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# 1 Introduction

Over the past decade, there has been substantial progress in advancing gender equality and women's and girls' empowerment in LMICs, particularly in health, education and political representation. There is now a growing body of evidence which demonstrates that well-designed and implemented social protection programming can support gender equality outcomes and, in some cases, promote women's and girls' empowerment across the life course (Kabeer, 2010; Holmes and Jones, 2013; Cookson, 2018).

Yet despite this progress, strong gender inequalities persist. In many countries there is a backlash against women's rights, and women's rights groups are suffering from shrinking influencing space and resources. A recent report shows that with the resurgence of conservative ruling coalitions, many parts of the world have seen restricted funding for women's groups, redirecting their focus to women's roles as carers rather than political actors (Wassholm, 2018).

This has had particularly negative effects for the poorest and most vulnerable women in countries most affected by these trends. For example, recent studies show that poor women and girls experience multiple deprivations and discrimination based on their gender and intersectional inequalities (Munoz Boudet et al., 2018). Women are disproportionately represented in the informal economy in low-paid or unpaid and irregular work; they have less access to income and assets; and they shoulder a disproportionate amount of the unpaid care work that sustains families. During adolescence, younger girls become increasingly subject to conservative social norms that limit their mobility, reduce their access to education and employment, and render them more vulnerable to sexual and gender-based violence (Harper et al., 2018; Baird et al., forthcoming).

Despite some of the positive effects of social protection in delivering more gender-equitable outcomes, there is concern that policy and programming neglects gender issues across the life course, from girls' heightened risk of gender-based violence and mobility restrictions during adolescence, to women's unequal access to pensions in older age (Jones et al., 2016; Molyneux et al., 2018). This leads to a gap between social protection programming and women's and girls' social and economic needs (Sholkamy, 2017). There also remain significant gaps in social protection coverage for women and girls (across the spectrum of programming). The benefits received and the types of gender-based exclusion addressed are also inadequate to meet women's and girls' needs at different life stages. The lack of attention to gender equality issues in policy design and implementation reinforces gender inequalities, perpetuating poverty and vulnerability among women and girls.

Over the past decade, various programming innovations have tried to address these gaps. There is now evidence on what types of social protection programming work to improve coverage for women and girls, and which features of programme design and implementation can best support and promote gender-equitable outcomes. However, much of the discussion on closing these gaps has focused on *technical* aspects such as targeting, the value, duration and timing of transfers, and access to grievance mechanisms. Discussions have also focused on meeting women's immediate and practical needs, framing women firmly within their traditional roles as mothers and carers. Yet discussions have largely ignored the crucial *political economy* factors that can help (or hinder) a more transformative gender-responsive approach.

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# 2 Taking stock of progress in promoting gender-responsive social protection

Progress towards gender equality and women's and girls' empowerment is context-specific and influenced by many factors. This section provides an overview of progress on gender-responsive social protection programming, highlighting specific programmes, regions and countries where progress has been most notable or most absent.

This paper draws on the definition of social protection as 'public and private initiatives that provide income or consumption transfers to the poor, protect the vulnerable against livelihood risks and enhance the social status and rights of the marginalised' (Devereux and Sabates-Wheeler, 2004: i). Typically, such programmes include social assistance (targeted transfers or benefits, public works programmes) and social insurance schemes.

## 2.1 Coverage gaps

Despite the growing popularity of social protection globally, there remain significant gaps in coverage. Recent International Labour Organization (ILO) figures suggest that only 45% of people are effectively covered by at least one social protection benefit; a large majority (71% or 5.2 billion people) are either not covered or only partially covered (ILO, 2017). Women are more likely to lack access to social protection; their lower representation in contributory social protection schemes reflects their lower labour force participation rates (UN

Women, 2015), although the exact gender gap is not known.

There has, however, been progress in reducing gender coverage gaps in particular programmes and countries. Some countries have closed the gender gap in pensions, and some have achieved universal pension coverage through non-contributory pensions (also called social pensions, typically paid to people aged 65 and above). While non-contributory pensions tend to offer smaller benefits (see below), they do provide some basic income security in old age for women and men who have either worked in the informal economy or done unpaid work, rendering them ineligible for formal labour force benefits (ibid.). As the Bolivian state came to define itself as 'plurinational', policy changes included increasing the proportion of older women receiving the non-contributory pension *Renta Dignidad*; now, women beneficiaries significantly outnumber men (83.3% versus 66.3%) (ILO, 2017). Social pensions have also been rolled out in Lesotho, Nepal, Thailand, Bangladesh, India and South Africa, though coverage varies significantly (from 85% in Lesotho to 35% in Bangladesh) (PensionWatch, n.d).

Non-contributory pensions tend to pay lower benefits, which are often insufficient to support older persons to escape poverty (ILO, 2017). However, they do tend to benefit lower-income groups, including women, who are less likely to receive any other type of pension (Arza, 2015).

Evidence from South Africa's Older Person's Grant, for example – which has a relatively high transfer value – shows positive impacts on poverty reduction and improving the status of women in rural households, as well as benefiting granddaughters through improved health and nutrition (Arza, 2015; Duflo, 2003).

However, social protection coverage for women of working age and for children and adolescents – especially in Africa and Asia and the Pacific – remains limited (ILO, 2017; Jones et al., 2019). Globally, only 41.1% of mothers with newborns receive a maternity benefit, while 83 million new mothers receive no state support (ILO, 2017). There has been some progress on this front in the Americas, where more than two-thirds of children, pregnant women and mothers of newborns are covered by social protection cash benefits (*ibid.*). Uruguay has achieved universal maternity coverage, with Argentina, Colombia, Mongolia and South Africa also making significant progress towards this (*ibid.*).

Moving away from social protection programming that supports women and girls in their traditional roles, conditional cash transfers (CCTs) to support girls' education and delay marriage have been expanded in India, Turkey, and some Latin American countries (de Walque et al., 2017). However, millions of girls from vulnerable households still have no social protection support (UNGEI, 2014).

Public works schemes are another key social protection intervention for people of working age, but women have often been unable to participate due to lack of childcare. Recently, some schemes have attempted to increase women's participation through gender quotas and on-site childcare provision. India's Mahatma Gandhi National Rural Employment Guarantee Scheme (MGNREGS) and South Africa's Expanded Public Works Programme have approximately 48% and 62% of female participants respectively (UN Women, 2015).

Some countries have also expanded social insurance to cover workers in the informal sector, though significant gaps remain. In Brazil, for example, the proportion of domestic workers contributing social security payments increased from 18% in 1993 to 30% in 2007 (Addati and Cheong, 2013). In Ghana, the National Health

Insurance Scheme introduced in 2003 aims to deliver universal health insurance coverage and ensure equitable access to healthcare. By 2013, 38% of Ghanaians were enrolled and 58% of them women (National Health Insurance Authority, 2013). However, despite providing free insurance to the poor through the Livelihood Empowerment Against Poverty (LEAP) cash transfer programme, coverage rates among the poor are low. Overall, evidence on women's coverage by health schemes and their impact across the Global South is still sparse (Jones and Scott, 2016).

## 2.2 Addressing gendered risks and vulnerabilities across the life course

As well as coverage gaps, there are concerns that social protection programming does not adequately address the specific needs of women and girls across their lives. There is wide variation in the extent to which social protection schemes take into consideration gendered risks and vulnerabilities, linked to women's unpaid care and domestic responsibilities, reproductive health needs, and the broader discriminatory gendered social norms and practices that affect women's and girls' daily lives.

There has been progress in incorporating gender equality considerations in pensions – for example, recognising women's differentiated career patterns and the impact of this on income security in old age. As a result, some countries have taken proactive measures to embed gender-responsive social protection, such as crediting pension accounts during maternity leave in Chile, and establishing appropriate paternity and parental leave (UN Women, 2015; ILO, 2017). However, these policies mainly benefit formal sector workers; the expansion of non-contributory pensions to workers in the informal sector is clearly a priority for LMICs.

Public works schemes in Ethiopia, India and Rwanda have included design features such as gender quotas, creches at work sites, flexible working times, direct support for pregnant and nursing women, equal wages, and representation in supervisory roles – all of which can enhance women's participation and outcomes. However, implementation routinely lags behind progressive

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design features; together with inadequate levels of benefits, this may limit women's access to schemes and limit outcomes.

CCTs – popular in many Latin American countries – are often perceived as gender-responsive if they target women. Yet they have been criticised for the tendency to reinforce gender stereotypes and for placing additional burdens on women's time (Molyneux, 2007; Cookson, 2018).

Clearly, programming needs to do more than simply target women. Evidence suggests that programmes must address women's and girls' specific social and economic needs from the outset if they are to deliver more gender-equitable outcomes (Holmes and Jones, 2013). In particular, social protection programming can contribute to women's empowerment, especially if situated within a broader social policy system that addresses women's rights and needs – for example, through provision of basic services, education, training, credit, childcare, and long-term income security (UN Women, 2015).

However, progress has been limited, with few social protection programmes designed to explicitly promote women's empowerment by strengthening agency, voice and participation. Exceptions include Pakistan's Benazir Income Support Programme (BISP), which targets women as heads of households, and where the requirement for national identity has enabled women to gain voting rights, and improved their financial literacy and inclusion. BISP participants are also mobilised to form committees to demand improvements in local services, and initiatives have included exposure to female role models (BISP, n.d). In Egypt, the *Takaful* programme (a CCT launched in 2015) aims to contest traditional gender roles around caring responsibilities, instead focusing support to women's productive roles. It also aims to strengthen women's agency through encouraging their participation in paid employment, transferring cash directly to women through their personal bank accounts, and encouraging their involvement in programme governance and monitoring (Sholkamy, 2011; El-Didi et al., 2018).

