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To cite this article: Jemimah Njuki, Martha Melesse, Chaitali Sinha, Ruhiya Seward, Marie Renaud, Shannon Sutton, Tavinder Nijhawan, Katie Clancy, Ramata Thioune & Dominique Charron (2023) Meeting the challenge of gender inequality through gender transformative research: lessons from research in Africa, Asia, and Latin America, *Canadian Journal of Development Studies / Revue canadienne d'études du développement*, 44:2, 206-228, DOI: [10.1080/02255189.2022.2099356](https://doi.org/10.1080/02255189.2022.2099356)

To link to this article: <https://doi.org/10.1080/02255189.2022.2099356>



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Published online: 11 Aug 2022.



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Meeting the challenge of gender inequality through gender transformative research: lessons from research in Africa, Asia, and Latin America

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ABSTRACT

While the global development agenda has prioritized gender equality, many challenges remain, and the COVID-19 crisis has exacerbated inequalities. Gender transformative approaches to social change have the potential to address the underlying causes of inequality. This paper draws insights from studies funded by Canada's International Development Research Centre to understand how integrating gender transformative approaches to research can support social change. The findings suggest that gender transformative research is most successful in supporting change when it analyzes and addresses the multiple causes of inequality, takes an intersectional and structural approach, embeds the research in local contexts, and engages power holders and perpetrators of inequality.

RÉSUMÉ

Si les objectifs de développement mondial ont donné la priorité à l'égalité des genres, il y a encore de nombreux défis à relever dans ce domaine et la crise de la COVID-19 a exacerbé les inégalités. Les approches transformatrices du genre nous permettent de faire face aux causes sous-jacentes de ces inégalités. Cet article base son analyse sur des études financées par le Centre de recherches pour le développement international, au Canada, et vise à mieux comprendre comment l'adoption d'approches transformatrices du genre dans le contexte de la recherche peut appuyer le changement social. Nos résultats suggèrent que la recherche se basant sur une approche transformatrice du genre a de meilleures chances d'inciter des changements sociaux lorsqu'elle analyse et répond aux différentes causes des inégalités, lorsqu'elle adopte une approche intersectionnelle et structurelle, lorsqu'elle intègre la recherche dans des contextes locaux et lorsqu'elle confronte les détenteurs du pouvoir et les responsables des inégalités.

ARTICLE HISTORY

Received 10 June 2021
Accepted 13 June 2022

KEYWORDS

Gender equality;
transformative change;
research; women; girls

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This article has been republished with minor changes. These changes do not impact the academic content of the article.

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Introduction

Gender equality has been on the development agenda for decades but remains a persistent and challenging goal that requires contextualized and innovative approaches. There has been a renewed focus in the international research and development community to address gender inequality. While laudable, these advances have not yet resulted in sufficient progress towards equal representation and outcomes for women globally. Key gaps remain for example in control of financial assets and in time spent on unpaid tasks. Women have as much access to financial services as men in just 60 per cent of the countries and to land ownership in just 42 per cent of the countries assessed and spend, on average, twice as much time on housework and other unpaid activities as men (World Economic Forum 2018).

There is growing recognition that merely providing access to practical solutions such as services, training or other economic opportunities or mobile connectivity, is not translating into transformative change for women because these measures do not necessarily address the underlying norms and structures that perpetuate gender-based inequalities and vulnerabilities. Mainstream approaches to women's economic empowerment have been critiqued as technical fixes that fail to acknowledge that social, political and market systems are structured in a way that reflect and reinforce the societal inequalities that shaped them (Cornwall 2016; Kabeer 2005; Razavi and Miller 1995).

In the early 1980s, there were numerous calls for a more systematic and structural approach to addressing gender inequality (Benería and Sen 1981; Hembrough and Rossi 1974; Lorber 2005; Risman 2004). Many authors such as Cavalcanti and Tavares (2015) and Kabeer and Natali (2013) have argued that without directly confronting and acknowledging the issues of power and social justice, gender injustice will continue to exacerbate poverty and hinder much needed social development.

Tackling the structural causes of inequality in a systematic way requires approaches that go beyond instrumentalist interventions that consider gender equality as a means to achieve other development goals, to those that deal with social structures of power. These approaches have in common the concern with gender as an axis of power, with rebalancing power and dismantling structures of inequality as outcomes (Kantor 2013; Kantor, Morgan, and Choudhury 2015; Njuki, Parkins, and Kaler 2016). They challenge traditional approaches to research to rebalance power, redefine participants as experts, ensure a dedication to ethics, and acknowledge that all research is value-laden and not objective (Maynard 1994).

How issues are framed by researchers matters; “there is a need to embrace the complexity and diversity involved in gender relations, to avoid emerging with overly simplistic conclusions” (Okali and Bellwood-Howard 2017, 2). And this is where gender transformative research approaches speak to what has been known for years—the need for contextual analysis that accounts for the “complex and nuanced” social relations of gender (Okali and Bellwood-Howard 2017; Taukobong et al. 2016; McDougall 2015; Cole et al. 2020).

