

MEASURING GENDER EQUALITY RESULTS: THE PD AND OTHER WAYS

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Summary:

Despite being on the international development agenda as a programmatic commitment for over 30 years and with a good number of multilateral, bilateral and private development institutions in addition to many international non governmental organisations pursuing the cause, gender equality and women's empowerment have still not been fully achieved in most parts of the world as in Africa. This paper argues that this is partly because of the way that gender equality has been measured.

In March 2005 a declaration was signed in Paris now popularly called the Paris declaration, which has become the lighthouse document for aid effectiveness currently shaping the contours, architecture and discourses of global aid. Major reviews of the Paris declaration suggest that the narrow focus of the Paris declaration on efficiency and structural reforms of aid delivery mechanisms has limited positive impact on development or aid effectiveness in general and gender equality in particular however it provides a useful new way for measuring results.

This paper will provide early tools for making the implementation, monitoring and evaluation of development aid as proposed by the PD framework and borrowing from the Results Based Management paradigm accountable for gender equality results.

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Introduction

For over three decades assertive programming in human rights, social justice and in particular women's rights have generated and expanded the literature and instruments, created a number of global and local institutions and, above all, popularised the notion and language of (universal and attainable) human rights. The investments have been massive and in many instances the gains have been significant. Among some of the many gains of these investments are the attempts at measuring the gap between men and women also referred to as gender discrimination. A number of tools, indicators and indices have been developed, the more popular among them being the Human Development Report's Gender Development Index – GDI and the Gender Empowerment Measure –GEM as well as the UNECA Africa Centre for Gender and Social Development's African Gender and Development Index - AGDI.

The most important global framework for gauging development efforts in contemporary practice is the Paris Declaration. The PD is currently the guiding framework for Aid Effectiveness. Made in March 2005, this declaration with targets for the year 2010 is shaping the contours, architecture and discourses of global aid. But this important instrument for assuring worldwide development is insensitive to gender.

This paper will provide a new way of measuring gender equality results in development practice by using the framework offered by the PD while introducing elements that go beyond the limitations imposed by the static or confounding nature of single yet complicated indices such as the GDI, GEM or AGDI. It offers a new framework that guarantees that the whole spectrum of actions can be monitored and their results measured from the lens of gender equality and societal transformation.

Background

Five global conferences, miles and miles in international treaties, declarations and documents, hundreds of thousands of advocates spread across the globe, millions possibly billions so far spent and an international United Nations women's Fund (not a whole agency mind you!) yet gender equality, social inclusion and poverty eradication still elude international development. Why? It is generally acknowledged that paying attention to gender equality is important for development. UNDP (2002) states, as do many institutions of global importance that, *'Because equality between women and men is just, fair and right — it is a worthy goal in and of itself, one that lies at the heart of human development and human rights. And because gender inequality is an obstacle to progress, a roadblock on the path of human development. When development is not 'en-gendered' it is 'en-dangered'.'*

A whole truckload of reasons can be advanced to explain why more gains have not been the hallmark of development practice's engagement with gender equality and equity. The argument being advanced in this paper is that the tools and therefore the measurements have been misguided or at the very least off beam. The other reason is related to the fact that most of the hundreds of miles of international treaties, protocols, conventions and the like have had very little by way of structured measurable targets or indicators as integral parts of the documents to support their measurability. The Millennium declaration changed this trend by introducing measurable targets and indicators for the MDGs. This valuable tradition has been followed by the PD and this has resulted in two successful monitoring surveys in three years - a laudable

achievement. Before this tradition was established, institutions charged with reporting development progress had to devise ways to do so.

Gender Development Index

In 1995, the Human Development Report created and used two tools- the GDI (gender-related development index) and the GEM (gender empowerment measure) for measuring gender equality conceptualized as gender discrimination. Since then these two indices have become the popular way that gender gaps are measured. They have also been catalytic in the development of other indices e.g. the AGDI. UNDP reports that Country Offices are increasingly issuing National Human Development Reports (NHDRs) and these indices to advance gender equality programming (UNDP, 2002). The respected national reports put out by Social Watch use these indices among others.

Although very popular in discussions and attempts at measuring gender dimensions of development impact, there are acknowledged problems and limitations with using the GDI in this manner. Stephan Klasen, Professor of Economics, at the University of Göttingen in 2006 observed and stated that;

The GDI is a measure that adjusts the Human Development Index by gender inequalities in the three dimensions covered by the Human Development Index, i.e. life expectancy, education, and incomes. It is therefore important to note that the GDI is "not" a measure of gender inequality as such. To see the importance of gender gaps in human development, one can use the ratio of the GDI to the HDI or the difference between the two.