To sum up, although many social protection programmes have integrated gender-responsive

features that have contributed to improved outcomes, such features are still not routinely integrated into policy and programme design. Few programmes aim to transform gender relations or have equality or empowerment as their core objectives. Despite greater recognition of women's unequal care burden, few programmes set out to address and transform gender relations at the household or community levels. This means that social protection largely continues to neglect the important effects of intra-household power relations, resource allocation, gendered social norms and women's unequal access to economic resources.

While there is increasing evidence on the politics of the expansion of social assistance in developing countries in general (Hickey et al., 2015), it lacks a gendered lens. Likewise, recent work on the politics of gender in inclusive development policies has not focused on social protection (Nazneen and Masud, 2017). This leaves a significant knowledge gap on the politics of gender-responsive social protection programming. Specifically, there is limited understanding of the political processes that influence choices around the type of social protection model adopted in a given context, and the extent to which this model aims to meet women's and girls' practical needs or takes a more transformative approach.

This working paper aims to start filling this knowledge gap. We argue that taking a gendered political economy approach is important to understand what drives gender-responsive social protection and to identify opportunities to build a more gender-transformative agenda, as well as recognising key barriers. Based on a review of existing literature, it provides an analysis of the critical political processes for gender-responsive social protection. It also identifies bottlenecks and opportunities for integrating gender equality and empowerment into social protection policies and systems. Finally, we provide a framework for those working on gender and social protection to further identify and understand these political economy dimensions, to help them develop a plan of action to overcome barriers and promote a politically smarter way of working on social protection and gender.

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# 3 Conceptualising a gendered political economy approach to social protection

Understanding policy and programming challenges from a gendered political economy perspective requires a detailed look at how the market, political and economic institutions, and gendered social norms and practices all interact with and shape each other to influence policy decisions. A political economy analysis can shed light on how international development policy decisions are made through domestic political processes, and on competing interest groups and their relative power in shaping social policy and outcomes (Holmes and Jones, 2013).

Development policy and programming choices are, in practice, political outcomes. They are the result of a process of bargaining between the state and diverse actors (including civil society organisations (CSOs) and groups, non-government organisations (NGOs), donors and development partners, and other interest groups). They are also the result of interactions between formal and informal institutions (Helmke and Levitsky, 2004), and of the interplay between institutions and the role of ideas in shaping policy and programming objectives (Steinmo et al., 1992). One way to analyse the policy processes and decisions around social protection and gender is to look across the ‘three I’s’ of political economy (Rosendorff, 2005): institutions, interests and ideas:

- *Institutions or institutional arenas* (for example, elections and party politics, the

legislature, the judiciary, informal politics). This means the rules of social, political and economic interaction, and the opportunities and constraints they present for negotiating social protection policies and programmes.

- *Interests of key actors* who are likely to gain or lose from policy shifts (such as political elites, bureaucratic agencies, donors or civil society ‘champions’) and the relative balance of power between them. This includes power imbalances between different ministries (such as finance/economics and social welfare, the latter often being among the weakest), and wider social and political interests.
- *Ideas held by elites and the public* reflecting prevailing beliefs about poverty and its root causes, the social contract between the state and citizens, and the merits of particular forms of social policy or nationally led programmes. This may include notions of the ‘deserving poor’, concerns about ‘dependency’ and attitudes towards inequality and social fragmentation (Hickey, 2009).

We frame our analysis of the three I’s using a gender lens to explore how actors at the household, community and national levels influence – and are influenced by – gendered social norms, and how these structures and processes influence policy decisions and outcomes (Elson and Cagatay, 2000).

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# 4 Political economy analysis

## 4.1 Institutions

### Box 1 Institutions analysis – key points

- There are opportunities for activists and international actors to strategically engage across a range of different institutional arenas and networks – from the global to the sub-national, and from formal to informal – to make social protection policy and programmes more gender-responsive.
- The sub-national institutional arena is a key area in which to advance more gender-responsive approaches to social protection, as local-level political processes offer important opportunities for engagement through locally elected officials (often meaning greater representation of women), and mechanisms for holding officials to account for delivering their social protection commitments.
- Resource allocation decisions are most often made through informal rather than formal institutions. This means that international actors also need to engage with less visible decision-making processes at national or sub-national levels. This includes working with ‘gatekeepers’ of social norms (such as religious leaders), and taking account of practices of clientelism and patronage that may shape decisions on resource allocation.
- There are significant evidence gaps, especially around the effects of political regimes and judicial institutional arenas on shaping the design, implementation and outcomes of gender-responsive social protection. These need to be addressed through well-designed research.

To better understand how social protection measures are negotiated to be gender responsive, we must distinguish between the different institutional spaces where decision-making takes place, where legal and policy content and implementation processes are negotiated, and the gendered effects these processes give rise to (see Box 2). Different institutional systems can either enable or constrain gender equality activists’ political voice in framing social protection narratives, and their access to decision-making on legal change, policy, programming and practice. Crucially, institutions at all levels (global, national and sub-national) can determine

the potential for transformational change that advances women’s empowerment (Holmes and Jones, 2013).

There are two key questions about how institutions affect the design and impact of social protection in relation to gender:

- How do institutional features enable and constrain gender equality activists’ agency and role in shaping social protection objectives, implementation processes and outcomes?
- How can social protection measures enhance women’s voice and agency, and their capacity



## Box 2 Defining institutions

By institutions, we refer to the ‘relatively enduring features of political and social life (rules, norms and procedures) that structure behaviour and cannot be changed easily or instantaneously’ (Mahoney and Thelen, 2010: 4). Institutions can be formal or informal. Waylen (2014) underlines the importance of informal institutions in shaping social, political and economic life, in predictable if less visible ways than formal institutions. Thus, efforts to advance gender equality and women’s voice and agency often require navigating and contesting the web of informal rules and norms that sustain gender inequalities, even when formal gains in gender-responsive social policy or women’s rights have been achieved.

to contest and redefine institutional spaces, in ways that advance women’s empowerment?

Building on the work of Holmes and Jones (2013), we consider the following institutional arenas: regime type, electoral, legislative and judicial space, and executive branch and state agencies in charge of implementing or overseeing social protection measures. In all of these arenas, we find informal institutions (rules and practices) shaping how decision-making actually happens, how power is distributed, and who has access, presence and influence in shaping policy implementation and outcomes.

### 4.1.1 Political regime and developmental pathways

There appears to be a strong correlation between established democracies and sustainable inclusive social policy systems, although the causal links in this relationship remain contentious (Hickey et al., 2015). However, regime type and the quality of democratic governance matters, as does how the distribution of power and resources has been contested and defined over time. We know that the mere presence of formal democratic politics is not, in itself, an indicator of progressive social policy regimes (Hickey and Lavers, 2015). At the same time, the formal rules on political voice and contestation of power are important in shaping the prospects for inclusive development. This is also true for the rules about women’s involvement in decision-making processes and the achievement of gender justice (Htun and Weldon, 2018).

Overall, the evidence on how political regimes shape social protection, and who is involved in driving gender-responsive social policy, remains

case-specific and patchy. There are, however, a number of key inter-related points:

- As well as the *formal features* of regime types, the nature of the *prevailing elite bargain* or *political settlement* defines how economic, political and social power and resources are distributed and sustained (Khan, 2010; Hickey and Lavers, 2015; Hickey et al., 2018). The ruling political settlement thus reflects the nature of dominant power relations, interest structures, ideas and beliefs about social justice, and the institutions that sustain this.
- Progress requires strategic engagement with the *existing* political settlement, addressing formal and informal institutions and rules to overcome resistance to progressive change (Domingo and O’Neil, 2016). However, there is limited evidence on the political economy of how gender equality activists and women navigate and contest informal institutions relating (for instance) to clientelism, and what effect this has on advancing gender justice (Nazneen and Mahmud, 2015). This is true across different policy areas; yet there are major evidence gaps on the political settlement and gender-responsive social policy.
- There is clear evidence that advancing gender equality through formal policy or legal change matters, both for practical gains and in amplifying women’s political voice. This can have a catalytic effect on women’s empowerment and generate new institutional and political opportunities to negotiate more inclusive forms of development (Htun and Weldon, 2018). Opportunities for change

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may be unleashed at critical junctures (such as peace processes, regime transition or constitutional reforms) or during progressive change processes.

- How any expansion of social protection is politically negotiated – and its gendered content and impact – is highly specific to context and history. Htun and Weldon (2018) highlight the importance of understanding how institutional change and the politics of contestation interact to enable women to advance their rights and promote more gender-inclusive societies (Holmes and Jones, 2013).<sup>1</sup>

### 4.1.2 Electoral arena

Electoral processes are important opportunities for gender equality activists to mobilise political pressure (see also section 4.2, ‘Interests’).

However, evidence on how electoral politics relates to the gender dimension of social policy (and particularly social protection) is thin. This is also true of how different electoral systems affect women politicians’ conduct in relation to social protection (again, see section 4.2 below).

