify their practical and strategic needs.

#### **4.3.1. Tool 1: Participatory exercises to identify “clusters of disadvantage”.**

The first stage in the examination of intra-household differentiation is based on identifying forms of disadvantage. These are clustered and scored, with scoring reflecting perceived severity of disadvantage. Scoring is generated during community level participatory exercises and will be locationally and temporally specific.

A focus group should be used for this exercise<sup>30</sup>. The group should be relatively small (6-10 members) and should be composed of a cross-section of the village/ community. It should include well-informed members of the community, who know the village/ community well.

The exercise should follow a wealth-ranking exercise undertaken in private with key informants<sup>31</sup>. The wealth ranking exercise should have been based on a comprehensive listing of all households in the village/ community. The process of undertaking a wealth-ranking will have focused the minds of the focus group on the forms of disadvantage experienced by different households in the village. This can then be extended to the sub- or intra-household level.

The focus group is asked to list problems that commonly cause suffering within their community (forms of disadvantage). For example:

- Widows/ widowers
- Divorcees/ abandoned women
- Abandoned/ frail elderly
- Long-term sick
- Children or adults with mental or physical impairments
- Infertile women
- Orphans/ abandoned children/ adopted or fostered children/ relatives living in the compound of others (e.g. cousins acting as servants or manual labour for their rich relatives)
- Non-favoured/ second or third (etc.) wife in a polygamous setting
- Children of non-favoured/ second or third (etc.) wife

Explaining this exercise will probably take 10-20 minutes of discussion and classification with the group. The researcher should avoid mentioning any specific forms of disadvantage, as this will bias the discussions of the focus group.

When the exercise is undertaken, some of the forms of disadvantage identified are likely to be based on socio-cultural or socio-economic difference. E.g. ethno-linguistic difference, caste, class or livelihood group, migrant or refugee households

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<sup>30</sup> Selecting the composition of the focus group will have to be done with great care. Even well informed members of the community might not remember to think of disabled people as they are often not active and visible members of the community (Rebecca Yeo, pers comm, 2003)

<sup>31</sup> The wealth ranking is undertaken in this way, rather than with the whole village or community, due to the problems that such processes can cause, for example feelings of unease, violation and shame; arguments and physical fights.

etc. As the purpose of this research tool is to assess disadvantage at the intrahousehold level other forms of social difference should be noted for later exploration. However, it would be useful for the researcher to understand the relative importance of extra-household and intra-household differences. This could be discussed with a small group of key informants.

Once a list of disadvantages has been produced, the focus group members should be asked to identify clusters of intrahousehold disadvantage that exist within their community. For example:

- Young widow/ abandoned/ divorced wife, with school age children, with assets/ stripped of assets
- Older widow/ abandoned/ divorced wife, with adult children, with assets/ stripped of assets
- Older widow/ abandoned/ divorced wife, adult children dead, caring for grandchildren, with assets/ stripped of assets
- Long-term sick head of household, with assets/ has sold or lost assets
- Long-term sick third daughter
- Long-term sick favoured 2<sup>nd</sup> wife of poor household which has sold/ lost assets
- Long-term sick/ frail/ disabled older head of household with assets/ who has sold or lost assets
- Long-term sick/ frail/ disabled abandoned older person with assets/ who has sold or lost assets
- Physically/ sensorily/ intellectually/ behaviourally impaired head of household
- Physically/ sensorily/ intellectually/ behaviourally impaired 2<sup>nd</sup>/ non-favoured wife
- Physically/ sensorily/ intellectually/ behaviourally impaired child of non-favoured wife

Once again, the researcher must avoid forming the clusters, which should be produced solely by the focus group. Once they have been produced the focus group should be encouraged to score each cluster from 1 – 10, with the high score indicating a high degree of disadvantage and a low score indicating a low degree of disadvantage<sup>32</sup>. Particularly if time is limited, subsequent research will focus on the higher scoring clusters of disadvantage.

In order to identify individuals for in-depth interviewing, the lists produced for the wealth ranking exercise should be added to with information on households containing disadvantaged people. Facilitators should attempt to generate as much detail as possible (the detail possible will depend on time available, knowledge of key-informants, size of village, taboos etc.). To do this may require gathering the members of the focus group for more than one meeting.