This paper defines gender transformative research as action research that addresses the root causes of gender inequalities and creates the conditions for lasting social change at the household, community and institutional levels and generates evidence on both the processes and outcomes. The paper emphasizes action research, as research

that creates knowledge based on enquiries conducted within specific contexts and often with the active participation of people or groups of people who are most affected by the problem or issue being researched. The purpose of action research is to learn through action that then leads to individual or community development. Meyer (2000) posits that the strength of action research lies in its focus on generating practical solutions to problems and its ability to empower practitioners, by engaging them in the research and the subsequent implementation activities.

While projects and programs that embody a gender transformative approach have grown over the past two decades, many programs remain small in scale, often implemented by civil society organizations and women's movements, and not in ways that offer generalizable principles that demonstrate under what conditions they work to address structural inequalities (Light 2011).

Developing approaches and principles for gender transformative research requires their application in a research context where researchers are testing them across sectors and communities using multiple tools and methods. Without such diversity, it could be argued that the derived principles should not be applied to other contexts or embedded in other paradigms and methodologies. This article explores six case studies of gender transformative research across Africa, Asia, and Latin America supported by the International Development Research Centre (IDRC)¹ and how the research led to reductions in gender-based violence and early and forced marriage, and addressed deep gender inequalities in fisheries, water and sanitation, mining, and health. The case studies construct generalizable principles for gender transformative research.

Framing the research: gender transformative research approaches in the gender and development context

The study of the causes and possible solutions to gender inequality has expanded over the past 50 years, with new agreements, research, and frameworks to tackle different aspects of the challenge. Since Ester Boserup published *Woman's Role in Economic Development* five decades ago (Elmer and Boserup 1972), gender inequality literature has rapidly increased and influenced public discourse on development. Gender mainstreaming and analysis frameworks began dominating development policy approaches, and feminist scholars continually critiqued these efforts for failing to unpack and address the power structures that underlie deep gender gaps. The Harvard Institute for International Development (HIID) developed the first framework for understanding women's economic development in 1980, highlighting the differences between women and men in use of labor, tasks and time expenditure, and access to and control over assets (Overholt et al. 1991). The Moser Framework (Moser 1989, 1993) focused on women's triple roles in production, reproduction, and community activities; women's practical and strategic gender needs; and women's interests. The Women in Development and the Women and Development frameworks and paradigms focused on individual empowerment and "levels" of equality: welfare (meeting basic needs), access (to resources and benefits), conscientization (awareness), participation (active engagement in development processes) and control (decision-making about resources, benefits, representation, etc.). The Women's Empowerment Framework (Longwe 1994) introduced the concept of social relations as a key component of empowerment. Feminist scholars have argued that by

and large, such approaches lack an understanding of relational dimensions of gender equality (Okali 2012) and entrenched a mismatch between feminist scholarship, policy makers', and practitioners' interests.

More recent frameworks recognize the multiple dimensions of gender equality and women's empowerment and show promise for fostering broader change processes. The Kabeer (1999) framework, incorporating a social relations approach, defines empowerment as the ability to exercise choice with resource allocation (broadly including access and future claims to material and human and social resources); agency (including decision making, and other manifestations of an agency such as negotiation, deception, and manipulation); and achievements (well-being outcomes). This approach adopts the understanding that gender relations are constituted by relations of power.

Though unevenly applied, today these frameworks are considerably more mainstreamed in development discourse and practice and represent an intellectual history informing research on gender equality. A more recently developed framework by Gender at Work (Rao and Kelleher 2016) highlights the interrelationships between the formal and informal realms of gender inequality, the individual and the systemic. It brings together the connections between individual agency, peoples' access to and control over resources, and the institutional structures and social norms that define the "rules of the game."

In this paper, we use this framework to understand how gender transformative research straddles the individual and the systemic/structural, the formal and the informal, and the relationship between the various domains. Methodological approaches used in the case studies are defined by whether they meet certain features such as engaging the users of research, or taking an intersectional analysis, and on the outcomes they produce. This framework allows us to analyze gender transformative research approaches that the six case studies adopted and the resulting changes in gender equality, mapped along the various spheres of change. Experience has shown that changes in only one sphere of equality can often lead to negative changes in other spheres. For example, women's economic empowerment and greater engagement in formal work can lead to a backlash in the form of gender-based violence if norms and social relations do not change in tandem (Martinez 2006) (Figure 1).

Methodology and approach

Given the dearth of data and research in the development sector on what works, how and under what contexts for gender transformative research and social change, IDRC conducted a document survey and assessment of research projects funded over a ten-year period (2008–2018). During this period IDRC funded over 1700 research projects as grants to organizations in the Global South on topics including employment and growth, maternal and child health, agriculture and food security, governance in health systems, climate change, and governance and justice. IDRC's commitment to increase gender programming is reflected in the increase of the proportion of IDRC projects with a varying degree of gender focus from 14 per cent in 2008 to 46 per cent in 2018.