Holmes and Jones (2013) cite Mexico’s *Estancias Infantiles* (Federal Daycare Programme for Working Mothers) as a good example of activists using elections to obtain policy gain. *Estancias* was introduced in 2007 to help women enter the labour market, providing care to more than 330,000 children by 2012. However, as Box 6 (section 4.2.4) highlights, the programme was curtailed in 2015 while undergoing a major policy review under the new presidency of Andrés Manuel López Obrador.

Electoral politics can also distort how social protection is perceived, which in turn affects implementation. In Ghana, for example, the LEAP programme was politicised during the election campaign in 2008, resulting in uneven implementation: opposition party supporters in some locations chose not to participate in the programme, perceiving that they would be seen as supporting the government, but after the election they were unable to register for the

programme (Amuzu et al., 2010; Holmes and Jones, 2013).

Nazneen and Mahmud (2015) signal a stronger evidence base on sub-national electoral politics in relation to policies supporting gender equality. As noted in section 4.2, there is a relationship between women being elected to local representative and decision-making roles that champion social policy issues, and the provision of public goods. At the sub-national level, local elections may be perceived as opportunities to hold officials to account on social protection, as in the case of *Bolsa Familia* beneficiaries in Brazil (Sugama, 2016). Evidence from Colombia’s CCT, *Familias en Accion*, finds that those receiving cash transfers were more likely to cast a ballot (in the 2010 presidential elections), (Conover et al., 2019). For women, this corresponded to a 2.8% increase in average turnout, while for men it was 1.5%. Women receiving the transfer were also more likely to vote for the incumbent party candidate (who supported the cash transfer) (ibid.).

There is also some evidence that politically empowered women at community level – including women who may have benefited from social protection programmes – are more likely to mobilise politically and use electoral moments to advance local public goods (Asaki and Hayes, 2011; Nazneen and Mahmud, 2015). This is because women often have more opportunities to assume leadership positions in local rather than national politics (Domingo et al., 2015). Moreover, the empowering effect of social protection measures may enhance the prospects for beneficiary women to become politically active in sub-national politics. They may also go on to form strategic alliances with activists in local CSOs and NGOs that become involved in local electoral agendas (see below).

While cash transfers can increase trust in local government, it is not clear that this trust translates into changes in political activity among beneficiary groups (Evans et al., 2018; Babajanian et al., 2014). In contrast to the evidence from Colombia (mentioned earlier),

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1 Reviews of the evidence signal a highly uneven knowledge base about how social policy that advances women’s rights and women’s empowerment is negotiated through the political system in its design and implementation, and with what effect in terms of advancing women’s empowerment (Nazneen and Mahmud, 2015; Domingo et al., 2016).

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a study from Tanzania's pilot CCT found that after more than two years' implementation, beneficiaries were found to be more likely to report that local government leaders were responsive to citizens' concerns, but no more likely to vote in village council elections or attend village council meetings (Evans et al., 2018). There were similar findings from a study in Afghanistan, Bangladesh, India and Nepal (Babajanian et al., 2014)

### 4.1.3 Legislative arena

As noted earlier, the wider political context will dictate the actual role of formal politics in shaping political outcomes. The degree to which legislatures either actively negotiate policy or mostly formalise and rubber-stamp deals struck through clientelism and patrimonial politics has been the subject of considerable research. However, there is relatively little research from the perspective of female legislators' conduct, and in relation to advancing gender-responsive social policy or social protection agendas (Holmes and Jones, 2013; Domingo et al., 2016). It is also the case that the role of the legislature in shaping social policy may be less relevant – as in much of Africa, where social protection programmes are heavily driven by the executive branch.

Generally speaking, the presence of more women in legislative spaces is correlated with more inclusive social policies (Htun and Weldon, 2018). However, evidence on causality remains elusive. There is now greater recognition of the importance of intersectionality in shaping women's political and ideological preferences and loyalties, taking into account class, ethnicity, religion, rural–urban divides, and ideology.

When feminist agendas are effectively deployed in legislative politics – where laws are made and policy choices articulated – they can help bring gender into debates and policies addressing social inclusion and redistributive measures. Strategic alliances between women's representatives and feminist movements and women's groups are a consistently relevant factor. At the regional and global levels, the expansion of international

norms and policies upholding social and economic rights, and women's rights and gender justice, is an additional enabling factor, providing political and reputational leverage in advocating gender-responsive change (see also section 4.3, 'Ideas').

There are a number of examples where feminist political activism has contributed to revisions of laws on entitlements (Waylen, 2009; Rubio-Marin and Irving, 2019). Kenya's recent experience of constitutional reform – at least in terms of content – is one such example. Women legislators worked together across parties, in alliance with the Federation of Women Lawyers (FIDA), and in collaboration with the emerging gender machinery, to secure substantive gains for women and girls in the 2010 Constitution (Domingo et al., 2016). They also achieved subsequent and broader reforms, including tax waivers for sanitary pads as a way to prevent girls missing school. The advocacy work included using the review of labour laws to push for an increase in maternity leave under the Employment Act of 2007.

New constitutions (as in South Africa, Colombia and Kenya) include more explicit state commitments (as justiciable entitlements) on social policy, women's rights and gender equality. This reflects a relatively recent move towards more explicitly normative commitments at constitutional level designed to prevent venal electoral politics undermining state commitments.<sup>2</sup> The realisation of such rights may, in practice, be limited, for reasons ranging from limited fiscal capacity and implementation or law enforcement capabilities, to the true nature of the ruling elite bargain, which may not mirror ambitious constitutional promises.

The emerging evidence suggests that technical knowledge of the law and policy processes also matters. Gender equality activism in support of legislative or policy change is more effective when it can draw on technical capabilities relating to legal expertise, and understanding of legislative procedures. Even when formal law

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2 Essays in Williams (2009) underline the need to take account of intersectionality in shaping how political agendas among women involved in constitutional reform processes evolve. In the case of Colombia, strategic litigation by women's movements and progressive rulings by the Constitutional Court have resulted in an affirmation of justiciable rights.

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may seem irrelevant to the lives of many women at sub-national level, and where state presence is weak, gender-responsive social policy and laws can provide an institutional framework for social protection measures that are also gender-responsive (Domingo et al., 2013).

#### 4.1.4 Judicial arena

The judicial arena has traditionally been less influential in shaping social policy, largely because it has mostly been reactive. Courts do not generally make policy, but may review whether policy design and implementation is in keeping with normative orders, such as constitutions, laws or international rights commitments. However, in recent decades, disadvantaged groups have increasingly turned to the law to pursue their social and economic rights. As laws and constitutions have been reformed, the judicial arena has become an increasingly relevant site of contestation. As such, there is a burgeoning of literature on how legal mobilisation and strategic litigation has been used by vulnerable groups, to varying effect, to challenge power asymmetries and pursue social and economic gains (Gauri and Brinks, 2008; Gloppen, 2011; Gianella et al., 2013, among others).

Social protection policy is rarely framed in terms of rights-based approaches, so does not lend itself to judicial activism in the same way that other areas of policy might do. In contexts where social protection is grounded in constitutional or legal frameworks (such as India, Colombia, Brazil and South Africa), there are merits to using rights language to mobilise advocacy and judicial activism to hold states to account on their commitments to women. Involving legal framings of rights-based citizenship also creates opportunities for women to exercise voice and agency (Sabates-Wheeler et al., 2017).

An example of this is in India where judicial activism in the Indian Supreme Court has made some constitutional principles (directive

principles) justiciable in relation to social welfare issues, including education, the right to food and healthcare.

#### 4.1.5 Social protection systems, gender machinery and state bureaucracies

As with the previous arenas, it is important to distinguish between national and sub-national levels when looking at where programming decisions are made. This has implications for which structures or bodies 'own' the process of identifying social protection needs and defining programming objectives. This is also important for setting up mechanisms for coordination and implementation, accountability, and monitoring and evaluation (M&E) (Holmes and Jones, 2013).

Two other factors are important: how social protection programmes feature at national level or within the state system of service provision, and where responsibility lies for ensuring gender-sensitive orientation. In lower-income or fragile and conflict-affected settings with limited state capacity or territorial presence, or where gender machinery and gender-sensitive budgeting is absent or weakly structured, gender-responsive social protection is often weaker (Holmes and Jones, 2013; Jones and Holmes, 2010). Even in Latin American countries where state capacity is stronger (such as Mexico), strong gender perspectives are not necessarily integrated into social policy design and implementation (Pereznieto and Campos, 2010).

More systematic mapping of social protection organisational mechanisms means considering the following questions: (1) What is the nature of the relationship between the state bodies responsible for national oversight and implementation of social protection programmes, and the body (or bodies) tasked with monitoring any gender social protection component? (2) What is the nature of the relationship between national and sub-national governance systems?<sup>3</sup>

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3 Different types of federalism or decentralised state functions shape decision-making and budget and financial flows to service delivery, with implications for the resourcing and implementation of social protection programming. For instance, in Mexico, state-level governments run by parties in opposition to the national ruling party are not incentivised to highlight the successes of gender-responsive social protection that can be attributed to federal government (Pereznieto and Campos, 2010).

