



Gender Analysis Guide
**Office of the Special Representative for Women,
Peace and Security**

NATO HQ

Contents

| | |
|--|----|
| Summary of this Guide | 4 |
| Section 1. Glossary..... | 5 |
| Section 2. Introduction to Gender Analysis | 8 |
| 2.1 What is Gender analysis? Objectives and goals | 8 |
| 2.2 Why Gender Analysis matters to NATO? | 8 |
| 2.3 Who is this guide intended for? | 9 |
| Section 3. How to approach Gender Analysis..... | 10 |
| 3.1 Gender analysis terms..... | 10 |
| 3.2 Basic components of Gender Analysis | 10 |
| 3.3 Applying a gender perspective..... | 12 |
| 3.4 Summary of key points..... | 13 |
| 3.5 Learning Exercise – applying a gender perspective | 14 |
| Section 4. Undertaking Gender Analysis..... | 15 |
| 4.1 Asking fundamental gender questions | 15 |
| 4.2 Mapping the situation: what information exists and where are the gaps? | 18 |
| 4.3 Framing gender questions..... | 20 |
| 4.4 Methodologies for Gender Analysis..... | 20 |
| 4.5 Outputs: what gender analysis can and should provide? | 21 |
| 4.6 Summary of key points..... | 22 |
| Section 5: Summary and Conclusions | 23 |
| 5.1 Overarching take away points from this Guide | 23 |
| 5.2 Essentials & good practice checklist/ summary..... | 23 |
| Section 6: Appendices..... | 24 |
| Appendix 1: Introduction to basic Gender Theories | 24 |
| Appendix 2: Applying a gender perspective to data analysis | 25 |
| Annex 3: Mapping Tool Template | 28 |

Acknowledgements: This Guide has been based on two key documents, ‘Gender Mainstreaming in Practice: A Toolkit’ (2007, United Nations Development Programme) and ‘Gender based Analysis: A Guide for Policy-Making’ (1998, Status of Women Canada). With thanks and appreciation for permission to use and adapt materials herein.

Summary of this Guide

The Guide is presented in six sections:

1. Glossary

Before introducing gender analysis, the glossary section provides definitions and explanations of the most commonly used gender terms such as ‘gender mainstreaming’, ‘gender perspective’, ‘gender-neutral’. It seeks to demystify the terminology associated with gender, providing examples from NATO to ground what gender-terminology means in practice at NATO.

2. Introduction

This section provides an introduction to gender analysis and explains **what** gender analysis is, **why** it matters to NATO and **who** this guide is intended for.

3. How to approach gender analysis: necessary components

Gender analysis (whether in a policy development or programming context) should not be rocket-science. However, in order to apply a gender perspective to the interpretation of data, it does require a basic understanding of gender theory, described here, alongside the ‘What-Why?’ and ‘So What?’ principles of gender analysis.

4. Undertaking Gender Analysis

In a policy making context, undertaking gender analysis starts by asking fundamental gender questions, mapping the situation (to determine what information exists and where the gender data gaps are), before refining the research focus and selecting an appropriate research methodology. These key steps are discussed in this section.

5. Summary and conclusions

The final section highlights the main conclusions to undertaking gender analysis and includes an ‘essentials and good practice’ checklist to following during policy development.

6. Appendix

Applied learning exercises based on hypothetical scenarios, to accompany this Guide, are included as appendices.

Section 1. Glossary

There is a lot of ‘lingo’ attached to gender. Terms such as ‘gender mainstreaming’, ‘gender perspective’, ‘gender-sensitive policy’, ‘gender-bias’, ‘gender neutral’ are frequently referenced but often, not-understood or misinterpreted.

Below, a glossary of terms that are used in this Guide, with some examples of what they mean in practice.

Gender: Refers to the social attributes associated with being a female or male, which is learned through socialisation and how society/culture interprets what is permissible for women and what is permissible for men. Gender determines what is expected, permitted and valued in a woman or in a man, in a given context.¹

Rather than being determined by biology, gender is learned. It is, therefore, distinct from sex, which refers to the biological difference between male and female bodies.

Gender norms: Gender norms (e.g. the qualities, behaviours and attitudes traditionally associated or deemed appropriate for ‘men’ and for ‘women’) include such stereotypes as ‘men are violent / women are peaceful’, ‘men are strong and rational / women are weak and emotional’, ‘men as breadwinner / women as homemaker’. Gender norms aren’t fixed, they differ across cultures/societies and can change over time. They are pervasive.

Example of harmful gender norms in an operational context: Assuming all military-age men to be potential or actual militants or combatants entrenches the idea that men are violent and thus targetable. This devalues male life—it suggests men are relatively more expendable than women. It increases the vulnerability of men, exacerbating other risks adult civilian men face such as forced recruitment, arbitrary detention, and summary execution.

Gender equality: The equal rights, responsibilities and opportunities of women and men. Gender equality does not mean that women and men will become the same but that **an individual’s rights, responsibilities and opportunities will not depend on whether they are born male or female.**²

In most societies, there are differences and inequalities between women and men in responsibilities assigned, activities undertaken, decision making opportunities and access to and control over

¹ Concepts and Definitions WPS in NATO, Office of NATO’s SGSR for WPS, page 9

² *ibid*, page 14

resources. Women are mostly adversely affected by gender inequalities and **gendered inequalities unquestionably affect access to the potential benefits of international security.**

Gender mainstreaming: A strategy used to achieve gender equality by **assessing the implications for women and men of any planned action**, in all areas and at all levels, in order to ensure that the concerns and experiences of both sexes are taken into account.³

Example of gender mainstreaming in the area of Small Arms and Light Weapons (SALW) at NATO:

Over recent years, the Arms Control and Coordination Section (ACCS) of PASP at NATO has initiated a process to mainstream gender in SALW related activities. What this means in practice is **recognition and understanding of:**

- **the different roles that women and men** play in relation to SALW;
- **the different effects of violence** perpetrated by SALW on women and men; and
- **due consideration of the impact – on women and men – of** NATO's SALW control initiatives.

Gender perspective: The consideration of gender-based differences between women (and girls) and men (and boys) as reflected in their **social roles and interactions**, in the **distribution of power** and the **access to resources**.⁴ (*also referred to as gender dimension or gender lens*).

The inclusion of a **gender perspective** in the **planning process** enables policymakers to understand gender inequalities when planning an intervention, thereby avoiding perpetuating them during the implementation of a policy, programme or project, and achieving better results.