The GEM seeks to measure relative female representation in economic and political power. It thus considers gender gaps in political representation, in professional and management positions in the economy, and in earned incomes.

The GEM is probably a conceptually clearer measure and more easily interpreted but also has two primary shortcomings ...related to earned incomes and ... the rather complicated way of how the gender gaps are...calculated...'

It is unclear how much better the AGDI fares on these dimensions but probably not much better because the major difference in the AGDI is the qualitative African Women's Progress Score card. The Gender Status Index uses similar dimensions and indicators to assess social, economic and political power although it purports to simplify the measuring and weighting problem which is one source of the complication with the GDI.

The limitations of these indices are real and relate to one major drawback which probably holds the key to the reason why so little has been achieved to date; they are all measuring or rather showing the state of difference. At the risk of sounding simplistic they do not show how this difference can be changed through policies, actions, instruments of governance. This is precisely where the Paris Declaration is different and in a real sense better.

The Paris Declaration¹

The Paris Declaration is a statement, adopted at a High Level Ministerial Forum (HLF) on March 2 2005. The HLF, organized by the Development Assistance Committee (DAC) of the OECD, was attended by Aid Ministers from 22 OECD donor countries, representatives of international organizations, recipient developing countries and 14 civil society organizations. Over 100

¹ The full text of the Paris Declaration can be found at <http://www.oecd.org/dataoecd/11/41/34428351.pdf>

partner governments, bilateral and multilateral donor agencies, regional development banks, and international agencies—endorsed the **Paris Declaration on Aid Effectiveness**, thereby committing to actions that would promote the effective use of aid funds.

The declaration consists of three sections namely; the statement of resolve, partnership commitments, and indicators of progress. Much of the discussions and contentions to date have revolved around the 5 principles that underlie the partnership commitments: - ownership, alignment, harmonisation, managing for results, and mutual accountability. The statement of resolve highlights the *raison d'être* of the declaration, as the scaling up of aid, and identifies the management and implementation processes of the new approach, including adaptability to differing country situations, the targets and their timelines. It also suggests a monitoring and evaluation schema. Two monitoring and evaluation exercises have been completed since the PD was endorsed in 2006 and 2008.

The second section, of the PD contains the 50 partnership commitments for the 5 principles of ownership, alignment, harmonisation, managing for results, and mutual accountability. The commitments and thus expectations are partner specific so that the responsibilities are clear. The numbers of commitments vary for each of the five principles with Alignment having the largest number of commitments. There is no balance between partner country commitments and those of donors for each principle.

The final section of the PD is the Indicators of Progress Table consisting of the 12 **indicators** and the targets to be achieved for each of them by the year 2010. For each of the 5 principles, one or a set of measurable indicators has been identified; Ownership has one indicator, # 1; Alignment has nine indicators, # 2a&b,3,4,5a&b,6,7,8; Harmonisation, two indicators, #9 &10; Managing for results, one indicator #11;and Mutual accountability also has one indicator, #12. It has been suggested, on account of the heavy emphasis on the principle of Alignment, as shown by the number of indicators attached to it that the PD is principally an instrument for improving the efficiency of aid not necessarily for its effectiveness.

The PD is currently seen as the guiding framework for Aid Effectiveness in some quarters whereas for the others it has become the new benchmark separating outsiders from insiders, those who comply from those who do not. It has been described by the OECD (2007) as;

'An ambitious attempt to increase the impact of aid on development by promoting more mature partnerships between donors and partner countries. It also seeks to enhance partner countries' ability to manage all development resources more effectively; and enable their citizens, and parliaments, to hold governments accountable on its use. As well as committing all parties to the Declaration to a clearly specified set of actions and behavioural changes, it also calls for periodic monitoring at the country level, so that the governments of developing countries and their external partners are increasingly accountable to each other for the progress being made' (OECD, 2007, Chap 3).

The PD has also been described as “*an unprecedented global consensus for reforming the delivery and management of aid to improve its effectiveness... in reducing poverty and inequality, increasing growth, building capacity and accelerating achievement of MDGs*”, (<http://www.therealityofaid.org>).