## 4.2 Interests

### Box 3 Interests analysis – key points

- Trade-offs in policy choices, the politics of who is likely to gain or lose from policy shifts, and the balance of power between actors all influence how stakeholders promote their interests through social protection.
- Political elites have not had strong incentives to push for a gender-responsive social protection agenda, though there are opportunities to push this agenda at the sub-national level through elected women's representatives and closer links between women's rights movements and other actors.
- Donors and international agencies have not fully mainstreamed gender equality in social protection, and there is more to do to embed recommendations agreed by states in international fora into national policies and systems. Progressive changes tend to evolve over time and reflect broader donor commitment to mainstreaming gender in programming and using gender-mainstreaming tools for equality and empowerment outcomes.
- Domestic civil society actors could play a critical role in influencing gender-responsive social protection, but apart from issue-based advocacy (e.g. access to childcare or social protection for informal workers) have yet to engage fully on these issues. There is a need to bridge the local-national divide and build partnerships and coalitions across sectors.
- Progress towards gender-responsive social protection is more likely where multiple actors' interests align and are well-coordinated, and where institutional resources and capacities are sustained over time.

A diverse set of actors are involved in social protection policy and programming, including political elites, government bureaucrats across a range of ministries, international agencies and civil society actors – all with different interests, degrees of influence and capacities. In this section, we examine how the *interests* of these actors influence gender-responsive social protection. We look at how policy-makers face choices about which interests to promote, the politics of who is likely to gain or lose from policy shifts, and how the balance of power between actors affects the take-up and roll-out of gender-responsive social protection.

### 4.2.1 Interests of political elites

Understanding the political motivations for introducing or extending social protection requires an analysis of how political elites use social protection programmes to strengthen their legitimacy and hold on power (Barrientos and Pellissery, 2015; Hickey et al., 2018). Recent analyses of the politics of social assistance argue that elites are more willing to extend assistance

when a crisis has threatened national political legitimacy, seeing social assistance as a possible way of restoring legitimacy (Binat Sarwar, 2018; Hickey et al., 2018).

For example, Rwanda is investing in social protection as a key national development policy – its ruling elite having been described as failing to translate economic growth into poverty reduction and ultimately threatening claims to promote inclusive development and build a post-ethnic society (Hickey et al., 2018). Similarly, in Botswana and South Africa, the welfare state became a pillar of the legitimacy of a democratically elected government and a way to demonstrate governance to promote national interests (Seekings, 2017a cited in Hickey et al., 2018). In India, the MGNREGS demonstrated political commitment to strengthen the social contract between the state and citizens, while Peru's *Juntos* has been used to promote social cohesion as a way of redressing a legacy of political violence among impoverished communities (Holmes and Jones, 2013).



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However, with few exceptions, political elites have not had strong incentives to push for a *gender-responsive* social protection agenda. While critical moments in state formation are often a catalyst for women's political inclusion at the national level<sup>4</sup> – which can itself lead to more gender-responsive policies – promoting gender equality in social protection has not been seen as a solution to the kind of political threats or other motivating factors that have driven political commitment to social protection more generally.

In some cases though, political elites – especially women – have played a key role in promoting gender-responsive agendas within specific social protection instruments. In Chile, for example, during her first term (2006 to 2010), President Bachelet made significant progress on gender-equitable pensions and childcare policies (Staab and Waylen, 2015; Waylen, 2015). In India, female councillors in Bangalore actively promoted women's welfare issues through a widow's pension (John, 2007, cited in Nazneen and Mahmud, 2015). In Egypt, the new (female) Minister at the Ministry of Social Affairs relaunched the *Ain es-Sira* CCT pilot programme after it had been abandoned and deemed against the country's interests by the government at the time of the Arab Spring, in June 2013 (UN Women, 2015).

These are important examples, but small in number. And while there is increasing evidence on whether and how women politicians advance gender interests, there has been little research on social protection specifically. Most examples show that women representatives tend to express more concern over legal and social reforms, including domestic violence, reproductive health and women's welfare issues (Tripp, 2003; Goetz and Nyantui-Musembi, 2008, both cited in Nazneen and Mahmud, 2015). However, apart from some pensions and maternity reforms, such efforts have largely remained outside the social protection sector. Moreover, women and the political environments in which they operate are diverse; not all women want to focus on 'women's issues' or gender equality as this may put them at a disadvantage electorally, and not

all women leaders see it as their role to advance other women's interests. Class, faith, ethnicity, region and ideological persuasion all play a large role in determining whose interests are promoted by senior women politicians (Nazneen and Mahmud, 2015).

#### 4.2.2 Interests of government agencies mandated to deliver social protection

As discussed in section 4.1 on institutions, it should be easier to promote gender equality through national policies in countries where gender equality has been endorsed by senior party leadership and is embedded within the party ideology (Nazneen and Mahmud, 2015). However, whether formal endorsement translates into action depends on many other factors, such as the level of institutionalisation and the party's level of command and control centrally and locally (ibid.). In Rwanda, for instance, endorsement by President Kagame and the ruling party supported the promotion of women's representation and gender equality policies (Bunnet, 2008, cited in Nazneen and Mahmud, 2015). In South Africa, where the ruling African National Congress has been a strong supporter of gender equality, the recent decision to extend the Unemployment Insurance Fund to include domestic workers – most of whom are women – is seen as an important gender-responsive social protection policy.

Where social protection 'sits' within government also matters, as the lead agency for social protection plays a key role in shaping priorities (Holmes and Jones, 2013). Where there is no dedicated ministry for social protection, other ministries and departments lead on specific instruments, though this can lead to a fragmented approach. Where there is a ministry of social welfare or women and children, this ministry usually leads on social protection, though these are often among the weakest ministries in terms of power, resources and influence. Capacity constraints typically restrict effective coordination by these ministries with more powerful government agencies – therefore limiting their ability to build and implement a

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4 The political inclusion of women typically stems from their participation in independence or anti-colonial or anti-authoritarian struggles and armed conflicts (Nazneen and Mahmud, 2015).

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comprehensive and coherent gender-responsive social protection agenda (ibid).

In some cases, coordination mechanisms have been effective in overcoming fragmentation. In Rwanda, for example, a Social Protection Sector Working Group comprising government agencies, donors and NGOs meets regularly. The Ministry of Gender and Family Promotion participates in these meetings and has worked with ministerial allies and international agencies to secure gender-responsive features in the national social protection programme (Holmes et al., forthcoming). In Brazil, to overcome technical inefficiencies, the federal government's Single Registry for Social Programmes and the Extreme Poverty Plan have overcome challenges around duplication or exclusion of beneficiaries. The improvements in the system links women and their families with not only healthcare, education and other social assistance but also income insurance and access to services (Mello, 2017).

Conversely, weak coordination presents a major challenge to integrating gender into social protection programming, even in situations where government agencies' interests on gender may be aligned. In Bolivia, for example, the CCT programme, the *Bono Juana Azurduy*, highlights this disconnect. It was designed to deliver progress towards the Millennium Development Goals, and specifically to reduce maternal mortality and extreme poverty. Despite setting up a Social Protection Network to coordinate activities of various government departments, policies and programmes, neither the government's Gender Unit nor other women's agencies were consulted during strategic planning. As a result, women's rights issues were sidelined and the programme lacked any gender-responsive features (Castro, 2010, cited in Molyneux and Thomson, 2011).

Where a ministry of rural development leads on national social protection strategies, gender dynamics have historically been accorded low priority (especially in agencies focused on agriculture and rural development) (Holmes and Jones, 2013). Weak linkages with gender

focal points and a general dearth of funding for capacity-building for programme implementers continue to be major constraints to promoting gender equality.

Where a country has included gender-responsive components in programme design, these have often been to meet other objectives – as in Ethiopia, for example, where the Productive Safety Net Programme (PSNP) offered direct support to pregnant women to improve children's outcomes.

### 4.2.3 Interests of donors and international agencies involved in social protection

Donors and international agencies are influential actors in social protection at all levels, and especially in sub-Saharan Africa and some parts of Asia and the Pacific where programming is often heavily dependent on external funding. As such, these agencies' interests and ability to promote gender-responsive policies is critical to mainstreaming gender concerns in social protection (see also Box 4).

At the global and regional levels, a number of initiatives have promoted gender-responsive social protection. The Commission on the Status of Women in 2019 may be a catalyst to set a new precedent for gender-responsive social protection at the international level. The recommendations agreed by many member states support a strengthening of social protection systems to improve women's access to appropriate support. However, how such high-level political agreements are implemented at the national level remains to be seen.

In 2018, the Social Protection Inter-Agency Cooperation Board (SPIAC-B) working group on gender was established, which has called on governments and development partners to strengthen social protection systems to promote gender equality and empowerment. Donors have also funded various evaluations, studies and toolkits, such as the Food and Agriculture Organization of the United Nations' (FAO) work on gender and social protection, and The Transfer Project,<sup>5</sup> which researches the impact of cash transfers in Africa beyond economic

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5 The Transfer Project is a collaboration between UNICEF Innocenti, FAO, the University of North Carolina, UNICEF regional and country offices, national governments and local research partners.

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#### **Box 4 The role of international NGOs in influencing social protection policy and programming**

In some contexts, international NGOs – most notably Oxfam (the Hunger Safety Net Programme in northern Kenya), HelpAge International and Save the Children – have played a strong role in influencing social protection discourse. The latter two, given their mandates, have advocated for age-based social assistance, which has also coincided with donor and government interests to target older and younger people as groups with particular needs and capabilities. In the Philippines, for example, older people’s associations, with support from HelpAge International, successfully lobbied the government to introduce social pensions in 2010. These organisations drafted a social pensions bill, identified and approached potential sponsors in the legislature, and mobilised supporters to attend parliamentary committee hearings (HelpAge International, 2014).