Example of gender perspective in NATO's Policy for the Protection of Civilians:

NATO's Policy for the Protection of Civilians (2016) is a good demonstration of the inclusion of gender perspective, in which:

- **the gender-based differences in the protection needs and vulnerabilities of civilian women, men, girls and boys are recognised**, as per Clause 7: *'children [in general] constitute a particularly vulnerable group during conflict and women are often disproportionately affected by violence'*;
- **understanding the gendered nature of threat against civilians** is emphasised, as per Clause 16: *'By identifying the threats, including type of perpetrators, their motivation,*

³ NSO, The Official NATO Terminology Database

⁴ *ibid*

*strategies and tactics, capabilities, and the expected outcome for civilians, including through a **gender-sensitive approach***, NATO planners [...] would recommend military response actions for NATO and NATO-led operations, missions [...]*

Gender-sensitivity: A 'gender-sensitive approach' means acknowledging that the differences and inequalities between how women and men are affected by a given situation (policy or action), requires attention.

Gender neutral: Gender-neutral policies are not specifically aimed at either men or women and are assumed to affect both sexes equally.⁵

Gender neutral policy making is problematic – experience shows that men and women often have different needs and priorities – no least in relation to security and defense, and that opportunities provided by policies and the policy outcomes deemed 'gender neutral', often affect groups of men and women unequally.

Gender blind: Gender-blind policies are often based on information derived from men's activities and/or assume those affected by the policy have the same (male) needs and interests.⁶

In a military-defense context, consider research and design of military personal protective equipment, based on the 'average' male soldier. Gender-blind design of body armor can prove fatal for female soldiers deployed on combat operations.

⁵ Neimanis, 2007: 126

⁶ RBEC, U., 2007. Gender Mainstreaming in Practice: A Toolkit.

Section 2. Introduction to Gender Analysis

2.1 What is Gender analysis? Objectives and goals

Gender Analysis is the starting point for addressing the gender dimensions of any given issue or intervention to mainstream gender.

It directs those involved in policy making to consider what the relevant gender issues are in the context of the policy/programme in question and what data is available (i.e. on gender inequalities).

“Gender Analysis is the critical starting point for gender mainstreaming; the first step in a mainstreaming strategy is the assessment of how and why gender differences and inequalities are relevant to the subject (policy) under discussion.” (UNDP, 2016:3)

When integrated into the general policy assessment process, gender analysis can be used for a number of reasons including:

- i) to ensure that men and women are not disadvantaged by any particular policy or strategy;
- ii) to identify priority areas for action to promote equality;
- iii) to assess gendered differences in participation or resource allocation;
- iv) to build capacity and commitment to gender equality.

Crucially, by comparing how and why women and men are **differently affected by policy issues**, it challenges the assumption that everyone is effected by policies (programmes/ actions) in the same way, regardless of gender - a notion often referred to as 'gender neutral' policy.

“The goal of gender analysis is to improve the position of the gender group which is in a less favorable position and that is why gender analysis is important in planning policies and programmes.” (Gender Analysis: Possibilities of Application in Security Sector, Brozovic 2012:3)

2.2 Why Gender Analysis matters to NATO?

- **NATO has made gender equality a core policy commitment:**

At the opening of the 2019 NATO Committee on Gender Perspectives, NATO Secretary General Jens Stoltenberg re-emphasised how: *‘Gender equality is an integral part of all NATO policies, programmes and projects [and that] gender should be at the centre of planning, doctrine and training.’*

The NATO/EAPC Women, Peace and Security (WPS) Policy and Action Plan (2018) reflects an ambitious commitment to mainstream gender internally in the institutions of NATO through the integration of WPS Agenda in its institutional policies and strategies. To realize this ambition, **gender analysis is a critical starting point**.

- **Security and Defense Policies that fail to consider the potential gender implications on women and men can lead to [unintended] negative consequences.**

NATO is a pivotal security sector institution whose purpose is to guarantee the safety and security by political and military means of the populations of its members, partners and allies. To help ensure its defense and security strategies identify and respond to the broad range of safety and security needs of these given populations of women, men, girls and boys, it is imperative that NATO's security policy-making includes gender perspectives. **Gender analysis is critical to this.**

*'Where (security) policies are gender-blind, they may both directly and indirectly condone gender-based violence against women, men, boys and girls; gender inequality and exclusionary practices. This in itself requires that policy-making processes are inclusive and incorporate the perspectives of **all groups** in a given population.'* (National Security Policy-Making & Gender, DCAF series, Tool 8, p5)⁷

2.3 Who is this guide intended for?

This Guide is intended for use at NATO-HQ by those involved in **developing and supporting policy development**. This includes:

- NATO International Staff actioned to draft policy at the request of the Office of the Private Secretary or the Nations;
- Political teams of the National Delegations involved in negotiating policy;
- Divisional-level WPS-Focal Points who are responsible for advising/ leading in gender-related tasks in their Divisions;
- WPS Office staff providing gender advice and guidance in the policy development process.

Policy development is by no means an objective undertaking. Who leads the process, what depth of analysis and research is undertaken, in which focus areas and who is consulted - all of these factors shape policy making and can lead to gender considerations either being valued and integrated in policy formation or undervalued and overlooked.

All too often, gender is considered as an afterthought in policy formation. However, if NATO is to meet its gender equality commitments (described above) this is a status-quo that needs to be redressed.

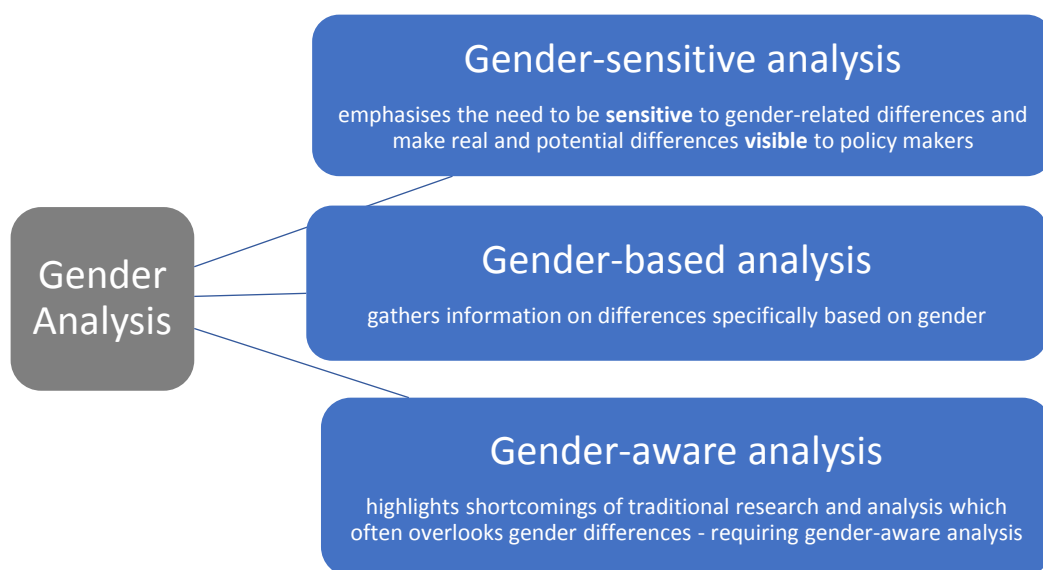
Therefore, this Gender Analysis Guide is intended as an introductory tool to help promote more **systematic** gender analysis by policy makers at NATO-HQ and foreground gender considerations in policy formation.