A working group at IDRC conducted a general key term search of all titles and abstracts funded by IDRC during that period. Search words included gender, women's empowerment, gender equality, structural inequality, and social norms. This excluded

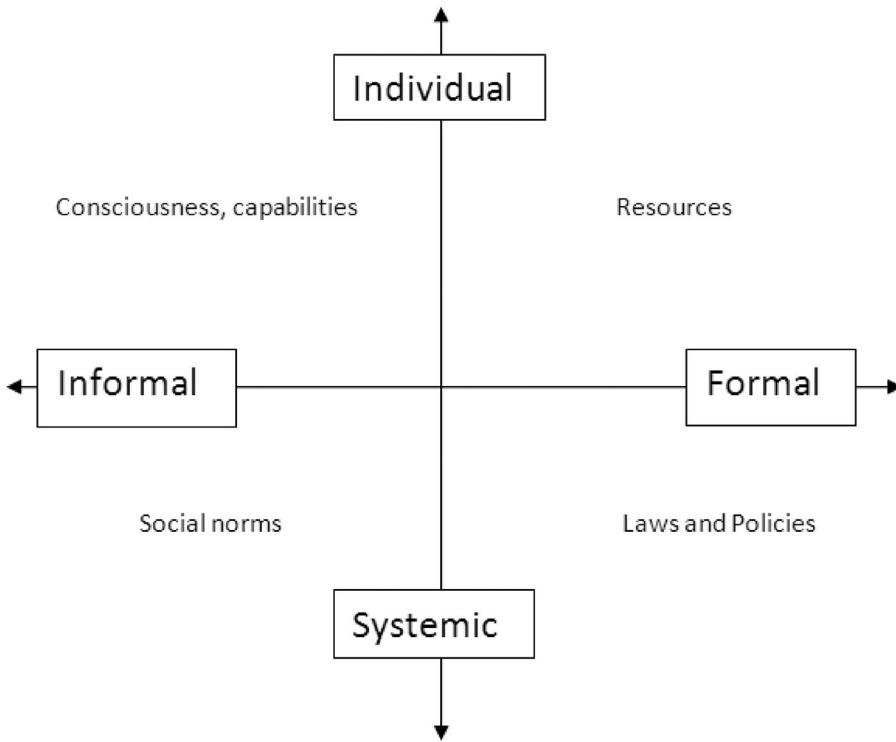


Figure 1. Dimensions of gender equality and women’s empowerment. Source: Rao (2016).

uncompleted projects as they would not have generated outputs that could be assessed for their contribution. A total of 1121 projects met the criteria for the search. A further reading of the projects led to a short list of 219 projects that had explicitly integrated gender in the implementation. From this pool, 42 were randomly selected for deeper review to determine which were gender transformative. The team used a four-level gender marker (shown in Table 1) to assess the extent of gender integration in the research and to identify the gender transformative projects.

Using the gender marker, 16 research projects out of the 42 randomly selected met the gender transformative criteria. Out of the 16 projects, six case studies were selected to cover different sectors and geographies, different types of inequalities and methodological approaches. We analyzed the six studies to derive common principles. We organized the results of case studies to correspond to the four spheres of change or outcomes in the

Table 1. Gender marker for assessing the level of gender integration in 42 randomly selected projects.

Gender aware	Gender sensitive	Gender responsive	Gender transformative
Recognizes gender differences and inequalities but design does not take these into account	Uses gender as an analytical category but gender is not integrated in the approaches and interventions	Uses gender analysis and methodology and the interventions address gender differences and inequalities	Analyzes root causes of gender inequalities including norms and structural barriers and takes action to address these underlying causes of gender inequality in a systematic and holistic way

Source: Authors.

Gender at Work Framework described above. In analyzing the outcomes, we recognize that gender transformative change is unpredictable and nonlinear and involves multiple influences of diverse actors and agencies (Batliwala 2006; Kantor 2013). We, therefore, do not measure attribution but seek to connect some of the approaches and principles of gender transformative research to the social change observed. The key features of the approaches used for each case study and resulting outcomes are described below.

Case 1: Changing gender and social relations in the fisheries sector in Zambia

Context

In the agri-food system, the focus on gender has largely been on bridging the gender gap in access to technologies, knowledge, and productive resources so that women could increase their productivity and contribute effectively to household food security. In Zambia and Malawi, women participate actively in fishing as important sources of livelihood; however, they are often isolated, performing only processing activities using traditional, rudimentary, and labor-intensive technologies, while men do the fishing and selling, earning a greater income. The lack of improved technologies and of access to finance, combined with women's low mobility, causes up to 38 per cent in losses of captured fish. With few options for women in other nodes of the production chain, they earn less income and lack control over income and decision-making power within their households.

The gender transformative research approach

Research examined ways of improving women's livelihoods and empowerment in this sector by exploring the root causes of gender inequality in fisheries. The key question was how does a gender-accommodative approach—one that works around gender differences to achieve objectives—compared to a gender transformative approach in terms of influence on women's empowerment outcomes? The research specifically examined shifts in decision-making powers related to the income generated from economic activities and the ownership of key fishing and processing assets, as well as changes in the underlying gender attitudes. Using a mixed methods approach of surveys, community focus group discussions, and case studies, the research went beyond a narrow focus on technical constraints to uncover underlying gender norm constraints.

The research team used results from community discussions to develop scripts and trained community members to perform them as theatre. The community theatre focused on several topics, including gender roles, decision-making, control of resources, women's time use, mobility, and gender-based violence. Each theatre performance was followed by a facilitated discussion to spark locally led shifts in gender norms and power relations. Participants in this process included women and men fishers, village committees, traditional leaders, transporters, boat builders, representatives from village savings and loans, the Department of Fisheries, and the Ministry of Trade and Industry.