The PD thus speaks to both aid “givers” and “takers” in a new political strategy aimed at dealing with the conduct of both as a means of ensuring that aid does indeed lead to genuine development and the transformation of lived lives. But many of the major reviews of the PD to date suggest that the narrow focus on efficiency and structural reforms of aid mechanisms will have a limited positive impact on development effectiveness in general and gender equality in

particular (DCD/DAC, 6-2006, 7). The PD does however attend to the mechanisms, structures and processes that could lead to the gender gaps purportedly measured by gender development indices, and provides a veritable means (framework/indicators) of measuring these but it fails to take cognisance of the fact that development is a process which could lead to different results mediated by gender. So now what?

All the major reviews of the PD (OECD-DAC (2006), UNIFEM (2006), CIDA (2006) while pointing out that it fails to deal adequately with gender equality, acknowledge that it offers excellent opportunities for the insertion and/or incorporation of gender equality dimensions in Aid Effectiveness.

Engendering the PD

The process of engendering the PD is well underway and has been happening at various levels, locations and spaces and although all the sections of PD require and are possible candidates for engendering, this process has to date been most developed for the commitments. The immediate output of the Accra High Level Forum on Aid Effectiveness i.e. the Accra Agenda for Action² can be considered one product of engendering since mention of the words ‘gender equality’ have gone from one solitary instance in the PD (paragraph 42) to two in the AAA (paragraphs 3 & 13). Other engendering efforts though less high level, and perhaps on account of being so, have been a bit more successful. The rest of this section is devoted to describing one such effort and the results.

In 2006, as a direct consequence of recommendations at a number of meetings and consultations on the New Aid Modalities as they had become popularly known then, UNIFEM created an African expert group to interrogate this new terrain and suggest how gender equality would best be achieved within the new landscape dominated by the Paris Declaration. The Africa Gender and Development Evaluators Network (AGDEN) was invited to join this group to contribute specifically in the area of developing gender sensitive indicators and tools for use in the monitoring and evaluation of the new aid mechanisms.

AGDEN, working as a member of the UNIFEM Africa expert group produced a set of gender sensitive indicators together with an accountability and assessment framework for gender equality of the Paris Declaration and other aid instruments. The indicators developed as part of the work of the expert group as well as the PD targets were reviewed and revised by AGDEN at a PD workshop held in Nairobi in March 2007. The revised AGDEN-PD indicators were presented at the African Women’s Regional Consultative Meeting on Aid Effectiveness and Gender Equality held in Nairobi in May 2008 and again at the 6th GENDERNET meeting in Paris in July 2008 where the opinion was expressed in certain quarters that they are too many.

The Table below shows the full set of AGDEN gender sensitive PD indicators. For each of the 12/14 PD indicators between one and four gender sensitive indicators have been suggested. The

² The full text of the Accra Agenda for Action can be found at <http://siteresources.worldbank.org/ACCRAEXT/Resources/4700790-1217425866038/AAA-4-SEPTEMBER-FINAL-16h00.pdf>

reason is to give users, at this stage, the freedom for experimentation to try possible indicators so as to ascertain their evaluability or measurability in order to efface some of the problems identified with other measures. Some of the indicators still require more work at polishing and AGDEN believes that the widespread use and trial of these indicators by evaluators and researchers will make them better, useful, useable & popular- more than some of the current instruments used in the PD M&E surveys.

TABLE 1
AGDEN Gender Sensitive Paris Declaration Indicators

Current PD Principle & Indicator #	Gender Sensitive Indicators
<p>1 OWNERSHIP Operational development strategies with strategic priorities linked to a medium – term expenditure framework and reflected in annual budgets.</p>	<ul style="list-style-type: none"> ▪ <i>Percentage of participation of men and women in the development of national plans and strategies</i> ▪ <i>Percentage representation of women and poor women and men’s interests in national plans and strategies</i> ▪ <i>Percentage/degree of representation and reflection of women’s human rights and international conventions and agreements in national strategy documents</i>
<p>2a ALIGNMENT Quality of public financial management systems</p>	<ul style="list-style-type: none"> ▪ <i>Degree of Gender responsiveness of Country financial systems</i> ▪ <i>Degree of Reform of Country Procurement systems to reflect gender sensitivity if /where need is proven</i> ▪ <i>Presence of national gender budgeting efforts</i> ▪ <i>% of Gender analysed national (or sectoral) budgets</i>
<p>2b Quality of procurement systems</p>	<ul style="list-style-type: none"> ▪ <i>Quality of Gender sensitivity of Country Procurement systems</i> ▪ <i>Gender responsive reviews of Country procurement systems</i> ▪ <i>% of Gender analysed national expenditures</i>
<p>3 Aid flows reported on national budget</p>	<ul style="list-style-type: none"> ▪ <i>% of Aid flows with strategic gender equality objectives reported in national budget reviews/reports</i> ▪ <i>% of Aid flows which support gender equality objectives (extra budgetary) reported.</i> ▪ <i>Quantity of Aid flows channeled to gender sensitive sectors reported as a proportion of those to other sectors</i>
<p>4 Co-ordinated capacity support</p>	<ul style="list-style-type: none"> ▪ <i>Existence of a coordinated/national framework for capacity development of government functionaries in Gender and Development</i> ▪ <i>Quality of capacity-development support provided to gender equality and women’s groups, gender equality</i>