⁷ Ibrahim, A.F., Mbayo, A.S. and MCarthy, R., Integrating Gender in Security Sector Reform and Governance.

Section 3. How to approach Gender Analysis

3.1 Gender analysis terms

Gender analysis can also be referred to as **gender-sensitive analysis**, **gender-based analysis** and **gender-aware analysis**. Each term emphasises a slightly different aspect of gender analysis but follow the same principle, namely, that of assessing the different impacts of a given policy or action on men and women, and revising the policy or action accordingly, so as to promote gender equality. Gender analysis terms are often used interchangeably.



3.2 Basic components of Gender Analysis

Any type of gender analysis consists of three necessary components



1. Sex-Disaggregated Data

Refers to data (qualitative or quantitative) that clearly distinguishes between data applicable to women and data applicable to men. It can include statistics, survey or interview results, or other basic information. By way of a hypothetical example:

| Data that are not disaggregated by sex | Sex-disaggregated data |
|--|---|
| 96 applications were received for a forthcoming NATO position in the Defense Investment Division. 25 (of 96) were shortlisted for interview. | 96 applications (72M:24F) were received for a forthcoming NATO position in the Defense Investment Division. 25 (of 96) were shortlisted for interview (22M:3F). |

! Note on the importance of disaggregated data: Sex-disaggregated data is vital to gender analysis - as is data disaggregation by **other identity factors** such as age, race, class, nationality, ethnicity, sexuality (etc). **Women and men are not homogenous groups.**

2. Analysis

Refers to the interpretation of that data by asking **‘What does that information mean?’**. For example, the following provides a basic interpretation of the above data:

| Analysis |
|--|
| The male to female ratio of applicants is 3:1. Three times as many men applied to this position, as did women. |
| The male to female ratio of shortlisted candidates is approximately 7:1. Just over seven times as many men were shortlisted, as women, to this position. |

3. Gender Perspective

While the above analysis notes the **difference** between men and women, it does not analyse the causes or consequences of this difference. Adding a gender perspective - in other words, **interpreting data according to established theories about gender roles, relations and equality**, is crucial so that the analysis can be used for better policy formulation and decision-making. Consider the following two-interpretations of the given example:

| Analysis of gender differences that does not consider established theories about gender relations | Analysis that includes a gender perspective based on established gender theories |
|--|--|
| <p>Far fewer women applied because women simply aren’t interested in working in the defense sector and don’t have the required skills and experience.</p> <p>The caliber of applications from men was generally much higher which explains why only a handful of female candidates were shortlisted.</p> | <p>The security sector is typically a male dominated sector and presents a major challenge for equal opportunities for women.</p> <p>In such contexts, women face a significant number of barriers to entry, starting with recruitment practices which can put many women off from applying for new positions.</p> <p>Depending on the T&Cs of employment, requirements to work long, anti-social hours can be especially prohibitive to women. While men and women both need to balance the demands of work and home life, women still bear the primary responsibility for domestic duties, child and elder care, in most</p> |

| | |
|--|--|
| | <p>households. The conflict between work and family obligations is more acute for women than for men.</p> <p>In job sectors traditionally dominated by men, women potentially lack sector specific experience; alternative, transferable skills and experience gained in other sectors, may be discounted. Furthermore, requirements e.g. prior experience working in an international military environment (though not an essential requirement to the job in question) will almost certainly favour male applicants, as men still predominate in the military.</p> <p><i>“What you see, is what you can be”</i>: In traditionally male dominated sectors, web-communications, job adverts, messaging and visuals are often male-centric, depicting male values and interests, which are exclusionary to women and other, traditionally excluded groups.</p> <p>Unconscious bias affects both the language of job descriptions and undoubtedly influences shortlisting.</p> |
|--|--|

4. The ‘What-Why?’ and ‘So What?’ principles of gender analysis:

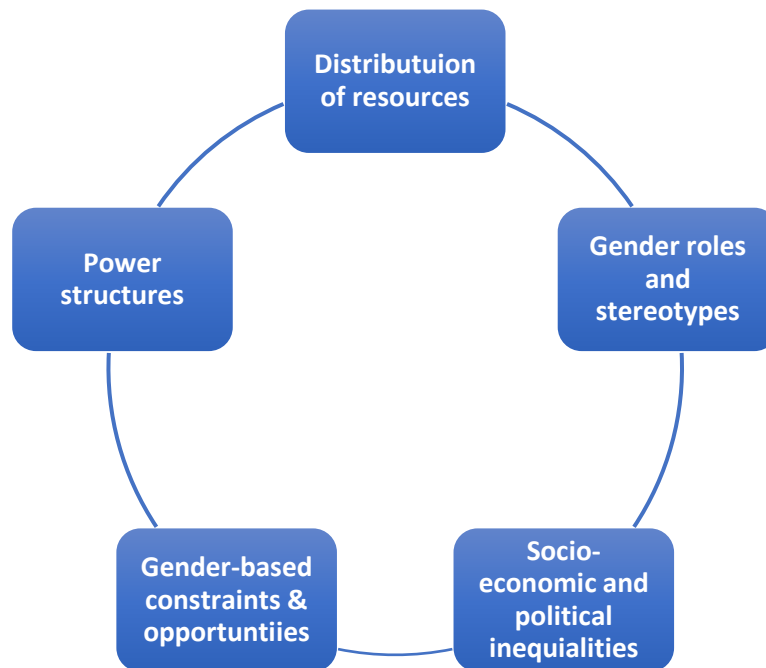
In this example, analysis that includes a gender perspective infers a number of gender-specific barriers to recruitment that explain the marked discrepancy in numbers of male to female applicants. This is the **‘What-Why?’ principle of gender analysis**. Good gender analysis goes beyond simply describing a given situation and suggests **why** the situation is as it is.