#### **4.3.2. Tool 2: Activity, Access and Control Profile.**

Once the community has identified and scored the clusters of disadvantage that exist within the community, an Activity, Access and Control Profile should be conducted to

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<sup>32</sup> This can be done using the standard PRA techniques where each person is given +/- 20 seeds and asked to allocate them to the 'disadvantages' that they think are the most serious



identify what individuals do, and with what, despite their cluster of disadvantage. Based on the People-Oriented Planning Activity Profile, this tool also includes an analysis of individuals' access to and control over resources. The reason these two dimensions have not been separated, as is the case with several gender frameworks, is that the combined tool should provide a more dynamic indication of the complex reality, by avoiding a simplistic 'yes'/'no' approach to resource and control issues.

To provide both a detailed examination of individuals' activities and a general overview, two profiles should be completed. Both profiles should identify what activities an individual undertakes; where that activity occurs; when they do it and how long it takes; what resources are used, when and for how long; who controls the resource/ who must they negotiate with to access the necessary resource; what benefits are produced; and who controls the benefits. The first profile (Table 14) should map an average 24 hours, highlighting work and leisure time, while identifying detailed, specific activities (e.g. water collection, firewood collection, etc.). The second profile (Table 15) should map activities over the last 12 months, identifying individual's general productive, reproductive and community activities.



**Table 14: Example of Tool 2: Activity, Access and Control Profile (24 hour profile –example of a frail older widow with adult children).**

Activities	Where	When?/ How long?	Resources used	When/how long resources used?	Who controls resource?/ who do you need to negotiate with?	Benefits produced	Who controls the benefits?
Food provision (preparation & cooking).	Household.	3 hours/ day.	1. Firewood. 2. Water. 3. Food ingredients. 4. Cooking utensils. 5. Physical energy.	Dependent on food intake.	1&2. Collected by grandchildren. 3. Bought by daughter- in-law. 4. Daughter-in-law. 5. Older woman (?).	<ul style="list-style-type: none"> <li>• Frees-up daughter- in-law's time for other activities.</li> <li>• Maintains and builds human capital of the household.</li> </ul>	<ul style="list-style-type: none"> <li>• Daughter-in-law</li> <li>• Various</li> </ul>
Protection of children.	Household.	Continuous.	Physical presence (supervision)	Ongoing.	Older woman.	Maintained human capital.	Various
Caring for sick household members.	Household.	Ongoing.	Knowledge. Medicine.	Ongoing. When available.	Older woman. Adult son.	<ul style="list-style-type: none"> <li>• Maintenance of human capital.</li> <li>• Restoration of productive/ reproductive capacity of sick individual.</li> </ul>	Various. Various.
Teaching children traditional values & customs.	Household.	Continuous.	Knowledge.	Ongoing.	Older woman.	<ul style="list-style-type: none"> <li>• Socialisation of children.</li> <li>• Maintenance of tradition.</li> <li>• Improved human capital.</li> </ul>	(?) (?) Various.
Sewing.	Household.	½ an hour/ day.	Sewing machine.	Borrowed when daughter-in-law is busy doing other activities.	Daughter-in-law.	Limited cash income.	Divided between the older woman and the daughter- in-law.
Socialising	Household/ village.	When time is available/when tasks can overlap.	Social capital (and sometimes surplus food and beverages).	Occasional.	Dependent on sufficient time. (and sometimes surplus food and beverages).	Maintaining social capital	Various.

**Table 15: Example of Tool 2: Activity, Access and Control Profile (profile of the last 12 months – frail older widow with adult children).**