Results

Three key results emerged from this research:

Agency: Among the participants in the community theatre, there was a greater shift in perception that “women should not be involved in fishing”—45 per cent compared to 26 per cent among non-participants. Women involved in the performances increased their participation, by 70 per cent, in the more lucrative fishing activity. Theatre for development also had an impact on women’s agency as 30 per cent more women participants increased their contributions to decision-making regarding fish processing and 49 per cent more took part in deciding what to do with the associated income. Women’s involvement in decisions about income generated from fish trading increased for those who participated in community theatre, from 65 per cent to 94 per cent.

Access to and control over resources: Several men who participated in the theatre, changed their perception of who owns the fishing and processing assets. Men reporting sole ownership went from 50 per cent to 19 per cent in less than a year and a half. Reporting of joint ownership increased from 44 per cent to 76 per cent.

Equitable social norms and inclusion: To measure shifts in structures and attitudes, the project used a gender attitude scale comprising eight statements reflecting current gender norms and practices: for example, “women should not get involved in fishing full-time, that is a man’s responsibility,” and “men should primarily be the ones who control the earnings obtained from the sale of fish.” Overall, the attitudes shifted markedly toward support for gender equality.

Case 2: Raising women’s voices and tackling adverse gender norms in artisanal and small-scale mining

Context

Artisanal and small-scale mining (ASM) supports hundreds of millions of people globally. It grew from an estimated 10 million miners in 1999 to 20 to 30 million a decade later. Africa houses an estimated one-third of the world’s mineral reserves. Millions across the continent earn a living from this form of mining. Although large numbers of women are engaged in this activity, their role is typically one of food production and small-scale trading. If women are recognized as doing mining work, they are often dismissed as not “real miners.” Little is known about the varied roles they play in the mining process, including as miners. Research provided an in-depth study of women’s economic roles and livelihood practices in the mining of gold, tin, tantalum, and tungsten: four minerals in high demand globally and subject to a range of national and international regulations. The study also examined what holds women back. The research was carried out in Rwanda, Uganda, and the Democratic Republic of the Congo.

Gender transformative research approach

Researchers examined the social norms and gender power relations that limit women’s economic opportunities in artisanal and small-scale mining and that segregate their work to less remunerative tasks. This research revealed culturally rooted forms of discrimination in the mines and identified the ways in which gender norms, attitudes,

and institutions shape the kinds of activities that are deemed acceptable for women, as well as their economic impact. The research paid close attention to the relations that affect women's and men's forms of agency and that shape their livelihoods within households, communities and in the mines. For example, the teams examined relations between women and government officials, traditional authorities, brokers, soldiers or non-state armed forces, license holders, mine bosses, and subcontractors. They also examined gender-based decision-making and power dynamics within the household. This focus was critical. In the absence of a deeper understanding of the various authority relations at play, attempts to promote or empower women in this sector could benefit only a few women, if any. Interviews centered on how gender-based meaning systems, the discourses, terms, and metaphors that structure mining activities, and the roles of women and men in those activities, are understood.

Results

Three key results emerged from this research:

Agency: With a feminist commitment to ensuring that women's voices and experiences are amplified, the research team worked with women miners at each mining site to chart out policy recommendations. Women miners articulated their experiences to the very policymakers and civil society organizers who often misunderstand women's economic activities in mining. Ensuring women had a voice helped make their work in this sector visible and raised awareness of how adverse gender norms and ill-informed policies stifle their economic prospects, resulting in negative impacts on families and the economy at large.

Access to and control over resources: This project helped strengthen women's leadership and voice in the mines and mining sector, increased their capacity to access more lucrative work and more capital, and helped support gender-responsible policies and systems. It also built the capacity of local researchers, particularly women analyzing these issues. Women In/And Mining Organization (WIAMO), a Rwandan organization, became registered following its participation in this project. WIAMO members gained a complex set of research skills, including feminist research, mixed methods, and policy analysis, in a field dominated by men.

Equitable policies and governance mechanisms: The research-informed ASM policies and reforms. One of the Rwanda partners became involved in the revision of the government's mining policy, helping to shape a draft policy that had a strong section on gender mainstreaming. The research team also developed a pilot gender-impact assessment tool for mining policy law and development.

Case 3: Intercultural health in Peru: choice and voice for Indigenous populations

Context

About one in every four Peruvians is from an Indigenous community. Although there is considerable variation within the Indigenous community, a common reality for most is social exclusion and inequality. Women's health and nutrition are issues that require

considerable attention, but services remain unavailable and hard to access due to ingrained biases and prejudice within societies and the systems within which they operate. The fact that indigenous women are usually overlooked and suffer multiple marginalization required the researchers to understand their specific issues and priorities calling for an intersectional lens to look at health. The approach taken by stakeholders in Peru to address health and nutrition is the integration of Western and Indigenous practices in a holistic way, known as intercultural health. Intercultural health emphasizes the social determinants of health—the conditions into which an individual is born, lives, and works—and the state's relationships with society to formulate and implement policies and programs. Policies and systems need to acknowledge that health and nutrition are inextricably linked to gender, socioeconomic position, culture, and citizenship. Unaddressed, this can potentially cause harm to individuals, families, and communities.