Based on research findings, gender analysis can then be used to suggest measures (general or specific) for **changing the situation**. This is the **‘So What?’ principle of gender analysis**. Without suggestions and recommendations to accompany the research findings that can influence policy formation and **redress gender-based inequalities**, undertaking gender analysis becomes meaningless.

3.3 Applying a gender perspective

Applying a gender perspective does require a basic understanding of gender theories, for instance, how social norms and power structures impact on the lives and opportunities available to different groups of men and women. In most societies, there are differences and inequalities between women and men in responsibilities assigned, activities undertaken, access to and control over resources, as well as decision-making opportunities.

Broadly, gender theory acknowledges the historical and social inequalities faced by women and considers:



For an introduction to basic gender theories, see [Appendix 1](#).

If policy planners lack a basic understanding of gender theories, meaning that competent analysis of data from a gender perspective **cannot be guaranteed**, it is imperative that ‘gender stakeholders’ are identified and consulted. Among the ‘gender stakeholders’ at NATO-HQ include the WPS Office team, divisional WPS-Focal Points and those policy-making colleagues from Delegations who are known gender advocates.

It is also important to stress that you don’t have to be a gender expert (per se) to integrate gender perspectives in policy planning or programmes and should not feel overwhelmed by the task. **If in-depth gender based analysis of a technical area is required, outsource this to experts.** Otherwise (for the most part) applying a gender perspective is about running through a checklist of key questions to ensure you have not overlooked anything.

3.4 Summary of key points

- Gender analysis consists of **three necessary components**:
 - (1) sex-disaggregated data
 - (2) basic analysis
 - (3) analysis from a gender perspective
- In order to apply a gender perspective, **all policy planners** should have a basic understanding of gender theories.
- If competent analysis of data from a gender perspective cannot be guaranteed (either because policy planners lack basic understanding of gender or the policy topic/domain is highly technical), **commission a gender expert**.

- Good gender analysis should answer the ‘What-Why?’ and ‘So What?’ questions; its overarching objective is to improve design and planning of policy in order to prevent a negative impact on gender equality and to strengthen gender equality.

3.5 Learning Exercise – applying a gender perspective

EXERCISE 1: ANALYSIS OF DATA ON HUMAN TRAFFICKING FROM A GENDER PERSPECTIVE

Instruction:

Based on the sex disaggregated data provided on human trafficking⁸ (Box 1) undertake:

1. Basic analysis of this data;
2. Applied analysis of this data from a gender perspective.

Box 1: Sex-disaggregated data

- In 2016, an estimated 40.3 million people were victims of human trafficking, **21% of whom were men, 49% women, 23% girls and 7% boys.**
- Trafficking for the purpose of sexual exploitation was the most predominant form of global trafficking, accounting for 54% of all forms of trafficking. **Females represent 96% of victims trafficked for sexual exploitation.**
- About 4 in 10 victims detected between 2012 – 2014 were trafficked for forced labour, and out of these victims, **63% were men, predominantly in construction and fisheries.**

EXERCISE 2: ANALYSIS OF DATA ON LANDMINE VICTIMS FROM A GENDER PERSPECTIVE

Instruction:

Based on the sex disaggregated data provided on landmine victims⁹ (Box 2) undertake:

1. Basic analysis of this data;
2. Applied analysis of this data from a gender perspective.

Box 2: Sex-disaggregated data

- In 2017, 5,617 civilians (**740F: 4,874M**) were killed or injured by antipersonnel and antivehicle landmines, including improvised landmines, as well as unexploded ordinance.

See [Appendix 2](#) for responses to the exercises and additional examples.

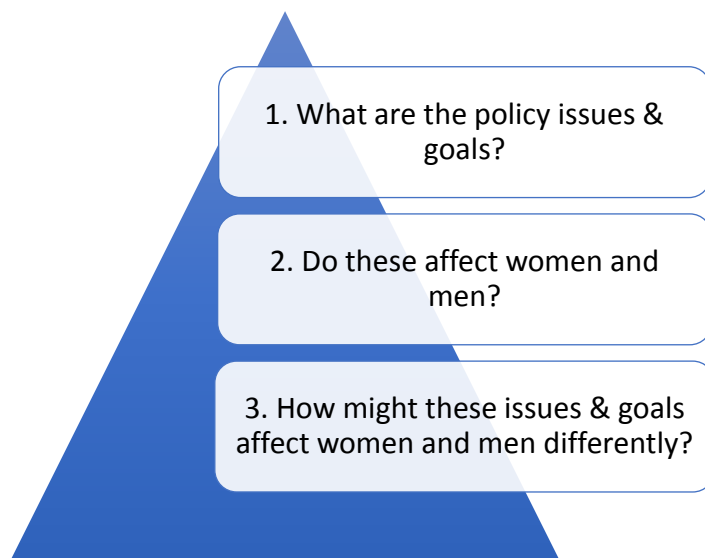
⁸ Source of data: ICAT The Interagency Coordination Group against Trafficking in Persons Issue Brief #4

⁹ Source: <http://the-monitor.org/en-gb/reports/2018/landmine-monitor-2018/casualties.aspx>

Section 4. Undertaking Gender Analysis

4.1 Asking fundamental gender questions

In a policy making context, gender analysis starts by asking three fundamental questions:



If the answer to question 2 is no, in other words the policy issues and goals **will not** affect women and men, then gender analysis is obviously superfluous. There are examples of this from NATO where **the 'human terrain' is not considered** and where the gendered impacts of policy - whether on women or men, don't come into the equation.

An example of this is the '**Enhanced NATO Policy on Cyber Defense (2014) Action Plan**', which is principally a 'technology piece' dealing with the internal management of NATO's Cyber Defense, the focus of which is on protecting NATO systems not people, per se. Typically, however, it would be surprising for a policy issue to have **no effect** on people, male or female.

Also, assuming the policy issues/goals **do affect women and men** it may be tempting to simply state that '*a policy is not likely to have differential gender effects*' – or in other words, that the policy is 'gender neutral'. **Rarely (if ever) is this the case.** Take these range of examples from civilian as well as security specific contexts:

- **Example 1: Policy standards on explosive weapons**

How policy standards on explosive weapons must consider differential gendered impacts:

Policy standards on explosive weapons (such as bombs, rockets, mortar and artillery shells) may not appear to have a significant gender dimension, in as much as **explosive weapons will have serious consequences on all civilians regardless of one's gender.**

However, as research and analysis demonstrates, explosive weapons used in populated areas do have **significant differential gender effects**, which must be analyzed and understood when developing policy standards.

From datasets that disaggregate by gender, it is possible to discern that explosive weapons appear to disproportionately harm men, in terms of immediate casualties. Conversely, women appear to be disproportionately affected by the numerous indirect consequences of explosive weapons, including damage to healthcare infrastructure, mass displacement and the education system.