Activities	Where	When?/ How long?	Resources used	When/how long resources used?	Who controls resource?/ who do you need to negotiate with?	Benefits produced	Who controls the benefits?
<b>Productive Activities</b>							
Sewing:	Household.	Several hours a week.	Daughter-in-law's sewing machine.	When daughter-in-law is busy doing other activities.	Daughter-in-law.	Limited cash income.	Divided between the older woman and the daughter-in-law.
Collection of old age pension:	Local post office.	Weekly, 2-3 hours including travelling.	Time Money for public transport.	1 to 1.5 hours each way.	Adult son provides cash for transport	Pensions provides major income source for household.	Adult son appropriates pension.
<b>Reproductive Activities</b>							
Childcare, including provision of food:	Household.	Daily.	1. Time 2. Cooking utensils. 3. Food ingredients. 4. Firewood & water. 5. Physical energy.	all on-going. 5. Dependent on food-intake.	1. Daughter-in-law. 2&3. Bought by daughter-in-law. 4. Collected by grandchildren. 5. Older woman (?)	<ul style="list-style-type: none"> <li>Protected children.</li> <li>Improved human capital.</li> <li>Frees-up daughter-in-law's time for other (productive) activities.</li> </ul>	Various. Various. Daughter-in-law.
Teaching children traditional values & customs:	Household.	Ongoing.	Knowledge.	Ongoing.	Older woman.	<ul style="list-style-type: none"> <li>Socialisation of children.</li> <li>Maintenance of tradition.</li> </ul>	(?) (?)
<b>Community Activities</b>							
Community meetings/ development projects:	Village.	Several hours, weekly/ monthly.	Social capital, time, sometimes food & beverages	Ongoing. During meetings..	Daughter-in-law caring for children.	<ul style="list-style-type: none"> <li>Maintained social networks.</li> <li>New productive and reproductive opportunities.</li> </ul>	Various. Various.
Ceremonies:	Village.	Occasional.	Social capital. Time.	Ongoing.	Alternative childcare arrangements	Maintained social networks; social safety nets; and status.	Various.
Custodianship of cultural norms and traditional knowledge:	Village and household.	Ongoing.	Knowledge. Social capital.	Ongoing.	Older woman.	Maintenance of tradition. Maintenance of individual's social status.	(?) Older woman.

### **4.3.3. Tool 3: Institutional Analysis.**

The institutional analysis is, in reality, a concept rather than a practical tool, and is borrowed directly from Kabeer's Social Relations Approach (see Table 10 and Fig 2). As discussed earlier, an institutional analysis draws attention to the multitude of organisational forms that the four key, inter-related institutional locations (State, Market, Community, and Family/kinship) can take, and how, through the combination of rules, resources, people, activities and power, these affect the production, reinforcement and reproduction of social difference and disadvantage, both within the household and the wider community. This concept is included in this framework to encourage examination of the impact of socio-economic and cultural institutions and organisations on intra-household decision-making and resource allocation. Furthermore, institutional analysis may help highlight institutional and organisational constraints on individuals' (who are characterised by clusters of disadvantage) ability to improve their livelihood and well-being – this may suggest avenues for successful policy interventions.

When conducting the institutional analysis, only one form of difference should be directly considered at once, otherwise the significance and/ or level of understanding may be diminished; however, there may be a strong correlation between the information generated for different dimensions of difference.

The value of this form of analysis is demonstrated by using impairment and disability as an example. According to Berthoud *et al* (1993), people with impairments experience disability as a consequence of society's failure to adapt itself, and the exclusion of disabled people from social institutions. Firstly, by challenging the ideological neutrality and independence of institutions, the concept of institutional analysis recognises that the group in power (the non-disabled) subordinate those without power (the disabled). Secondly, it examines how the rules/ customs and practices of the State (lack of anti-discrimination legislation and enforcement of existing legislation), the Market (denial of opportunities to the disabled, including education and health services, credit and transport), the Community (social stigma and exclusion, condoning domestic/community abuse against disabled people), and the Family/ kinship (unequal allocation of resources, abuse) interact to discriminate against individuals with disabilities. Finally, the analysis indicates the practical and strategic needs of disabled people, the fulfilment of which will alter the routine practices of institutions, transforming the environment in which disabled people live.

### **4.3.4. Tool 4: Practical and Strategic Needs Assessment.**

This tool represents a simple adaptation of Moser's gender needs assessment. It can be used to identify the practical needs (addressing immediate perceived necessity, but not challenging a group's subordinate position in society) and strategic needs (to transform existing imbalances of power) of any group characterised by a locally defined cluster of disadvantage. The identification of these needs is of real importance when attempting to understand the potential opportunities and constraints of a group, and also allows for targeted development interventions. It is, however, crucial to recognise that even a small group is unlikely to be homogeneous, so although these needs may generally be applicable, they may not be accurate in all cases. For example, in one household a physically impaired child may be neglected to the point of death, in another a child suffering the same impairment may be cared for and

nurtured, allowing him/ her to live an active, productive and happy life. Table 16 provides an example of a practical/ strategic needs assessment of a physically impaired adolescent.