International NGOs have also been active in piloting social protection schemes in a range of settings and endeavouring to show proof of concept, including in contexts of protracted crises. Until very recently, however, there has been a limited focus on promoting gender equality and empowerment objectives. Recent examples include programming by the ILO and HelpAge International on older women, and the International Rescue Committee’s (IRC) cash and gender-based violence prevention scheme in Jordan’s humanitarian response to the Syrian crisis.

indicators, including a focus on gender equality and empowerment.

Donors have also influenced specific national programmes. In Uganda, for example, the Ministry of Gender, Labour and Social Development has developed a gender and equality strategy with funding from DFID. The strategy recognises that many of Uganda’s social protection programmes are not gender responsive, and it aims to guide stakeholders to redress this (Government of Uganda, 2017). In Rwanda and Ethiopia, respectively, the Vision 2020 Umurenge Programme (VUP) and the PSNP are nationally owned programmes, but donors (including DFID, the World Bank, and UNICEF) have played a significant role in shaping policy debates. Both countries have improved attention to gender in social protection programme design in recent years, including providing direct-support alternatives to pregnant women on public works programmes, commitment to equal wages, flexible working hours and provision of childcare. These gradual changes reflect broader donor commitment to mainstreaming gender in programming and using gender-mainstreaming tools (including gender audits and analyses).

They also reflect a relatively consistent and continuous approach to promoting gender through a coalition of donors working towards shared goals.<sup>6</sup>

In other contexts where there has been less attention to gender, donors have focused on getting social protection onto the national political agenda. For example, in Zambia and Malawi, social protection programmes have focused on direct cash transfers to a small proportion of poor households (mostly targeting elderly people and families with children), leaving little space for discussion of more gender-responsive social protection measures.

Influential lead donors in social protection such as the World Bank have been criticised for paying limited attention to gender beyond targeting women as a ‘vulnerable group’. An evaluation of safety nets supported by the Bank, for instance, showed that programmes rarely considered gender differences in the design stage, including intrahousehold dynamics and ‘the gender-relevant context’ (IEG, 2014: viii). Gender analysis was also reported to be lacking within M&E frameworks, which are often limited to measuring numbers of female beneficiaries (ibid.).

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6 DFID Community of Practice on Social Protection discussion – January 2019.



Indeed, with a few exceptions, gender mainstreaming has yet to receive the resourcing that a more systematic approach would demand, especially by those donors leading on social protection (Holmes and Jones, 2013). DFID, the World Bank and the ILO, for example, have strong institutional strategies to support gender mainstreaming and women's and girls' empowerment, but they remain poorly integrated into social protection strategies or frameworks, if they exist at all.<sup>7</sup> This lack of an institutional social protection framework, strategy or approach which incorporates a strong focus on gender limits a comprehensive institutional response; it also limits the ability to monitor gender-responsive social protection in a coherent way across social protection instruments and within countries. As such, within the donor community, those focusing on gender and those focusing on social protection tend to remain disconnected. While UN Women has the most gender-focused mandate and its role in social protection is certainly growing (including in crisis contexts), it remains a relatively small player in the field.

These institutional and national challenges are compounded at the international level, where commitments on social protection call for the extension of coverage (including to low-paid workers in the informal sector) but have rarely applied a gender lens to programme design – for example, SDG 1.3 and ILO Recommendation 202 on social protection floors.

#### 4.2.4 Interests of civil society

While civil society actors (especially labour unions and, to a lesser extent, women's organisations) have played a critical role in advancing the welfare state in OECD country contexts, the role of civil society in general and of grassroots women's movements in particular in shaping

social protection discourse in the Global South has varied significantly.

Diverse civil society movements have succeeded in influencing policy through various strategies. In Bolivia, for instance, legislation to enact the universal pension scheme (*Renta Dignidad*) in 2007 (which benefited many women) was the result of strong mobilisation, coordination and cross-movement alliances, taking advantage of an opening of influencing space created by the left movement-based government of Evo Morales (UN Women, 2015; Anria and Niedzwiecki, 2016, cited in Alfery, forthcoming). In Thailand, the social movement that pushed for the 30-Baht (subsequently Universal Coverage) Health Scheme took advantage of a critical stage of the political cycle – a highly contested election. The scheme, which provided healthcare for all Thai citizens at minimal cost (and subsequently free), was promoted by an alliance between public health professionals, nine different social movements (including the labour movement and an organisation representing informal workers) and a political party (Nitayaramphong, 2011; Silva, 2015, cited in Alfery, forthcoming).

There are also a number of examples – especially from Latin America and South Asia – where domestic civil society actors and 'new' Unions<sup>8</sup> have been relatively influential in pushing for gender-responsive social protection features. Issue-based women's movements, for example, have created formal and informal strategies to mobilise around their work identity and demand higher wages, workers' rights and access to social security (see Box 5).<sup>9</sup> These strategies have often bridged the local and national divide and resulted in improving working conditions at the local level while also entering into negotiations in national policy

7 Note that UNICEF has a dedicated section on gender in a chapter on inclusive social protection in the UNICEF Social Protection Strategic Framework (UNICEF, 2012).

8 Kaber (2012) states that 'new unionism' is one recent form of organising to emerge which is more responsive to the needs and interests of working women, and which came about as a response to the growing presence of women workers in the export economy.

9 See, for example, the Self-Employed Women's Association (SEWA), Women in Informal Employment: Globalizing and Organizing (WIEGO) and the International Domestic Workers Federation (IDWF).

### Box 5 Strategies used by women's groups to influence policy

Women's groups have used a range of diverse strategies in different political and social forums to mobilise and negotiate gender equality issues. Nazneen and Mahmud (2015) identify a number of common strategies, including:

- building coalitions within the movement on particular issues
- forming alliances with other CSOs and the media
- targeting selective parts of the state bureaucracy, including local government, relevant ministries and the national gender machinery
- cultivating allies among women representatives and also among male politicians
- using international women's rights discourse/human rights discourse to package demands
- establishing and highlighting the organisation's expertise and experience on the specific issue(s) around which they are mobilising.

spaces (Nazneen and Mahmud, 2015). In India, for example, the Self-Employed Women's Association (SEWA) is one of the most famous examples of organising rural women workers across the informal economy, providing them with key services such as access to credit and savings, healthcare and childcare, as well as strategically linking women with government programmes and demanding women workers' rights (Saini, 2007). Again, in India, the Kagad Kach Patra Kashtakari Panchayat (KKPKP) is another example, in which the waste pickers' union (most of whose members are women) lobbied to get the municipal government to issue them with identity cards and extend the right to basic social security to informal workers (Chikarmane, 2012).

Over the past few years, there has also been a noticeable effort by women's movements and gender equality champions within CSOs, NGOs and member-based organisations/networks to promote access to childcare (see Box 6), including in social protection interventions and especially to help women access public works programmes.

Despite these positive examples of women's movements and civil society actors securing gender-responsive social protection features, divisions and internal power struggles have sometimes prevented women's movements having *greater* influence on social protection policies more often and at scale. At the national level, mobilisation around policy processes is often driven by women's groups whose members

are mostly professional, middle-class and elite women, who may not always represent the interests of grassroot women (Molyneux and Thomson, 2011; Basu, 2010, cited in Nazneen and Mahmud, 2015). And within issue-based coalitions and alliances, well-resourced national groups often dominate the agenda, further marginalising grassroots organisations (Alfers, forthcoming).

Other factors that have prevented women's movements from having greater influence at scale include the following:

- Women's mobilisation efforts around gender-responsive social protection tend to be localised, so do not even aim to influence national policy. Gender equality activists have been more prominent at the national level in areas of public debate, such as political participation and human rights/labour rights, rather than social protection (Holmes and Jones, 2013). In Peru, for example, the women's organisation *Movimiento Manuela Ramos* worked at the local level with members who were also beneficiaries of the *Juntos* programme, but had little formal contact with national programme officials and thus was unable to influence policy (Molyneux and Thomson, 2011).
- Local NGOs or women's organisations have increasingly been used as implementing arms of social protection programmes, which may limit their ability to push for transformation and leave them promoting other institutional

### Box 6 Mexico's flagship subsidised childcare system and links with civil society

Mexico's *Estancias Infantiles* programme (Federal Daycare Programme for Working Mothers) was launched in 2007, spearheaded by President Felipe Calderón, to reduce gender inequality and poverty by facilitating women's entry into the labour market. Targeting low-income mothers (and later single fathers) who were excluded from other early childhood education services, which covered workers in the formal sector and older pre-schoolers, *Estancias* was warmly welcomed by civil society actors.

The programme took a twin-track approach to improving women's access to employment. It offered individual women and CSOs cash grants to allow them to renovate and equip their homes or facilities to operate as safe daycare centres. And it subsidised up to 90% of the cost of childcare for working mothers (with children under 4 years). By 2012, *Estancias* was providing care for more than 330,000 children.

Evaluations have been positive, suggesting that the programme not only increases the likelihood of women's employment, but also increases stability of employment and incomes. It also significantly improves children's developmental outcomes, with better outcomes the longer the participation.