The devastation and impact of explosive weapons use clearly reverberates beyond immediate casualties and are experienced differently, depending on demographic factors. Of these, gender plays a significant role.

- **Example 2: Snow-clearing**


How a municipal snow-clearing policy affects the lives of women and men differently and why it is a gender equality issue:

It might be surprising to think that a policy on municipal snow clearance has a gender dimension – one might presume that any such policy would affect both sexes equally.

Not so. In the Swedish city of Karlskoga, city officials included a gender perspective when reviewing its policy on snow clearance; it revealed that clearing the main highways first benefited car drivers, more of whom tended to be men, rather than footpaths and cycle paths, more often used by women. Authorities explained that the system did not intentionally discriminate against anyone, rather that it was simply being carried out "**as it always has been**".

In response, the city introduced new measures, first snow ploughing the streets and paths around daycare centres, then areas around the largest workplaces and schools, before moving on to office districts and main roads. The result? Gender-neutral snow clearing with **fewer injuries and reduced socio-economic costs**, since statistics show that each year in Sweden, pedestrians are three times more likely than motorists to be injured in icy weather.

That's just one example of what can happen when policy makers consider the **different impact of everyday policies on women and men**.

-  **NOTE: It is vital to consider the anticipated gender dimensions of policy issues and goals early on, in the policy planning process. All too often, gender is considered as an afterthought in policy formation.** Asking fundamental questions from the outset (to recap):
1. What are the policy issues and goals?;
 2. Do these issues and goals affect women and men?;
 3. How might these issues and goals affect men and women differently?

will help signpost the **relevance of gender** to the policy domain in question and ensure that gender issues are assessed (alongside other factors), planned, researched and resourced accordingly.

- **Hypothetical example: Advanced Military Personal Protective Equipment (PPE):**

| | |
|---|--|
| <p>EXAMPLE</p> | <p>Take this hypothetical example on the development of policy on Advanced Military Personal Protective Equipment (PPE).</p> |
| <p>In this hypothetical example, there is an identified need to upgrade military PPE for military personnel deployed on NATO-led missions, operations and actions. Military PPE is an important part of military gear that is used for protecting troops. It includes protective body armor, garment ensembles, footwear covers, gloves, and helmets among others items. Military PPE is specifically designed to protect military personnel from chemical and biological hazards during a combat situation.</p> <p>Fundamental questions have been asked from the outset (listed below), indicating that gender is a relevant factor to be analyzed (alongside other factors) when formulating this policy. In summary:</p> | |
| <p>1. What are the overarching policy issues & goals?</p> | <ul style="list-style-type: none"> - Issues: Current PPE needs upgrading; ongoing volatile situations in countries where NATO is engaged and an increased threat in the use of chemical and biological warfare, has augmented demands for advanced military PPE. - Overarching goal: To ensure military personnel are equipped to the highest standard with PPE that provides enhanced protection, functionality and performance. |
| <p>2. Do these affect women and men?</p> | <ul style="list-style-type: none"> - Yes: male and female-serving military personnel are deployed on operations; gender is a relevant factor to be analyzed (alongside other factors) when formulating this policy. |
| <p>3. How might these issues & goals affect women and men differently?</p> | <p>The ways in which policy on advanced PPE for military serving personnel might affect women and men differently have been identified as follows:</p> <ul style="list-style-type: none"> - PPE will need to respond to the different physiologies of male and female-serving military, including gender specific health risks of exposure to chemical and biological attack; - Anticipate current/potential inequalities in the design/supply/provision of suitable PPE for male and female-serving military; |

| | |
|--|--|
| | <ul style="list-style-type: none"> - Lack of suitable PPE (for either male or female-serving military) may impact training/ ability to deploy/ duties assigned). <p>⚠ NOTE: At this point, defining in what ways women and men are differently affected will be an approximation. Clarifying the precise gender dimension of the issues/policy goals will require further research as part of the gender analysis.</p> |
|--|--|


4.2 Mapping the situation: what information exists and where are the gaps?

Having begun the process of identifying likely or potential ‘gender issues’ to the policy domain, the next step involves exploratory research and data gathering. **Mapping the situation** is a good way to begin. Mapping will help to determine/identify:

1. What information (qualitative and quantitative data) already exists about how the policy issue(s) affect men and women differently?
2. What information (qualitative and quantitative data) is lacking/ missing?
3. What other relevant policy interventions related to this policy exist - internally (e.g. specific to NATO) and externally (e.g. EU, OSCE, academic research)? And how are the gender-relevant concerns raised/ addressed in these policies?

Mapping – which would be done in-house, essentially builds an inventory of information – partially illustrated, as follows, using the aforementioned example on Military PPE:

| Gender Mapping Exercise | |
|--|--|
| Policy issues & goals ➡ <i>What are the core policy issues and goals that have been identified?</i> | <ul style="list-style-type: none"> - Current PPE needs upgrading. - Demand for advanced military PPE augmented by ongoing volatile situations in contexts NATO operates and heightened risk of chemical and biological weapons being used in these contexts. |
| Gender questions ➡ <i>What are the gender questions to ask that will help identify any gender dimensions of the issues? What do you want to research and find out, in terms of gender equality? [NB: gender questions will be framed in accordance with the anticipated gender dimensions initially identified].</i> | <ul style="list-style-type: none"> - How do the PPE needs of male and female serving personnel differ? - What is the current situation regarding existing PPE (specifically relating to the design, supply/procurement, functionality and protection needs) of male and female serving military (respectively)? - What (if any) are the key gender-based discrepancies and explanations for such discrepancies? |