**Table 16: Example of Tool 4: Needs Assessment (of a physically impaired adolescent).**

Practical needs	Strategic needs
<ul style="list-style-type: none"> <li>• Provision of restorative equipment (crutches, etc).</li> <li>• Adequate food.</li> <li>• Access to education/ specific training.</li> <li>• Access to appropriate healthcare if needed.</li> <li>• Access to appropriate transport.</li> <li>• Access to credit &amp;/ or saving schemes.</li> </ul>	<ul style="list-style-type: none"> <li>• Collective organisation.</li> <li>• Right to speak out.</li> <li>• Disabled role models in leadership positions in the community and development projects.</li> <li>• Education / skills in leadership.</li> </ul>

#### **4.4. Intra-household Level Analysis (Case studies).**

This tier of analysis examines in detail two or three households in which a member characterised by a cluster of disadvantage lives. These case studies will help triangulate community level data, contextualise the individual within the household by identifying the roles and activities of all household members, and examine the capabilities and vulnerabilities of those characterised by a cluster of disadvantage (which may indicate possible interventions to improve their well-being). Several case studies will be collected for each cluster of difference to help ensure accurate information, while allowing for variations between households.

##### **4.4.1. Tool 1: Activity, Access and Control Profile.**

This tool, with some alterations, is very similar to that used at the community level. The 24 hour profile will be conducted for the individual characterised by a cluster of disadvantage, and will provide direct triangulation for the information obtained at the community level. The second, more general profile, will examine the activities of all household members, therefore, a ‘Who?’ column is added to the profile. This profile will contextualise the individual within the wider household, and may indicate the impact/ cost/ benefit of an individual’s difference (e.g. disability, illness, etc.) on other household members (for example, girls spending less time at school and more time caring, or a mother spending more time on productive activities because of childcare provided by older household members). As the 24 hour profile used at the intra-household level is no different from that employed at the community level, no example is given here; an example of the general household profile is given in Table 17.

**Table 17: Example of Tool 1: Activity, Access and Control Profile (profile of the last 12 months – household including a visually impaired girl).**

Activities	Who?	Where	When?/ How long?	Resources used	Who controls resource?/ who do you need to negotiate with?	Benefits produced	Who controls the benefits?
<b>Productive Activities</b>							
Subsistence crop cultivation:	Mainly wife and children	Household land	Most days. Seasonal labour demands	Household land & labour, (largely) retained seeds	Head of household (usually husband?/ adult male?)	Food	Head of household (usually husband?/ adult male?)
Poultry rearing (free range):	Wife	Family compound	Low intensity	Wife given first chicken, others reared from eggs	Head of household (usually husband?/ adult male?)	Food, eggs, income	Head of household (usually husband?/ adult male?)
Casual work (brickmaking):	Adult males (and sometimes females)	Village & neighbouring villages	Erratic employment. High intensity. 10-12 hr day.	Farm implements, valley bottom clay	Implements = husband. Clay = CPR*	Income	Head of household (usually husband?/ adult male?)
Casual work (agricultural labour):	Wife and older children	Village and neighbouring villages	Seasonal. High intensity. 10-12 hr day.	Own farm implements	May need husband's permission	Income	Head of household (usually husband?/ adult male?)
<b>Reproductive Activities</b>							
Childcare, including provision of food:	Adult women and children	Compound	Full-time. Overlapping with other tasks.	Household land, labour and implements	Some controlled by adult women, others by adult men	Well-being. Healthy & well-behaved children	Society & ultimately the adult nurtured by the household
Collecting firewood:	Adult women & children	Village & surrounds	1+ hour per day	Common land (CPR*)	Village leadership	Warmth, fuel for cooking, light	?
Collecting water:	Adult women & children	Borehole 0.5km from compound	½ hour per day	Government drilled well	Public good/ village leadership	Water (washing, cooking, drinking)	Household
<b>Community Activities</b>							
Community meetings/ development projects:	Adult men (sometimes adult women)	Village	Occasional. 3 days/ person/ year	Time, sometimes surplus grain (for beer) and labour contribution	NGO? Donor? Government representatives?	Variable	?
Ceremonies:	Whole family	Village	Seasonal. 5 days/ year	Time, sometimes surplus grain (for beer)	Village elders	Well-being, social capital	?

\* = Common property resource.

#### **4.4.2. Tool 2: Capacities and Vulnerabilities Analysis (CVA).**

The final tool recognises that all individuals have vulnerabilities *and* capacities/ capabilities (including psychological ones) that change over time, and may affect people's responses or ability to respond to changes within the household. The CVA (Table 18) is concerned with mapping how the capacities/ capabilities and vulnerabilities of an individual characterised by a cluster of disadvantage change over time, with resources lost, maintained, altered and improved.