Gender transformative research approach

The local interdisciplinary research team recognized that sustained positive changes using an intercultural approach must recognize and prioritize concepts, cultures, and practices of the local Indigenous populations. They adopted various approaches to ensure different voices were heard and heeded. A participatory approach was used to engage community leaders, women's groups, and other key community members to generate case studies on three different intercultural health programs—maternal health, training of nurses, and improving food security and sovereignty. These involved Quechua- and Ayamara-speaking communities in Puno and Ayacucho in the high Andes and Awajun and Wampis communities in the Amazon region, representing approximately 12,000 people. The participatory approach engaged local and national bodies responsible for delivering healthcare and policies. Researchers used a mix of quantitative and qualitative methods. A combination of timely forums brought together local practitioners, community members, and decision-makers, leading to changes in perceptions and policies, and stronger recognition for intercultural training.

Results

Two key results emerged from this research:

Agency: Attitudes towards mothers providing nutritious meals to their families shifted from blame to increased agency. Previous programs to address malnutrition often blamed mothers and publicly shamed their “lack of achievement” as mothers. This led to widespread mistrust and fear of health and other community support workers. Through the program, women received contextualized guidance on preparing healthy meals using locally available traditional foods. Similarly, a program to train nurse technicians on intercultural health in the Amazon region, implemented by an Indigenous civil society organization led to direct changes in how pregnant women seeking care were heard and cared for. Specifically, these indigenous women could speak their language and respected in their decisions for care. These often included using knowledge from traditional and trusted practices such as vertical birthing and the use of plant-based medicine.

Equitable policies and governance mechanisms: The project captured specific changes to policies and practice in the three programs. In the Amazonas region, a policy issued in

June 2016 added intercultural training and knowledge of the Indigenous language to the evaluation criteria in the recruitment of healthcare personnel. Also, the Amazonas Regional Education Office agreed to recognize intercultural healthcare as a specialty when issuing certificates. An intercultural guide for food education, approved by the Peruvian Association of Nutritionists, was developed and is now in use to strengthen improved food security and enhanced nutrition. The guide was recognized by officials of the Ministry of Health and the Ministry of Social Development as a valuable educational tool in the fight against anemia and malnutrition in rural areas.

Case 4: Women's rights and access to water and sanitation: improving dialogue between local women and local governments in India

Context

In India, rapid urbanization has compromised existing environmental infrastructures. Additionally, complex land tenure and rental arrangements, particularly in slum areas, prevent municipal utilities from providing much-needed services. In Delhi, forced resettlement to the periphery of the city has led to the creation of new, overcrowded, and polluted areas that lack basic amenities such as access to clean water, and health facilities. The lack of safe, affordable, and accessible sanitary facilities is the daily reality of poor women in these areas, denying them the right to basic services and a life of dignity, safety, and security. The development of sanitary technology and facilities that are responsive to the needs of women and girls remains a challenge. While there have been many initiatives to create gender-appropriate modifications to existing technology, the larger question is one of accountability, transparency, and equitable governance in the provision of water and sanitation services. Promoting gender analysis in local governance can help address the sanitation gap for poor urban women.

Gender transformative research approach

Jagori, a feminist women's movement organization in India, led action research in Bawana and Bhalswa, two communities in the northwest district of Delhi, to engage poor women in improving local services and accountability. The research combined experimental methods to test three accountability mechanisms (before and after, with and without interventions): the right to information, a gender or women's safety audit, and gender budgeting. The goal was to understand how root causes and gender norms constrain access to water and sanitation. While the research methods, the insights around accountability mechanisms, and the detailed study of the opportunity cost of water could be replicated elsewhere, the process of engagement in this project was strongly embedded with local actors.

Results

Two key results emerged from this research:

Agency: The participatory process bringing together women, community leaders, and government officers to dialogue helped to build the capacity of community members,

including women, to dialogue and negotiate with local governments to use evidence for change. The analysis highlighted that even though water and sanitation was a priority, the Delhi budget allocated only 17 per cent of funding to this item. Beyond issues of sexual harassment, the research also revealed a significant opportunity cost related to this poor service—the wages women were unable to earn because of time spent collecting water or accessing sanitation. Quantifying the opportunity cost raised awareness about the constraints by valuing this time against the minimum wage standards of unskilled labor, showing the wage losses in a year. The research highlighted how settlement residents were subsidizing Delhi's lack of investment in proper services.

Equitable policies and governance mechanisms: The research led to some real changes in policies and practice. There was a reported reduction in harassment of women on the way to community toilets as well as practical improvements in potable water delivery, latrines, and solid waste collection. In Bawana, over 300 people in the community signed a petition directed to their Member of the Legislative Assembly regarding the maintenance of community toilets. The study also helped to influence a national policy on women's safety and gender-sensitive essential services. The research team developed practical guidelines for other low-income communities to carry out their own women's safety audits. The research helped to improve water and sanitation infrastructure through a process of dialogue between women, their communities, and the local governments. The analysis of the interlinked root causes of poor access to water and sanitation showed that these issues are inseparable from land and security of housing tenure, informal settlement rights, and gender-based violence.