|  What is known? | |
|--|---|
| Indicators (quantitative and qualitative): <i>Are there any indicators that are regularly monitored that answer the gender questions? What are they? Who keeps track of them?</i> | <p>E.g. 1: rates of PPE related injuries (incurred in training and on ops.) disaggregated by sex. Quantitative data of this sort might establish link between lack of suitably designed PPE to meet female body specifications and related injuries due to ill-fitting equipment.</p> <p>E.g. 2: safety clothing & equip. survey of military service personnel (male & female). Qualitative data of this sort might establish the type of PPE that is most problematic for men, as for women and work related impacts (on men and women).</p> |
| Research reports available: <i>Are there any research reports that answer the gender questions? (Internal or open source)</i> | <p>E.g. 1: Are there medical and scientific research reports on different physiological effects of chemical and radioactive exposure on men and women e.g. affecting male and female reproductive health, such as the differential effects of ionizing radiation.</p> <p>E.g. 2: Research & anthropometric data i.e. collected by US Army, CAF and NATO's other member nations.</p> |
| Relevant NATO policies or initiatives: <i>Do other NATO policies or initiatives relevant to this issue/policy domain, exist? Do they also take the gender dimension into account?</i> | <p>E.g. Possibly linked to budgeting and purchasing policies on PPE (and whether gender-sensitive or not); and/or investment and research policies into gender-responsive ergonomic design of PPE.</p> |
| Policy/practice initiatives of others (in the Defense and Security Sector, across the academic community, and/or CSOs): <i>What's known of how others are responding? Do they include the gender dimension?</i> | <p>E.g. what are the policies/strategies of OSCE, UN, AU, Defense Ministries of NATO members.</p> |
| International/ national legislation: <i>Is there any international or national legislation relevant to the policy domain? Are there gender dimensions explicitly addressed in this legislation?</i> | <p>E.g. National and International Regulations on Personal Protective Equipment that includes a gender perspective.</p> |
| SUMMARY: <i>Summary of key findings from the mapping exercise – gaps/ actions/ next steps:</i> | <p><i>(hypothetically):</i> The mapping exercise may indicate a good degree of available research on gender-based discrepancies in military PPE (design/manufacture), yet a paucity of research on the impact of gender-based discrepancies on male and female military personnel (e.g. on health and welfare, deployment, operational performance). Recommended next steps may be</p> |

| | |
|--|---|
| | to (i) draw on existing research findings (as basic for evidence-based data on gender dimensions); (ii) identify where further data is needed and generate additional data that captures gender issues (e.g. in this case, on impacts). |
|--|---|

Mapping is **not an analytical process**, rather, a means of collecting available information and identifying data gaps. Mapping helps to lay the foundation and frames/ sets the direction for subsequent research that fill the gaps.

See [Annex 3](#) for Mapping Tool Template.

4.3 Framing gender questions

Even at the mapping stage, it is important to develop well-formulated gender questions. For gender research to be effective, and herald credible findings and recommendations that shape and direct policy formation, **gender research must be focused**. Focus starts with well-formulated gender questions aligned to established gender theories that seek to clarify and understand the gender dimensions of the given policy issue/ topic in question.

There is no ‘generic’ set of gender-research questions per se. Gender questions must be framed and tailored to the policy issue/ topic in question. However, some overarching questions that gender analysis seeks to answer at the design stage e.g. when developing policy, will include:

- What is the current situation of men and women in relation to the policy issues/policy goal?
- Will the proposed policy contribute to existing inequalities in the situation of men and women? Which women? Which men? (noting that women and men are not homogenous).
- Does the proposed policy break down or challenge existing inequalities in the situation of women and men?
- Will the proposed policy change the perceptions and stereotypes about men and women, and their roles, in any way?
- What options should be considered to strengthen a gender perspective?

4.4 Methodologies for Gender Analysis

Research may be approached in any number of ways and the chosen gender analysis research methodology will very much depend on what **level and degree of analysis** is required, in the given situation, as well as what human and financial resources are available, and what time considerations there are.

Gender analysis can be a quick and cheap exercise or it can require a lot of time and resources. Given probable time and resource constraints, it is never-the-less important to

‘work with what one has’ and it is still possible to gather valuable data over shorter timeframes to inform policy decisions.

Among the core research methodologies, and the objects they fulfill, include:

| What? | Who? | How? | Why? |
|---------------------------------------|--|---|--|
| A. Desk-based research | Nominated policy planner(s) from Divisions and/or WPS office staff (actioned to do gender analysis) + baseline knowledge | Application of identified ‘gender questions’ to existing data/knowledge | Desk-based research is an appropriate methodology to use when information is readily available and those actioned to do gender analysis have good understanding of how basic gender theories relate to the policy issue/topic in question. |
| B. Desk-study + Focus Groups | Policy stakeholders including those with gender expertise | Coming up with ‘gender questions’ as a group and providing answers to them, based on existing knowledge of the group and insights from desk research. | Combined desk-based research with focus groups it is still cost-effective and can provide greater depth of analysis and results than a desk study alone. Including gender expertise in the group of policy stakeholders will help identify and apply the necessary gender theory and analysis to the policy issues/topic in question. |
| C. In-depth research or survey | Qualified researcher with gender (and other relevant) expertise | (1) In-depth analysis of existing statistical and other data; and/or (2) Collection of new data (that responds to gender data gaps) and provides detailed analysis of technical ‘gender questions’. | Commissioning in-depth research obviously requires time and resources. It should be applied when a sophisticated level of analysis and expertise is needed. The outcome/ result is detailed analysis that can fill the gender data gaps and provide depth of knowledge, understanding and insight into the situation, from a gender perspective. |

4.5 Outputs: what gender analysis can and should provide?

Gender analysis can provide a spectrum of outputs, ranging from a description of the current situation, through to analysis of current situation, suggestions of options and evaluation of options.

Returning to the ‘What-Why’ and ‘So-What?’ principles of gender analysis (discussed, Section 3.2.4), **good gender analysis** goes beyond simply describing a given situation - it suggests **why** the situation is as it is and **makes recommendations for change**.

Integrating gender perspectives into policy should have implications on the design of policy and change policy prescriptions. However, in this respect, it is important to note that efforts to ensure policy is gender sensitive may face resistance and push back to change.

Undoubtedly, the NATO Alliance has made some progress in recent years on integrating gender perspectives into core policy documents, including on topics such as counterterrorism and the use of small arms and light weapons. At the same time, progressing the gender agenda at NATO and driving meaningful, sustained institutional change, can be slow and difficult. **Gender-sensitive policy recommendations may well conflict with dominant values around which the institution of NATO is organized.**

For those advocating for gender-sensitive policy at NATO-HQ (i.e. WPS Office team and Divisional WPS-task force representatives), recommendations include:

- **Approach Allies who are known advocates** of the WPS agenda, requesting support to demand gender analysis (especially in 'gender critical' policy domains), and to endorse the uptake of gender-sensitive policy recommendations.
- **Build a network of gender stakeholders at NATO-HQ**, including gender experts with skills and experience in technical domains, so as strengthen/amplify gender perspective;
- **Get ahead of the game** e.g. produce compelling gender briefs highlighting the gender-dimensions of topics known to be policy priorities for NATO-HQ (now and in the immediate future) – e.g. on current and emerging issues such as Artificial Intelligence (AI), big data, hybrid threats and cyber defense.