However, highlighting the importance of political dynamics in shaping social protection programming outcomes, these robust findings have not prevented Mexico's new administration from effectively closing down the programme as of 2019, arguing that there had been corruption in the delivery process and that some *estancias* were not performing adequately. Accordingly, the mode of delivery has been changed to direct transfers to mothers, children's grandmothers, aunts or individual daycare centres. Analysts are concerned that this approach will eliminate incentives for these centres to be put in place in marginalised locations that do not have alternative childhood services, which risks disadvantaging children in such contexts further.

The change in approach and reduction in value of the transfer has met with fierce opposition from women's organisations and NCOs. A press conference and joint communique by 17 organisations was sent to the government in early 2019 protesting the changes. The organisations have also criticised the changes for shifting responsibility for childcare back onto women and away from the state. It remains to be seen whether the Mexican government will listen to these voices from civil society.

Sources: Calderón (2010); Pereznieto and Campos (2010); Rizzoli-Córdoba et al. (2017); Staab and Gerhard (2010).

aims that may not reflect their own interests (Mostafa, 2011, in Sholkamy, 2012; Godsäter and Söderbaum, 2017). Moreover, resource constraints and shrinking political space are affecting women's movements' activities.

A recent report suggests that funding restrictions result in more activity directed towards women in their traditional roles as carers, rather than supporting women as political agents of change and pushing for transformation of gender relations (Wassholm, 2018).

- Formal trade unions – key actors in influencing social protection policy – are often male-dominated and exclude the informal sector, in which many women work. Moreover, traditional union activity generally fails to address women's practical and strategic issues (such as childcare, sexual harassment or unequal wages), explaining why there appear to be more opportunities through the issue-based coalitions mobilising around work (as described earlier).
- Even informal workers' networks have varied experiences in promoting a strong agenda on

gender-responsive social protection. To date, they have largely mobilised around childcare or local issues that are often more tangible, whereas many local networks do not fully understand the national social protection landscape, or what they can mobilise around and how to voice their demands.

- Finally, there is little evidence that non-state actors, civil society and citizens influence the design of social protection policy or hold donors and/or government accountable. A number of studies show that poor communities – and especially the most marginalised groups, including women – lack voice and therefore do not raise issues at community meetings or have power to influence local decision-making processes (Babajanian et al., 2014; Ayliffe et al., 2017; Kyoheirwe Muhanguzi, 2017).

## 4.3 Ideas

Political economy analysts emphasise the centrality of ideas (e.g. Hickey and Bracking, 2005) and how the framing of public policy discussions shapes policy and programming parameters. In the case of social protection, national systems reflect a wide range of ideas about poverty and vulnerability and their

underlying causes, as well as the purpose of social protection and the role of the state. When gender relations are added to the mix, ideas often play a particularly powerful role, as they are embedded in complex sociocultural norms surrounding understandings of family, care and social reproduction (Folbre, 2009; Holmes and Jones, 2013).

In this section, we focus on why ideas matter to efforts to promote gender-responsive social protection. We recognise that the framing of social assistance and subsidy programmes has often embraced the notion of what Molyneux termed ‘good motherhood’ (2006: 438), while pension and unemployment insurance programmes reveal a different set of discursive strategies (given that they have been designed primarily with a male breadwinner model in mind) (Holmes and Jones, 2013). Here we seek to unpack some of the nuances around the framing of specific programmes and the ways in which particular discourses often overlook or reinforce existing gender and age-based inequalities.

### 4.3.1 Ideas about rights

While the international community is increasingly framing social protection within a rights-based discourse, as enshrined within the SDGs (see Box 8) and the ILO Social Protection

#### Box 7 Ideas analysis - key points

- Social protection systems reflect a wide range of ideas about poverty and vulnerability and the role of the state in addressing these issues, which in turn shape programme design and implementation.
- These ideas often reflect complex gendered social norms that shape the value and expectations society attaches to women, the family, caring and social reproduction.
- Rights-based discourses are gaining currency in gender and social protection debates but tend to focus on the risks and vulnerabilities of working-age adult women (such as unequal access to contributory pensions), overlooking the needs of older women and adolescent girls.
- Human capital development discourses on social protection tend to dominate policy dialogues and cash transfer programming, but mostly focus on the first 1,000 days of life and on education, with limited attention to the multidimensional vulnerabilities of adolescent girls and boys.
- The discourse around productive activities, such as public works programmes, emphasises investments in community assets, but their framing is often not gender-responsive; even when schemes do conceptualise assets in more innovative and gender-aware ways, implementation is often poor.

### Box 8 Framing social protection through a human rights lens, but not a gender lens

Multiple international conventions buttress the right to social protection. Rights to an adequate standard of living and to benefit directly from social security, including social insurance, are enshrined in the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) (1979) (see Articles 3, 11, 14); in the Convention on the Rights of the Child (1989) (Articles 4 and 26); the International Covenant on Economic, Social and Cultural Rights (1966, 1976) (Article 9 and General Comment 19: the Right to Social Security (2007)); and the Convention on the Rights of Persons with Disabilities (2006) (Articles 1 and 28).

The Sustainable Development Goals (SDGs) echo this human rights-based framing of social protection, especially SDG 1, with target 1.3 calling for nationally appropriate social protection systems and measures for all, including floors, and by 2030 achieve substantial coverage of poor and vulnerable groups. However, while the SDGs include a strong emphasis on gender equality and empowering women and girls – not just SDG 5 on Gender Equality but 85 targets spanning goals on health (3), education (4), decent work (8) and justice (16) – discussions bridging gender and social protection are limited to women’s roles as caregivers and providing support for unpaid care and domestic work (target 5.4). While important, this target in isolation is inadequate to promote greater political traction around the importance of investing in gender-transformative social protection policies.

Floor, national social protection strategies, policies and programmes have not reflected the language of rights. There are important exceptions though: South Africa, where the right to social protection is enshrined in the Constitution; India, where the MGNREGS was framed in terms of the right to food; and Kenya, where the 2010 Constitution explicitly recognises the right to social protection. This partly reflects the often technocratic nature of national social protection debates and the relative absence of civil society actors, including women’s movements, in dialogues (Holmes and Jones, 2013). This lacuna is deepened by a trend towards NGOs’ involvement in providing direct services and the depoliticisation of women’s movements (Esquivel and Kaufmann, 2017; Sholkamy, 2012).

#### Rights versus harnessing caregiver support

Social protection programmes that seek to address gender-based vulnerabilities – namely large-scale cash transfer programmes targeting women as caregivers – have focused on helping women to cope better with the existing gendered division of household labour or, as Molyneux (2007) famously argued, promoting women as ‘mothers at the service of the state’. They have not been framed in terms of realising women’s

equal right to social protection. Moreover, social protection programming rarely recognises or addresses the challenges facing caregivers of particularly vulnerable individuals.

A partial exception is South Africa’s Zibambele Poverty Alleviation Programme, which recognises women’s care burden (especially around the HIV epidemic and care responsibilities for older persons) as part of women’s socioeconomic rights under the national Constitution. As part of its expanded public works initiative, the programme provides a direct grant to women-headed households previously excluded from the labour market for their care time. It also supports skills training, with the longer-term aim of supporting women’s economic empowerment.

Other significant disconnects between a rights-based framing of social protection and the realisation of girls’ and women’s rights include limited recognition of women’s disproportionate care burdens. This is reflected at programme level in cash transfers that have been conditional on children’s schooling (e.g. Mexico’s *Prospera*, formerly known as *Oportunidades*), accessing healthcare and maternal healthcare (e.g. India’s *Janani Suraksha Yojana* and the Philippines’ *Pantawid Pamilyang Pilipino Program* or ‘4Ps’) and nutritional service uptake (e.g. Peru’s *Juntos*),



as well as in programmes that are ‘labelled’ (i.e. explicitly linked to behavioural change expectations) to encourage parents to send their children to school as a way of avoiding child marriage (for girls) and child labour (for boys) (e.g. Ghana’s LEAP programme and Jordan’s Hajati labelled cash transfer). These transfers are typically targeted at mothers, who in turn bear responsibility for complying with the programme’s conditions; they often therefore reinforce women’s role as primary caregiver and are premised on the assumption that women’s time is expendable (Molyneux and Thomson, 2011).

We also see such gendered assumptions around care reflected in the design of social protection support for persons with disabilities and older persons. Jones et al. (2018) highlight that caregivers of adolescents with disabilities are overwhelmingly female and highly vulnerable to time poverty, social isolation and (in some cases) intimate partner violence. Moreover, such vulnerabilities also affect adolescent girls, who often shoulder domestic and care responsibilities alongside their mothers, which disadvantage them when it comes to secondary and post-secondary education and skills-building (Santman et al., 2016; Harper et al., 2018).

**Disconnects between gender and social protection across the life cycle** Few social protection programmes are designed to address the intersection of gender and age, though there is now growing attention to linking social protection with efforts to prevent gender-based violence. While Buller et al. (2018), in their systematic review, point to the emergence of a number of initiatives targeting adult women, Peterman et al. (2017) highlight that social protection programmes have paid scant attention to linkages with children’s vulnerabilities to violence and gender-based violence (see also Box 9). Analogously, while Help Age International and other organisations championing older persons’ rights have been active players in social protection dialogues, a gender lens is infrequently applied in such debates, including by the World Bank (Boeger and Leising, 2017).