Three categories of capacities and vulnerabilities are examined within the matrix: physical/ material, social/ organisational, and motivational/ attitudinal. The matrix, divided into two sections ('Before' and 'After' an event, such as becoming physically or mentally impaired, death of a household member, etc), encourages users to question how productive resources, skills and hazards; social relationships and participation in social organisations; and motivations, attitudes and beliefs are altered by an event to increase or decrease an individual's (and other household members') vulnerabilities and capacities. The tool can also examine the impact of positive events on both the individual and the wider household; for example, the introduction of a targeted intervention (e.g. old age pension) has the potential to create a cascade effect within the household improving aggregate well-being, and altering the allocation of benefits that result from an individual's productive resources, skills and knowledge (Devereux, 2001). The tool also helps to identify what resources were/ are needed to reduce vulnerabilities and increase capacities.

It is important to note that although the prime use of the tool is to examine how a particular event (e.g. illness, impairment in adulthood, a husband's marriage to a second wife, etc.) affected an individual's capacities and vulnerabilities, and consequently their position, role(s), power and control within the household, it remains valuable when identifying the capacities and vulnerabilities of an individual characterised by a dimension of difference that has existed since birth (as with some forms of impairment). This is particularly the case when attempting to promote more effective development interventions.

If time is limited when researching, conducting a vulnerabilities and capacities analysis of only the individual directly affected by a dimension of difference (e.g. a disabled boy) is probably the most important. However, as other household members are indirectly affected by the presence of disability, etc. (in terms of altered roles and allocated resources), it would be useful to conduct a CVA for each member of a household, as this may indicated wider levels of intra-household asymmetry and inequality.



**Table 18: Example of Tool 2: Vulnerability and Capacity Analysis (of a male household-head after he contracted HIV).**

	Vulnerabilities	Capacities
<b>Before event</b> e.g. disability old age marriage of 2 <sup>nd</sup> /3 <sup>rd</sup> wife, etc.	<ul style="list-style-type: none"> <li>Contracted HIV</li> </ul>	
<b>Physical/material</b> What productive resources, skills, knowledge, and hazards exist? What access to and control of benefits (of this individual's productive resources, skills and knowledge) do other household members have?	<ul style="list-style-type: none"> <li>Prevalence of sexually transmitted diseases (STDs) in the community</li> </ul>	<ul style="list-style-type: none"> <li>Owned two houses</li> <li>Owned a bar</li> <li>Traded agricultural produce</li> <li>Grew crops for sale</li> <li>Children in primary and secondary school</li> </ul>
<b>Social/organisational</b> What are the relationships between people? What are their organisational structures? What is the status and influence of the individual within the household?	<ul style="list-style-type: none"> <li>Wife was sick and then died (of AIDS)</li> </ul>	<ul style="list-style-type: none"> <li>Leading community figure</li> <li>Respected</li> <li>Active participant in community politics</li> <li>Household head.</li> <li>Main income earner</li> </ul>
<b>Motivational/attitudinal</b> How does the individual view their ability to deal effectively with their social/ political environment, and to create change? What are the individual's beliefs and motivations? How do other household members view/ value the individual?		<ul style="list-style-type: none"> <li>Successful</li> <li>Desire to expand business</li> <li>Critical to household maintenance and prosperity</li> </ul>
<b>What resources are needed to reduce vulnerabilities and increase capacities?</b> Who controls these resources?	<ul style="list-style-type: none"> <li>(Sexual) Health awareness education – provided by government or NGOs</li> <li>Availability of condoms – private, NGO or state provision</li> <li>Improved health care – private, NGO/ Church or government</li> <li>Provision of health insurance – community or government run contributory scheme?</li> <li>Provision of saving scheme – community, NGO, private or state run</li> </ul>	
<b>After event</b>		
<b>Physical/material</b> What productive resources, skills, knowledge, and hazards exist? What is the impact on aggregate household resources? What is the impact on other household members' personal resources/ access to services? What is the impact on other household members' access to and control of benefits (of the individual's productive resources, skills and knowledge)?	<ul style="list-style-type: none"> <li>Medical expenses = Ugandan Sch. 15,000-20,000 per month.</li> <li>Had to sell part of his land</li> <li>Physically weak and exhausted</li> <li>Susceptible to illness</li> <li>Need to eat well regularly</li> <li>Reduced income affects children's schooling and access to healthcare</li> </ul>	<ul style="list-style-type: none"> <li>Rents the houses to support family</li> <li>Owens bar</li> <li>Grows crops for consumption</li> </ul>
<b>Social/organisational</b> What has been the impact of _____ on the level of and participation in social organisations/ structures? What is the impact on the individual's status and influence within the household?	<ul style="list-style-type: none"> <li>Death of sister from AIDS – loss of emotional support</li> <li>Current wife also HIV+</li> <li>Social stigma (from some members of the community)</li> <li>Reliance on family care</li> </ul>	<ul style="list-style-type: none"> <li>Family support</li> <li>Community solidarity</li> </ul>
<b>Motivational/attitudinal</b> How does the individual perceive (in terms of beliefs, etc.) their situation? Do they believe they have the ability to shape their own lives? What is the impact on how other household members view/ value the individual?	<ul style="list-style-type: none"> <li>Will die</li> <li>Frustrated</li> <li>Increasingly seen as a burden</li> </ul>	<ul style="list-style-type: none"> <li>Want to live as long as possible</li> <li>Desire to care for his 4 children for as long as possible</li> </ul>
<b>What resources are needed to reduce vulnerabilities and increase capacities?</b>	<ul style="list-style-type: none"> <li>Access to (free or subsidised) healthcare services</li> <li>Changed social attitudes</li> <li>Risk-minimisation education to avoid infection of carers</li> </ul>	