4.6 Summary of key points

- In a policy making context, gender analysis starts by asking fundamental questions about how the policy issue/topic will affect men and women.
- **Anticipating the possible differential effects of policy on women and men - because of their respective roles, needs, priorities, and status - is crucial.**
- Formulating good gender questions based on gender theory (e.g. that helps reveal hidden or overlooked aspects of gender inequalities) will point the analysis in the most productive and effective direction.
- Choosing an appropriate gender analysis research methodology will depend on what **level and degree of analysis** is deemed appropriate.
- Probable time and resource constraints **should not prohibit** the undertaking of gender analysis - it is still possible to gather valuable data over shorter timeframes to inform policy decisions.
- **Integrating gender perspectives into policy** will have implications on the design of policy and change policy prescriptions. Be prepared for resistance.
- Efforts to ensure policy is gender sensitive may face resistance, push back and/or substantial inertia to bringing about change.

Section 5: Summary and Conclusions

*“Given that the security sector has the task of protecting **all groups within the population**, it is imperative that security policy-making includes gender perspectives. This will help to develop strategies for security sector actors that identify a broad range of needs – not just those of the most visible and privileged communities or demographic groups in society.”*
(DCAF, Tool 8, p4)

5.1 Overarching take away points from this Guide

1. Gender analysis directs those involved in policy making to **consider the relevant gender issues** in the context of the policy/programme in question and **ensure women and men are not disadvantaged** by a given policy (at a minimum).
2. Gender analysis **challenges the assumption that everyone is effected by policies (programmes/ actions) in the same way**, regardless of gender.
3. **The centrality of gender in policy will vary and must be proportionate.** Gender considerations will be central to some policy and play a major role determining in its evolution – NATO Policy on Preventing and Responding to Sexual Exploitation and Abuse, for example. In other instances, gender considerations may be less significant (e.g. NATO Headquarters Adaptations and Improvements Policy Action Plan), and constitute rather a set of factors to be weighed with others.
4. **Although the gender implications of Security & Defense policy at NATO-HQ may not be immediately obvious**, if the policy issues/goals are assessed to affect men and women, it is essential that the differential gender affects are analysed, understood and acted on.

5.2 Essentials & good practice checklist/ summary

- **Those involved in policy development and analysis (as the policy making stakeholders) should have a basic understanding of gender theory.** In order to ensure a gender perspective, ‘gender stakeholders’ need to be identified and included throughout the policy development cycle.
- **Take measures to ensure gender balance in the core policy making group** (for accountability and credibility), ensuring inclusion of under-represented groups, be they men or women.
- **Take measures to consult with women and men who are affected by the given policy issues/topic.**
- **Gender analysis should** include the examination of other intersecting identify factors such as age, race, class, ethnicity, sexuality.
- **Integrate gender-based analysis** throughout the entire **policy-making process.**

Section 6: Appendices

Appendix 1: Introduction to basic Gender Theories¹⁰

While there are many different theories that help explain existing and potential inequalities between men and women, some basic theories that inform gender analysis include the following:

- Our societies are shaped by a **gender-based power structure**, which divides the population into men and women, and values their contributions unequally. This power structure is so long-standing and pervasive that many of us have come to see it as “normal” and “natural” – although it is not.
- The **gender-based power structure is systemic** – which means that this power structure shapes the institutions and systems in which we participate, even if as individuals we support gender equality.
- Because gender is largely a **cultural and social construct**, gender roles and relations can and do change over time.
- The **gendered division of labour** (i.e., the fact that most paid and unpaid work is generally divided between “men’s work” and “women’s work”) is the starting point for many gender imbalances and inequalities in society. Because men and women frequently occupy/work in different spaces, their needs, priorities, experiences, and perspectives are influenced by the lived realities that more often than not limit women’s choices and opportunities.
- **Access to resources** is distinct from **control over resources**, and control over resources in virtually all societies is unevenly distributed between men and women.
- **Resources** include not only material resources but also time, knowledge, and information. Because of their multiple roles in the home and community, women are often “time-poor” – but for the same reasons they are rich with knowledge and experience that is not always valued.
- **De jure** (legal) gender equality does not always translate into **de facto** (practical) gender equality.
- **Culture, attitudes, and stereotypes** profoundly influence access to and control over resources, and thus the realization of de facto gender equality.

Gender analysis takes baseline theories such as these as its starting point.

¹⁰ Source: [gender mainstreaming in practice a toolkit 28part i295b15d.pdf](#)

Appendix 2: Applying a gender perspective to data analysis

- **Example 1: Analysis of data on human trafficking¹¹ from a gender perspective:**

| Data that are not disaggregated by sex | (Box 1) Sex disaggregated data |
|--|---|
| <ul style="list-style-type: none"> • In 2016, an estimated 40.3 million people were victims of human trafficking. • Trafficking for the purpose of sexual exploitation was the most predominant form of global trafficking, accounting for 54% of all forms of trafficking. • About 4 in 10 victims detected between 2012 – 2014 were trafficked for forced labour. | <ul style="list-style-type: none"> • In 2016, an estimated 40.3 million people were victims of human trafficking, 21% of whom were men, 49% women, 23% girls and 7% boys. • Trafficking for the purpose of sexual exploitation was the most predominant form of global trafficking, accounting for 54% of all forms of trafficking. Females represent 96% of victims trafficked for sexual exploitation. • About 4 in 10 victims detected between 2012 – 2014 were trafficked for forced labour, and out of these victims, 63% were men, predominantly in construction and fisheries. |
| <p>(Box 2) Analysis</p> <ul style="list-style-type: none"> • Most of the victims detected across the world are females; mainly adult women. • Women and girls together represent 71% of detected trafficking victims. • The vast majority of the detected victims of trafficking for sexual exploitation are females. • At the same time, more than half of the victims of trafficking for forced labour are men. | |
| <p>(Box 3) Gender Perspective</p> <ul style="list-style-type: none"> • Victims of trafficking can be any age and any gender, however, a disproportionate number of women and girls become victims of trafficking in general, and for sexual exploitation in particular. • Root causes and contributing factors for why trafficking disproportionately affects women include gender inequality (gendered poverty, lack of viable employment opportunities, lack of control over financial resources and limited access to education that can exacerbate the vulnerability of women and girls to trafficking). Gender-based violence (and cultural norms that normalize such violence) also contribute to the cycle of violence against women and make them more vulnerable to trafficking. • Women, men, boys and girls are not trafficked in the same way, or for the same purpose and the data suggests caution, so not to perpetuate or reinforce gender biased notions of human trafficking perpetrators and victims. i.e. that men are always the perpetrators and women always the victims. • Root causes and contributing factors of trafficking of men also need to be understood and assessed, to ensure vulnerability, support and protection needs of male victims of trafficking are also addressed. | |

¹¹ Source of data: ICAT The Interagency Coordination Group against Trafficking in Persons Issue Brief #4