		<i>advocates and national women's machineries</i>
5a	Use of country procurement systems	<ul style="list-style-type: none"> ▪ <i>Ease/difficulty of use of procurement systems in support of GE programming</i> ▪ <i>Degree of understanding of ease/difficulty of procurement systems by GE programmers</i>
5b	Use of country public financial management system	<ul style="list-style-type: none"> ▪ <i>Ease/difficulty of use of public management systems for GE programming at national, provincial, local government, city levels</i> ▪ <i>Degree of understanding of public management systems by GE programmers at all levels</i>
6	Parallel implementation units (PIUs)	<ul style="list-style-type: none"> ▪ <i>Percentage use of PIUs for gender equality programming as a proportion of PIUs for other aid</i>
7	Aid predictability-	<ul style="list-style-type: none"> ▪ <i>Percent of aid disbursed for gender equality work released according to agreed schedules in annual or multi-year frameworks as a percentage of other/overall aid to country</i>
8	Untied Aid	<ul style="list-style-type: none"> ▪ <i>Percent/proportion of bilateral, multilateral or other aid tied to women's rights and gender equality conditionality as a percentage of aid with OTHER conditionalities</i>
9	HARMONISATION Use of Programme Based Approaches	<ul style="list-style-type: none"> ▪ <i>Number & types of PBA arrangements in country</i> ▪ <i>Number and types of sectors in country using PBAs.</i> ▪ <i>Proportion of aid in GE PBAs as a percentage of overall PBAs in other programme areas or sectors.</i> ▪ <i>Number and quality of programmes supporting women's human rights and gender equality programming in country</i> ▪ <i>Number and type of sectors in which projects supporting women's human rights and gender equality are found</i>
10	Joint Missions and country analytic work	<ul style="list-style-type: none"> ▪ <i>Nature of collaboration among key development agencies and national government in the development of joint national gender equality strategies</i> ▪ <i>Existence of Joint assessments/country analytic work in GE</i> ▪ <i>Degree of involvement of gender advocates and women's organisations in Joint assessments/country analytic work</i>

11	<p>MANAGING FOR RESULTS Performance/Results oriented frameworks</p>	<ul style="list-style-type: none"> ▪ <i>Existence of performance assessment frameworks for national strategies sensitive to GE i.e. with gender sensitive indicators</i> ▪ <i>Number and quality of CEDAW related indicators included in national/sector Performance assessment frameworks</i> ▪ <i>Number and types (quality) of implementation reports prepared and disseminated on CEDAW, BPFA, and gender equality as stand alones or reflected in national strategy reports presented to parliament or the general tax paying public</i>
12	<p>MUTUAL ACCOUNTABILITY Partner countries undertake mutual assessment of progress</p>	<ul style="list-style-type: none"> ▪ <i>Number and quality of timed reviews/assessment of progress in the implementation of agreed gender equality and women's human rights commitments</i> ▪ <i>Degree of involvement by gender advocate, women's rights activists, and CSOs in the timed reviews and assessment of progress in the implementation of agreed gender equality and women's human rights commitments</i> ▪ <i>Degree, quality and regularity of CSO involvement in performance monitoring and reporting of Aid Effectiveness for gender equality.</i> ▪ <i>The existence of parliamentary mandates for requesting and receiving vertical and horizontal monitoring, evaluation and performance reports of Aid Effectiveness for gender equality by governments, donors and I/NGOs</i>

In a sense the work of engendering the PD has only just begun with the AGDEN indicators as well as those developed by other e.g. UNIFEM/ILO/EU and to a smaller extent with the commitments in the AAA. The text of the Triple A although different from the Paris Declaration does not overtake, override or overwrite the PD. The former only reasserts the latter (Etta, 2008). What this means for gender equality advocates is more work at engendering, in addition to the rest of the PD, the AAA.