Case 5: Countering gender-based violence in Egypt with data crowdsourcing

Context

Pervasive sexual violence, existing cultural norms, and a general tolerance for harassment in Egypt led a network of activist volunteers and researchers to start mapping incidents of sexual harassment in Cairo starting in 2010 by crowdsourcing incident report data from those impacted by violence. Harassmap emerged from this network, becoming an organization that harnessed digitally crowdsourced information to help change the social acceptability of sexual harassment in Egypt. It allowed people to make anonymous reports via SMS and the website about incidents of harassment and violence, where they occurred, and when possible, information about the perpetrator. Harassmap used this information to visualize the number of incidents and map out areas of Cairo experiencing the most pervasive harassment. This information was used to target community-based outreach and education, to discuss attitudes toward sexual violence and better understand pathways to change norms and behaviors (Figure 2).

Gender transformative research approach

Harassmap's research helped challenge stereotypes that relate to sexual harassment and led to a better understanding of the prevalence of sexual harassment in and around Cairo. Crowdsourced data, combined with qualitative and quantitative data collection, was used

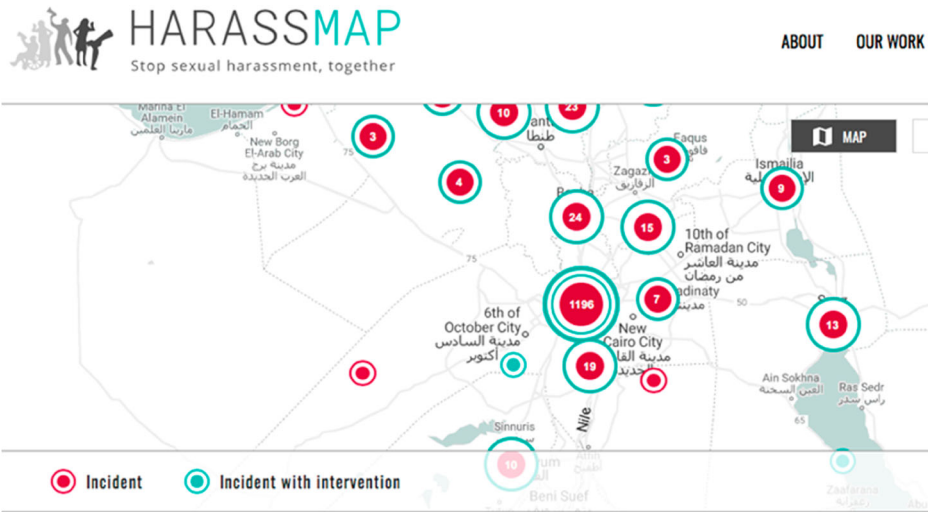


Figure 2. Distribution of incidents mapped on Harassmap in Egypt.

to support social and legal changes to counter sexual harassment, and showed how digital tools can be leveraged in shifting gender norms. The research uncovered many assumptions about sexual harassment: that it happened mostly to young women, that perpetrators were largely unmarried young men, that it was most prevalent at night, that it depended on the victim's dress, and that it was caused by the socio-political conditions in the country. Evidence to the contrary overturned the misconceptions, showing instead that harassment was much more pervasive than anyone knew, occurring most often in the afternoons on the street or on public transportation, that it existed across religious, socioeconomic, and age differences, and that women were harassed regardless of their age. In doing so, it helped unpack the gendered assumptions about harassment and gender-based violence.

Results

Three key results emerged from this research:

Agency: Harassmap's model was important for agency and engagement as both men and women were able to report cases anonymously, engage in volunteerism, and ensure some form of follow-up occurred with every report. The anonymity offered by the platform led to high reporting levels and incorporated a wider range of gender-based violence incidents. A youth agency contracted as a local partner helped contribute to a high rate of volunteerism and activism, spurring in-community interventions because of the data shared. Community members mobilized and ensured the effectiveness of the safe spaces created. Those who were responsible for safe spaces helped identify witnesses to the harassment who could accompany women to file information reports at police stations. There were also many accounts of men initiating safe zones within their businesses and helping to bring perpetrators to justice. A highly regarded TV show that featured Harassmap, as well as a popular YouTube video helped the research reach over 30 million viewers. Following the reports, a local movement against gender-based

violence emerged, with at least 20 anti-sexual harassment groups and agencies and the appearance of the community-led “safe zones.” Harassmap has since been replicated in 28 countries, and for a while was a leader in supporting similar initiatives in other locations globally such as Women Under Siege in Syria, and Akshara/HarassMap in India.

Access to and control over resources: Participation in the promotion of safe places, in the “red spots” of the map, led to the government deploying police vans to the areas. These safe spaces created zones of safety for women and helped socialize the challenges that many people, particularly women of all ages, faced daily in Cairo. This created new spaces and opportunities for women; one interviewee even suggested that the incident reporting led to a quiet sexual revolution in Egypt.