**Social protection framing in humanitarian context – arguably even less gender-responsive** There is also a limited focus on rights discourses within social protection programming in humanitarian contexts, where attention to gendered vulnerabilities is particularly lacking (see, for example, FAO, 2016; Jones et al., 2017; Holmes, 2019). The European Union has recently developed a relatively small-scale but promising

### **Box 9 The invisibility of adolescents in social protection rights discourse**

Programming for younger people seldom focuses on the specific rights of adolescents in general, and adolescent girls in particular. For example, while there is a strong focus on social protection programming as a response to the HIV crisis, there is no such focus on adolescent girls and young women, despite the fact they face the greatest risk of infection and also their heightened vulnerability to care economy demands that could come at the cost of their schooling.

With the exception of Ghana’s LEAP cash transfer programme – which makes a passing reference to preventing human trafficking but takes no specific actions on this (Jones et al., 2010; Holmes and Jones, 2013) – we do not see any examples of social protection addressing salient issues for adolescents. For example, programming does not address the particular vulnerabilities that the ‘modern slavery’ agenda has drawn international attention to, and especially the risks facing adolescent girls and young women in terms of sexual exploitation (Presler-Marshall and Jones, 2018).

pilot project, to Enhance Rights and Protection for Forcibly Displaced Children and Adolescents in Guatemala, Honduras and El Salvador. It aims ‘to improve immediate and long-term protection responses for children and adolescents displaced by violence, persecution and violations of human rights’ and, alongside cash support, seeks to strengthen child protection systems at regional, national and local levels, including through ‘dignified child-safe spaces where girls and boys are safeguarded from all forms of violence, abuse, neglect and exploitation according to international standards’ (EC, 2017).

### 4.3.2 Ideas about human capital advancement

Discourses around investing in human capital as a means to tackle poverty and promote economic growth are widespread in national social protection strategies, as highlighted (for example) in Ghana’s emphasis on social protection as a means of enabling all citizens to contribute to the country’s middle-income aspirations.

This framing is also reflected in the World Bank’s social risk management approach, which emphasises individual income-related risks but overlooks the role of broader institutional inequalities (e.g. patriarchy and entrenched gender disadvantage, ethnic or caste discrimination, and the exclusion of people with disabilities from services and institutions) (Sabates-Wheeler and Kabete, 2003). In this way, even when social protection programmes do seek to promote women’s economic empowerment, they often do not challenge more structural labour market barriers. Instead, where women’s economic empowerment is embedded within some social assistance programme graduation approaches, there is often an emphasis on facilitating women’s small-scale entrepreneurship through access to micro-credit (e.g. Ethiopia’s PSNP and the Bangladesh Chars Livelihoods programme). However, as McCord and Slater (2014) point out, it is questionable whether ‘all beneficiaries have the capability or desire to be

entrepreneurs or business people’, and in order to promote women’s equal rights to economic opportunity, they may instead need access to paid employment. In short, this narrow focus precludes a more transformative intervention.

### Human capital investment discourses generally favour the first 1,000 days of life, but are expanding to include the second decade

In terms of the life cycle, human capital investments generally focus on the first 1,000 days of life, and include promoting access to prenatal and postnatal care, nutritional supplements and birth registration, and subsequently primary school enrolment. However, there is very little focus on older children – for example, linking cash transfers with adolescent-friendly health services.<sup>10</sup>

There are, however, some programming modalities that seek to advance human capital by addressing the specific vulnerabilities facing adolescent girls, and by incentivising behavioural changes. These include: (1) interventions that aim to keep young girls in school, particularly at secondary level (e.g. Mexico’s *Prospera* gave higher payments to beneficiary households to keep girls in secondary school, while Bangladesh’s Female Stipend Programme targets adolescent girls to support the transition from primary to secondary school); and (2) programming which incentivises girls to avoid risky sexual and reproductive health behaviours (e.g. Malawi’s Zomba cash transfer, aimed at delaying first sexual debut, improving bargaining power with partners, and avoiding reliance on transactional sex and sugar daddies) (Baird et al., 2011) and to delay marriage (e.g. India’s *Apni Beti Apna Dhan*) (Nanda et al., 2016).

### 4.3.3 Ideas about productivity and community assets

Another set of important ideas in social protection discourse involves going beyond the micro-household level and encouraging investments in community-level assets through

10 This invisibility of adolescents in the ‘social protection for human capital advancement’ discourse is also reflected in the fact that in seeking to understand the effects of social protection on youth, a number of the programme evaluations by The Transfer Project involved an assessment of the spillover effects of general household-level social protection initiatives, rather than exploring adolescent-focused programming.

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public works programmes. Such programmes provide individuals and/or families with cash and/or food for work that typically involves developing necessary but underfunded community infrastructure (e.g. water harvesting, roads and terracing, school buildings and health clinics) (Antonopoulous, 2007), and, more recently, services such as early childhood development or childcare centres. Assets selected are typically not gender-responsive, although there are exceptions. In Ethiopia, for example, donor pressure to mainstream gender in the PSNP and promote women's empowerment led (at least in the design documents) to provisioning to invest in water points and fuelwood sources (to reduce women's and girls' time poverty). It also allows for public works labour to support

female-headed households with ploughing (a proscribed task for women). However, because these efforts were largely externally driven at the time, with little uptake by the Ministry of Agriculture and Rural Development, implementation has been patchy at best.

Nevertheless, we are starting to see cases where the definition of community assets is being expanded to include not just tangible assets but also investments in community knowledge and behavioural change. Examples include the provision of community education on nutritional practices and dietary diversity, coupled with training in basic gardening and animal husbandry, awareness-raising around HIV and protective measures, as well as around maternal and child health.

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# 5 Conclusions and policy implications

While there has been progress in recognising the role of social protection in addressing gendered risks and vulnerabilities – especially related to childcare – most social protection initiatives in LMICs do not routinely address gender issues across the life cycle, nor do they explicitly promote women’s and girls’ empowerment through a more transformative approach. Where gender *is* considered in social protection policy discourse, it is often in the context of the complex sociocultural norms surrounding understandings of family, care and social reproduction, which firmly locate women as mothers and carers first and foremost. As such, programming often fails to adequately address the multiple needs of women and girls and the risks they face.

Gender analyses of social protection have largely focused on technical aspects of design and implementation as a means to advance gender equality and women’s empowerment. However, given limited progress in achieving transformational change, it is critical to understand the political economy factors that either help or hinder using a gender lens. We have used the ‘three is’ political economy framework – institutions, interests and ideas – to understand not just the bottlenecks but also the opportunities for making social protection programming and policies more gender responsive.

Our analysis shows that institutional arenas and networks (formal and informal), the interests of various actors and the ideas framing social protection strategies and programmes all represent sites for contestation around legal change and policy and resource allocation decisions that shape how social protection addresses gender equality and empowerment. The particular features of institutional spaces,

for example, mirror the nature of the underlying political context in terms of how inclusive they are, and the specific opportunities they offer for gender equality activists to drive more gender-responsive social protection agendas.

Moreover, the extent to which gender-responsive social protection is promoted depends on the interests and strategies of a wide range of actors and institutions. But even where interests are aligned, key gender equality activists may not be able to influence policy if they lack resources and influencing power. Prevailing ideas within national social protection systems about poverty, vulnerability and the role of social protection in promoting a more transformative agenda also shape programme design and implementation, as well as the extent to which social protection tackles gender inequalities or promotes empowerment and more gender-equitable relations.

In sum, while each country context is unique, our findings suggest that a number of features and approaches can help integrate gender into social protection policies and programming:

- Where pro-poor and inclusive national government institutions combine with influential political elites advocating for gender-responsive social protection. Informal decision-making arenas and sub-national institutions also often hold the greatest promise for change.
- Where a coalition of actors – from government, donors and development partners to civil society locally and nationally – are advocating for gender-responsive social protection, sustained over time, and ready to take advantage of any opening up of policy spaces.

- Where coalitions of actors have the technical and other capacities to frame social protection in national and local debates as a way to address the risks and vulnerabilities facing women and girls, and to promote a more transformative and rights-based agenda.

## Implications for policy and programming

Our analysis and conclusions suggest that to advance a gender-responsive social protection agenda, donors and development partners should distinguish between transformative *intent* of social protection components and their transformative *impact*. By ‘transformative impact’ we mean outcomes that change gender power imbalances and structural inequalities, whereas ‘transformative intent’ refers to a progressive approach to achieving gender equality and empowerment objectives (which recognises constraints due to the political context or other factors).

Donors and development partners should commit to social protection that has transformative intent by:

- ensuring that social protection is, at a minimum, gender-sensitive
- ensuring that social protection includes transformative elements, addressing underlying gender inequalities and discrimination
- monitoring and documenting transformative intent and impact over time, to identify the critical levers for promoting gender equality and women’s and girls’ empowerment and identifying barriers to change.

Embedding a political economy analysis into the design and implementation of social protection ‘problem-definition’ will ensure best use of existing opportunities, structures and capabilities for change.

Adopting problem-driven and adaptive approaches in programme design and implementation ensures that, from the outset, actors can take advantage of opportunities to maximise the transformative potential of social protection programming – and recognise the limits of what is politically possible (see O’Neil, 2016).