Beyond the PD, the work of interrogating aid effectiveness from a gender equality perspective with which AGDEN has been involved has generated a results oriented framework for measuring not only outcomes but the entire results chain from inputs to outputs and impacts. The Gender Equality Assessment Framework for Aid Effectiveness (**GEAF**, Etta, 2007) is a results-oriented assessment framework which can be used to undergird any monitoring or evaluation exercise sensitive to issues of gender equality and women's rights.

Why **GEAF**?

Fleming et al., assert that '*none of the assessment frameworks of the PD explicitly incorporate the monitoring of gender and social equity*' (2007, 17). The instruments currently used for assessing the Paris Declaration in the two surveys to date (September 2006 and 2008) depended

on; a survey questionnaire, the World Bank Comprehensive Development Framework, country reports, Aid Effectiveness Review, and Country Policy and Institutional Assessments (CPIA), as well as OECD DAC Procurement reports. There is general consensus that these instruments being instruments of international agencies and for whatever other reasons are neither publicly available nor easily understandable by the by the general public. Only those (often senior) individuals directly implicated in the monitoring surveys have access to them. These individuals are often in national ministries of finance and or national development. But even they on occasion have owned up that they do not fully understand the instruments. Thus the very first principle of the PD itself is being breached if a broad section of country nationals cannot engage in monitoring it if they so wish for whatever reasons. There is thus the need for new ways to democratise the measurement of aid in the letter and spirit of the Paris Declaration on Aid Effectiveness.

The other reason for GEAF is the slow but increasing acceptance of the role that civil society can and does play in development. With particular reference to the PD, it is foreseeable given the new clauses (paragraph 20) in the AAA which give recognition to the agency of civil society that civil society could, using a framework such as the GEAF prepare reports which would be tabled at the next high level forum on aid effectiveness. The existence of a framework that can guide, frame and or harmonise this kind of work is useful.

What is **GEAF**?

The **GEAF** framework is constructed as a simple monitoring and evaluation plan. It identifies the monitoring or evaluation issues or priorities at four levels- input, output, outcome and impact. The corresponding expected result for each of these levels as well as their indicators, sources of information, methods etc are also identified.

Level 1 or the input stage is concerned with Aid flows. At this level the desired results are increases in aid volumes targeting the 'right' programmes, sectors, projects or institutions which work on women's issues and rights. The indicators are the amounts or volumes committed or disbursed, their origins and destinations.

The business of Level 2 i.e. the output level is the entire Paris Declaration. The 5 principles are regarded as the monitoring or evaluation issues with 12 PD indicators and the corresponding gendered indicator set. The expected results at this level are aid efficiency and effective aid management. It can be argued that not all the PD indicators are suitable for this level.

Strategic support for gender equality is treated in the GEAF as fitting at the 3rd or outcome level of the framework. The desired results at this level of the GEAF would be genuine gender mainstreaming where all sectors, projects etc receiving aid irrespective of their nature, sector or objective, routinely use and apply gendered tools and techniques and monitor gendered pictures of their influences with the collection of gender disaggregated data being one of the most rudimentary results.

At the 4th and highest level i.e. impact level, the transformation of gender relations, more equitable sharing and control of and benefits from resources would be the expected result. The issues are broad development dimensions of education, politics as well as economic activity and

employment. The indicators borrow from the Africa Gender and Development Index as well as others and these indices really belong at this level of analysis.

It is evident that at the lower levels – input and output- the place and role of aid is very visible but at the higher levels –outcome and impact – the fact that aid is effective ought to translate into more global development outcomes so much so that the direct contribution and thus attributions of change from the effects of aid and of growth may become increasingly difficult to disentangle. It is for this reason that the indicators at this level appear less and less tied to aid.

The GEAF is still being tested. We invite you to join this movement to make aid more effective for men as for women so as to reach genuine development and thus social and economic transformation, (GEAF to be distributed).

Conclusion

New ways of measuring gender disparity that go beyond mirroring the status of gaps between men and women at any point in time must be found. It is important to move in this direction because measuring gender differences at the level of impacts with traditional indices e.g. GDI and AGDI and the results they generate are difficult, if not limited, for providing meaningful interpretations of possible causes and in their utility for modeling change that can help dissolve the gaps.

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