Equitable policies and governance mechanisms: The results of the Harassmap data gathering and the research reached millions of people in Egypt, generated awareness, and a concern for justice. This increasing awareness helped encourage Cairo University to implement its own sexual harassment policy in 2014.

Case 6: Empowering girls to negotiate around early marriage in West Africa

Context

West Africa has some of the highest rates of early child and forced marriage in the world. Of the 10 countries with the highest rates of this phenomenon, six are in West Africa. Marriage before 18 is decried internationally as a violation of the victim’s human rights. The practice entrenches gender inequality and constitutes a major form of discrimination against girls and women. It results in a chain of negative consequences for girls who are the main victims of this structural form of violence, affecting their health, economic opportunities, social supports, and well-being. Governments in the region have adopted legislation and many global standards to prevent early child and forced marriage. Several have also established a legal minimum age at marriage for women and men and have sought to protect the rights of the child through legislative instruments. However, in most of the countries of this region, the legal age is below 18.

Gender transformative research approach

Research led by Women in Law and Development in Africa (WILDAF) explored new strategies and approaches to challenge early child and forced marriage in Mali, Togo, and Niger. WILDAF led a multidisciplinary team with specialists in development, health, anthropology, social sciences, demography, education, and legal sciences. The project design incorporated qualitative and quantitative gender analysis of incidence and research to determine factors and responses to early child and forced marriage. The research teams explored the role of social, traditional, and religious authorities and the conditions required to make them allies and actors in the fight against early marriage. The teams also examined how and to what extent girls’ empowerment can contribute to reducing child marriage. Gender analysis was at the core of the research protocols, with different questionnaires for men and women, boys and girls, and institutional

actors. Importantly, key stakeholders and gatekeepers, such as elders, teachers, and religious and traditional leaders, were involved in the project as well as pathbreakers such as widows, divorced women, and girls who left their marriage.

Results

Two key results emerged from this research:

Agency: The research used a participatory action approach to empower girls and boys through youth groups. They were trained in communication, awareness raising around their rights, and negotiation with elders in their communities. Through the skills, information, and knowledge provided to girls and boys, the girls improved their agency. They became excited about the possibilities of remaining at school, training, and finding work before getting married. They made the case for later marriages in their families and in meetings with elders and religious leaders. Aside from planting important seeds of awareness and empowerment in these communities through the youth groups and elders, the project was able to raise awareness in the West Africa region through the provision of new evidence.

Equitable norms and inclusion: This project revealed the overlapping and reinforcing nature of various gender norms and the informal and formal systems that perpetuate early and forced marriages. The research showed that decisions around marriage, which are justified by religious reasons and rooted cultural beliefs and practices, are mainly made by the men in the family or their representatives, such as the fathers and/or brothers. The research revealed the economic importance of marriage in the context of multiple layers of vulnerabilities in West Africa. The research also showed the negative impacts on education as well as health, such as childbearing at too young an age and its impacts on both maternal and child health. Finally, the research showed the lack of legal protection or support for girls involved in early or forced marriages.

Results and discussion

By applying the Gender at Work framework, the six case studies examined gender inequality at the individual and systemic levels, as well as in formal and informal settings. Findings were synthesized to derive some generalizable principles and lessons, and the conditions that enabled change as outlined below.

Intersectional analysis: recognize multiple vulnerabilities and identities

The case study from Peru demonstrates how intersectionality can be put into practice both in understanding vulnerabilities and in addressing them.

Recognizing the multiple vulnerabilities and identities that intersect with gender is critical to identifying root causes of inequality and achieving gender transformative change, which in turn supports a fuller analysis of the structural challenges. An intersectional analysis examines how gender intersects with other aspects of social identity, such as race, ethnicity, age, sexual orientation, religion, or caste, and to analyze these as interwoven identities that can co-exist and define experiences. In Peru, indigenous women are more socially excluded and suffer more inequalities.

It is widely agreed that intersections create both oppression and opportunity (Zinn and Dill 1996). For example, an intersectional position may be disadvantaged relative to one group but advantaged relative to another. These social identities such as gender and race can serve as organizing features of social relations, and mutually constitute, reinforce, and naturalize one another (Shields 2008). And while identities, such as gender or social class, may be experienced as a feature of individual selves, it also reflects the operation of power relations among groups.

Indeed, within interwoven identities lie power differentials and how they manifest to shape access to resources, opportunities, and outcomes for different groups. McCall (2005) and others have suggested that this is the most important contribution of feminist theory to our present understanding of gender. Feminist researchers argue that an individual's social location as reflected in intersecting identities must be at the forefront in any investigation of gender, and gender must be understood in the context of power relations embedded in social identities (Collins 1999).

The case study from Peru shows the multiple identities that reside within an individual and a collective. Someone can be female and of Indigenous origin, as is the case with some of the women involved in the intercultural reproductive health and nutrition programs in Peru. These co-existing identities can lead to conflicting priorities and aspirations at the personal level, as well as complexities in how different needs for information, privacy, and various services are interpreted by providers.