## Priority actions

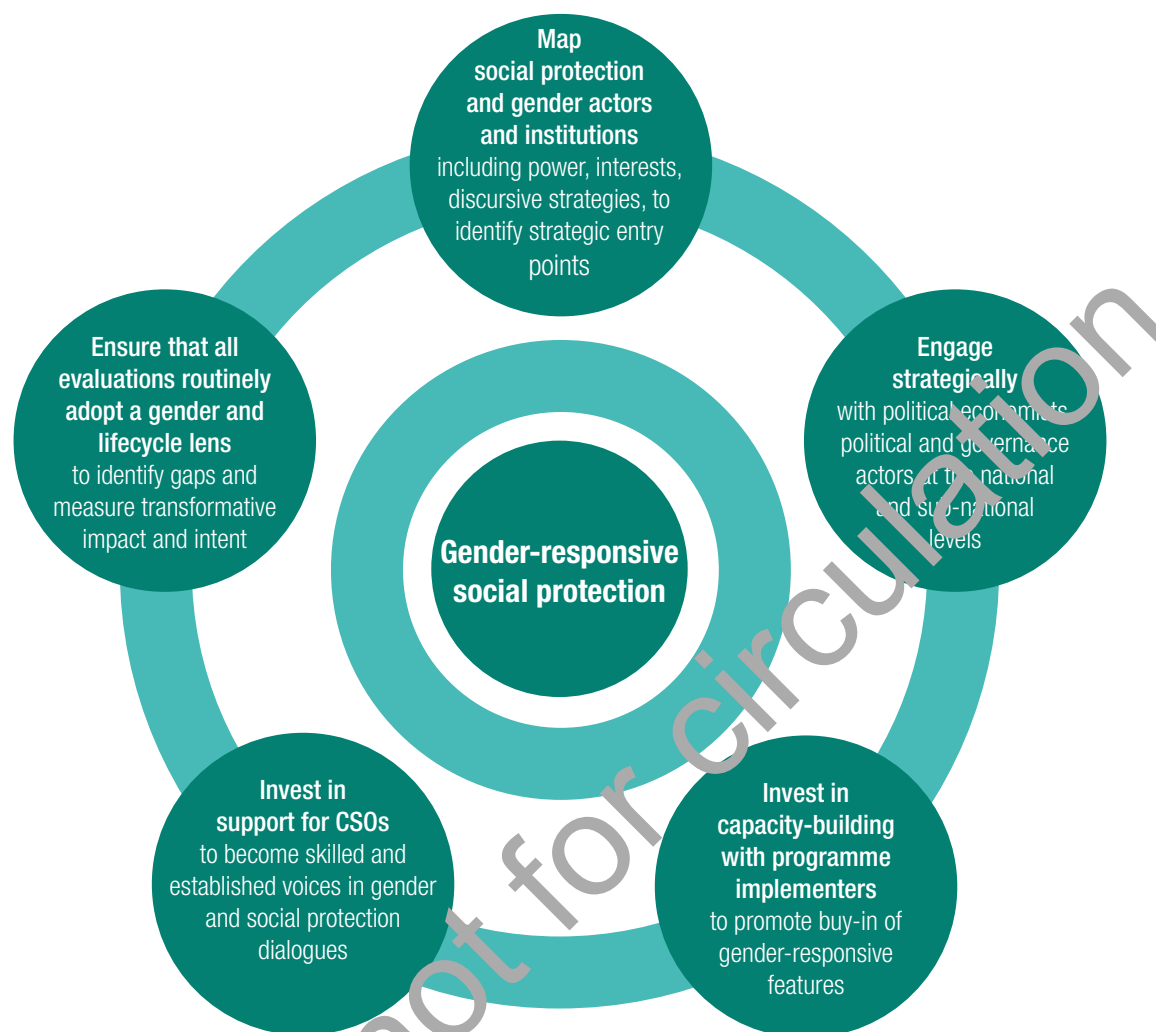
In this context, we propose five priority actions to enable social protection actors to engage in more politically savvy ways to improve gender-responsive and transformative social protection programming intent and impact (figure 1).

### Map social protection and gender actors and institutions in each context, including power, interests and strategies, to identify strategic entry points, particularly at sub-national and informal institutional levels

As the politics of gender-responsive social protection are so diverse and context-specific, a detailed mapping of social protection and gender actors and institutions in each country will help understand their relative power, interests and ideas. It should:

- identify strategic alliances among diverse actors at the national and sub-national levels (state, NGOs, private sector, community-based organisations, religious institutions, etc.)
- frame social protection programming aims and approaches using context-sensitive and resonant concepts and language
- identify the priority institutional arenas – e.g. national or sub-national, cross-party legislative alliances, or legal mobilisation/legal change strategies – for achieving transformational change
- understand how informal institutions operate in the different institutional arenas to inform donor efforts. Where clientelism or patrimonial politics dictates decision-making and resource allocation, actors may need to tap into less visible decision-making spaces at national or sub-national levels.

**Figure 1 Five priority actions**



**Engage more strategically with political economists, political actors and governance actors at the national and sub-national levels to inform and promote politically savvy negotiations about gender-responsive social protection design and implementation**

There is a need for systematic investment to track how efforts to drive more gender-responsive social protection navigate different institutional spaces, and how the interests of actors and prevailing ideas shape social policy.

A robust political economy analysis should underpin social protection policy, programming (design and implementation) and operations (systems) from the start. This would help planners to move away from pre-set solution-driven approaches, and to think more strategically about existing institutional

power dynamics. This analysis should involve operational and implementation teams who have much more detailed knowledge about how institutions, interests and ideas intersect at the national, sub-national and community levels. This would also help identify potential blockages and effective solutions and opportunities to integrate gender into social protection policies, programmes and systems, including identifying key political actors (e.g. elected politicians, parliamentary groups, etc).

While investing in political economy analysis is an important first step, embedding gendered political economy expertise throughout programme design (or redesign) and implementation can help identify critical opportunities to push for a more

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gender-responsive agenda (transformative intent) by, for example:

- developing staff skills and knowledge of gendered political economy approaches
- bringing national political expertise into social protection programming at critical points of the programme cycle to identify how to take a more transformative approach.

Ideally, this approach would look across social protection systems rather than focusing only on one specific instrument, to avoid challenges linked to fragmentation.

**Invest in capacity-building with programme implementers to deliver gender-responsive design features and to promote buy-in to deliver gender-transformative programming**

The examples in this paper suggest that implementation of gender-responsive social protection features is weak, partly due to the persistence of patriarchal norms across institutional structures, interests and ideas. There needs to be significant investment in a range of areas to overcome this structural challenge:

- capacity-building to deliver gender-responsive design features, and increase awareness, knowledge and skills for the implementation of gender-transformative social protection programming
- using political economy analysis to strategically frame commitments to gender equality and responding to backlash
- sensitisation of all actors involved in implementation (including local implementers and recipients) of gender-responsive features
- create incentives for implementation, which may include, for example, gender-, age- and diversity-responsive responsibilities in programme implementers' formal job descriptions, so as to promote positive buy-in
- supporting appropriate accountability mechanisms
- monitoring implementation.

**Invest in support for gender-focused CSOs to become more established voices in social protection dialogues, supporting the skills and resources needed to engage in national discussions on social protection**

With few exceptions, women's movements have not had a strong voice in social protection policy debates beyond a few specific programmes (mainly pensions, maternal benefits and provision of childcare). Evidence from a few countries shows that gender-focused CSOs can play an important role in supporting gender-responsive social protection. Yet they face increasing funding challenges and restrictions on their activities. Governments and other key actors, including donors, need to create and incentivise more space for civil society voice and participation in social protection dialogues at national level. This is also a key recommendation from the Commission on the Status of Women (2019), which argues for the 'full, equal, effective and meaningful participation and leadership of women at all levels of decision-making in the design, development, implementation, monitoring and evaluation of policies', alongside the engagement of men and boys as agents and beneficiaries of change.

Actions could include:

- linking women's organisations and civil society groups to networks with experience of working on social protection (e.g. WIEGO), and linking social protection/poverty-focused civil society groups to women's organisations and national platforms on gender equality and women's and girls' rights
- engaging with women's CSOs to help them participate in social protection dialogues and think strategically about the framing of gender-responsive social protection and what terminology may most resonate with their supporters/members
- insisting on CSO representation (including grassroots organisations) in social protection dialogue and design at national level

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- supporting women to directly engage with social protection providers through, for example, specifically targeting women with tailored information campaigns and training representatives to support women's participation (Ayliffe et al., 2017)
  - supporting women to engage with political representatives and the media.

**Ensure that all programme evaluations routinely adopt a gender and life cycle lens to identify gaps and gains, and measure transformative impacts as well as intent**

Despite improvements in the evidence base on gender and social protection, progress has largely been limited to capturing differences between men and women in terms of outputs (e.g. coverage, benefits received). Few social protection programmes routinely include a gender analysis of outcomes or impacts in their M&E, so we still know little about what works, and much of the programming relies on assumptions.

Gender analyses are therefore critical for identifying and informing context-specific social protection design and implementation, and to support the case for gender-responsive social protection more generally. Given limited progress, donors should make programme funding contingent on this type of disaggregation, in line with the Leave No One Behind 2030 agenda.

Donors should:

- invest in comparing different social protection models and approaches: M&E should be thought of as a portfolio of evaluations, rather than fragmented evidence from individual programmes
- ensure that monitoring includes measurements related to transformative impact as well as transformative intent
- embed learning to document change processes and feed back into programme design and implementation.

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