- **Example 2: Analysis of data on landmine victims¹² from a gender perspective**

| Data that are not disaggregated by sex | (1) Sex disaggregated data |
|--|---|
| <ul style="list-style-type: none"> • In 2017, 5,614 civilians were killed or injured by antipersonnel and antivehicle landmines, including improvised landmines, as well as unexploded ordnance. | <ul style="list-style-type: none"> • In 2017, 5,617 civilians (740F: 4,874M) were killed or injured by antipersonnel and antivehicle landmines, including improvised landmines, as well as unexploded ordnance. |
| <p>(2) Analysis</p> <ul style="list-style-type: none"> • In 2017, men and boys made up the vast majority of all casualties, with 87% of all casualties for which the sex was known (4,874 of 5,614). • Women and girls made up 13% of all casualties for which the sex was known (740). | |
| <p>(3) Gender Perspective</p> <ul style="list-style-type: none"> • Men and boys more likely to be involved in heavy agricultural work, such as ploughing and scrap-metal collection, where mine/ERW encounters are more likely; • Men and boys enjoy greater mobility and are therefore more exposed to the risk of suffering ERW/landmine accidents; • Men & boys follow safety instructions less strictly; • Boys tend to pick up/tamper with ordnance more; • Former combatants (predominantly male) overconfident in dealing with mines. | |

NB: Analysis (from a gender perspective) as to why so many of the victims of landmines are men and boys demonstrates the powerful influence of gender norms, which influence (in this case): divisions of labour, gendered (constraints on) mobility and risk taking behavior.

- **Example 3: Analysis of data on Conflict Related Sexual Violence (CRSV)¹³ from a gender perspective:**

| Data that are not disaggregated by sex | (1) Sex disaggregated data |
|---|---|
| <ul style="list-style-type: none"> • From January to September 2014, the UN confirmed 698 cases of conflict related sexual violence | <ul style="list-style-type: none"> • From January to September 2014, the UN confirmed 698 cases of conflict related sexual violence affecting 361 women, 332 girls, 3 men and 2 boys |
| <p>(2) Analysis</p> <ul style="list-style-type: none"> • Figures included in the report suggest that women and girls are the greater targets of CRSV (99.3% compared to 0.7%). | |
| <p>(3) Gender Perspective</p> <ul style="list-style-type: none"> • In countless conflicts, rival parties weaponise women’s bodies as part of their strategy; • Conflicts and situations of instability exacerbate pre-existing patterns of discrimination against women and girls, exposing them to heightened risks of CRSV. • Stigma and shame of CRSV likely to account for underreporting of cases in this reporting period, by women, men, boys and girls. | |

¹² Source: <http://the-monitor.org/en-gb/reports/2018/landmine-monitor-2018/casualties.aspx>

¹³ Data source: Report by the Sec. Gen to the Security Council (9S/2015/203) issued on 23 March 2015

- Due to pronounced stigma surrounding male-on-male sexual violence and the side-lining of responses to CRSV affecting men and boys, underreporting of CRSV by men and boys potentially significant.

NB: It's really important to interrogate data and ensure analysis from a gender perspective is not itself 'gender-blind' or risks perpetuating gender-biased stereotypes and assumptions (e.g. 'women as victims, men as perpetrators' paradigm). In this example, analysis from a gender perspective helps us to interrogate the data presented on men and boys as well as on women and girls.

- **Example 4: Analysis of data on Disarmament, Demobilisation and Rehabilitation (DDR) from Sierra Leone¹⁴ from a gender perspective:**

| Data that are not disaggregated by sex | (1) Sex disaggregated data |
|---|---|
| <ul style="list-style-type: none"> • Between 1998 – 2002 in Sierra Leone, 72,500 combatants were disarmed and demobilised, including 6,845 child soldiers. | <ul style="list-style-type: none"> • Between 1998 – 2002 in Sierra Leone, 72,500 combatants were disarmed and demobilised, including 4,751 women (6.5 per cent) and 6,787 children (9.4 per cent), of whom 506 were girls. |
| <p>(2) Analysis</p> <ul style="list-style-type: none"> • 84% of combatants who were disarmed and demobilised in the 4-year period were men. • Women and children constitute 15.9% of those registering in DDR. | |
| <p>(3) Gender Perspective</p> <ul style="list-style-type: none"> • Female ex-combatants and women associated with armed forces and groups face complex barriers to formal registration and equal access to DDR programme benefits and services. • Reasons for low registration levels are often gender-related. Existing gender-norms may prevent women from making themselves known as a member of an armed force or group out of fear for social stigma. • The DDR programme itself might also exclude women through gender-insensitive public information campaigns or by setting narrow eligibility criteria. • The result – female ex-combatants and women associated with armed forces and groups do not receive financial support, skills development assistance or benefit from employment creation, leaving them more vulnerable to abuse and exploitation, such as human trafficking or prostitution. Exclusion of women from DDR programmes thus perpetuates cycles of sexual violence. | |

NB: Low formal registration of women and girls is characteristic for many DDR programmes. There is an inconsistency between numbers of women who participated in armed conflict and those who effectively register in DDR programmes.

¹⁴ Data source: http://www.operationspaix.net/DATA/DOCUMENT/4024~v~Disarmament_Demobilisation_and_Reintegration_in_Sierra_Leone.pdf

Annex 3: Mapping Tool Template

| | |
|--|--|
| Title: | |
| Policy issues & goals → | <i>What are the core policy issues and goals that have been identified?</i> |
| Gender questions → | <i>What are the gender questions to ask that will help identify any gender dimensions of the issues? What do you want to research and find out, in terms of gender equality?</i> <i>[NB: these will be framed in accordance with the anticipated gender dimensions initially identified].</i> |
| What is known? ↓ | |
| Indicators (quantitative and qualitative): | <i>Are there any indicators that are regularly monitored that answer the gender questions? What are they? Who keeps track of them?</i> |
| Research reports available: | <i>Are there any research reports that answer the gender questions? (Internal or open source)</i> |
| Relevant NATO policies or initiatives: | <i>Do other NATO policies or initiatives relevant to this issue/policy domain, exist? Do they also take the gender dimension into account?</i> |
| Policy/practice initiatives of others (in the Defense and Security Sector, across the academic community, and/or CSOs): | <i>What's known of how others are responding? Do they include the gender dimension?</i> |
| International/ national legislation: | <i>Is there any international or national legislation relevant to the policy domain? Are there gender dimensions explicitly addressed in this legislation?</i> |
| SUMMARY | <i>Summary of key findings from the mapping exercise – gaps/ actions/ next steps:</i> |