## 5. Conclusion.

Contrary to neo-classical models of household collectivity, resource allocation and decision-making within the household are affected by multiple factors, including individual agency, power and information asymmetries, supra-household social relations, and non-household institutions. Rather than a site of altruism and co-operation, the household is often a site of negotiation, bargaining and even conflict, with individuals having differential access to and control over resources and benefits. Consequently, it is possible for differential levels of wealth and poverty, consumption, and leisure and work to exist within the household. Various gender analytical frameworks have helped researchers and development practitioners to recognise this reality, shedding light on intra-household decision-making processes and resource allocations.

However, gender frameworks focus on gender as *the* dimension of difference within the household (arguably alongside age); as the literature discussed indicates, this is not the case. Within the household there are potentially numerous dimensions of difference, which are culturally, temporally and spatially specific, that can affect decision-making and resource allocation. These include, amongst others, age and birth order, illness, impairment and disability, and the of wives status and their children. Despite descriptive documentation of these dimensions of intra-household difference and their impact on decision-making and resource allocation, there has been little critical analysis of these differences. This Paper represents an attempt to alter that situation.

Having critically examined various existing gender analytical frameworks from the perspective of their applicability to analysing other dimensions of intra-household difference, this Paper has presented a set of tools and concepts based on gender analysis that should act as a starting point for future critical analysis of (non-gender) intra-household inequality. The Framework, or toolbox, presented here promotes a two-tier approach to analysing intra-household asymmetries.

The first tier, at the village/ community level, will involve the identification of locally specific “clusters of difference/ disadvantage” that, generally within the community, produce the poorest members of households. Based on these community-identified “clusters of disadvantage”, an activity, access and control profile will identify what people do (and with what) despite their disadvantages. Next, an institutional analysis will encourage examination of how institutions and organisations produce, reinforce and reproduce social difference and disadvantage. Finally, a practical and strategic needs analysis is conducted.

The second tier, at the intra-household level, provides more detailed case studies of a small number of individuals (2 or 3?) who are characterised by each of the “clusters of difference/ disadvantage” (and their households). Initially, an activity, access and control profile will identify the roles and activities (and resources used and/or controlled) of all household members. Finally, a capacities/ capabilities and vulnerabilities analysis will indicate how the capacities and vulnerabilities of an individual characterised by a “cluster of disadvantage” change over time, with resources lost, maintained and altered; if there is sufficient research time, the

capacities and vulnerabilities of all household members should be analysed to indicate the impact of a dimension of difference/ disadvantage on other household members.

These tools and concepts are suggested as a starting point for future critical analysis of intra-household inequality. It is most important, however, to recognise that local situations and realities may require substantial innovation; in the words of Sue Stubbs of Save the Children (UK) (1995:1), it is necessary to train “the muscles of perception (hearing and seeing) to be able to focus on marginalised groups and individual differences, and to recognise how one’s own limitations influences perception”.

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