Unpack structural inequality, and embed analysis and action in local contexts

The case studies show the importance of uncovering structural barriers that contribute to gender inequalities. These barriers include patriarchal socialization, gendered social roles and expectations, institutional and policy inequalities. The study on early marriage in West Africa unpacked interlinked socio-cultural and economic root causes that dictate who makes the decisions, and what influences their decision on whether or when girls and boys get married. The role of traditional leaders and the church as well as societal stereotypes of what happens to girls when they do not marry is unearthed through the research. The study from India addressed root causes and gender norms related to women's ability to access water and sanitation, as well as unfavorable outcomes such as sexual harassment. Other case studies examined the root causes of engrained social norms, discriminatory attitudes, and divisions of labor on poor health and nutrition outcomes as well as limited economic and livelihood opportunities. The research linked these practical issues of access and resources to a more systemic and structural understanding of norms, attitudes, harmful practices, and myths. To do this, all the case studies used formative research, which included gaining deeper understanding of local contexts, barriers, and actors through participatory approaches and stakeholder consultations and to unearth the underlying causes of inequalities and vulnerabilities, whether norms and perceptions, legislation, or institutional barriers.

Transformative processes that aim to address unequal power relations whether between men and women, or between individuals and organizations or between organizations, require shifting power dynamics between actors, and their actions, as well as norms and beliefs (Gaventa 2006; VeneKlasen and Miller 2002), even when the depth of structural dimensions of power are not always evident. Pettit (2012, 4) posits: "if

the ‘power spectrum’ were rotated vertically, taking the shape of an iceberg, actors and processes might be represented by the smaller, visible portion above the water line, while the structures, norms and beliefs would be represented by the vast bulk below the surface, not easily perceived or acted upon.”

In several instances, participatory learning processes to engage local women and their communities in negotiating with local governments (as in the case for intercultural health in Peru, improving access to water and sanitation in India, and using community theatre in Zambia) helped uncover the causes beneath the symptoms and shift power dynamics. Theatre was used in some instances as a means of engaging community members and policymakers (such as the Ministry of Fisheries in Zambia), to discuss sensitive issues and to spark dialogue with different actors and those with varied perspectives. Pettit (2006) argues that it is not possible to support processes of social change without looking at power across the spheres of politics, economics, society, and culture, and considering the actors, institutions, spaces, and levels where it operates. Indeed, participatory processes enable those facilitating social change to engage with individuals that wield the power and those that have been denied this power.

Acknowledging local contexts and framing research within this context is key to understand the socio-cultural gender dynamics at play, to gain insight on who needs to be brought in to effect positive change, and to operationalize the results. Unpacking structural inequalities in the absence of a local lens would be deficient at the very least—and could even lead to misguided structural analysis that could lead to deleterious consequences if used in an applied research context. This includes understanding local processes, norms, and tensions. In the case of Harassmap, for instance, the research helped address the legal and institutional barriers women face in reporting sexual harassment in Egypt. In the case of fisheries in Malawi, the participatory and action research helped unearth tensions and power dynamics between men who were fishers, and women who were fish processors.

The case studies show how the researchers and research processes were able to move beyond addressing practical interests of access and inclusion (e.g. to sanitation, fish processing technologies, health services, or equal pay) to addressing underlying gender norms and power relations that perpetuate vulnerabilities and limit voice and choice. Unless structural inequalities—the social norms that limit mobility, entrench gender-based discrimination, and deepen unpaid work responsibilities—are addressed, the outcomes (eg. early marriage, sexual harassment, poor health and nutrition)—will re-emerge or exacerbate.

Embedding research in context also allows the identification of different types of formal and informal power that define norms, behavior, and expectations. In the case of intercultural health in Peru and improving access to water and sanitation in India, this was formal power by government agencies that was visible. Recognisable structures with these institutions mediate the relationship between people and those who are subject to that authority. In the fisheries study in Zambia, and the early and forced marriage in West Africa, it was informal power in the form of socialized norms, discourses, and cultural practices that are internalized through socialization from a young age, starting with acceptance of inequality in roles and practices. For the early and forced marriage study in West Africa, men and traditional leaders making decisions on marriage of girls played important roles.

Engage stakeholders: localize people-centered research and build trust with stakeholders

Gender transformative research is championed, contested, and eventually operationalized by the communities themselves, as well as by local and national decision makers. It is essential to work alongside individuals and organizations from diverse constituencies from the outset and throughout a project. The case studies used various approaches to build trust and to meaningfully engage stakeholders by creating and nurturing space for local leadership and voice, and by strengthening the capacities of local researchers and organizations. It is the engagement of various stakeholders—including those who have decision-making power to make systemic changes such as the case in the artisanal mining project—and building the capacity and agency of those who are marginalized to engage with these other actors—that helps address and raise awareness about progressive gendered social norms.

The cases demonstrate that the focus should not only be on how issues are problematized, but also how legitimately well positioned and grounded the process is for sustained impact. For example, policymakers and other decision-makers or power holders can be brought in early and often to ensure the research is well-positioned for use. Whose knowledge is captured, and, in turn, who gets to shape the issue, are critical questions. Researchers need to work alongside local actors to strengthen their work rather than (re)define or displace it. Being clear and grounded in the longer-term process of “uptake” and “change” does not preclude influence at earlier stages. Important seeds of dialogue and influence can be planted early that stimulate change long after the funding has ended. Fostering such strategic partnerships to strengthen processes and leverage influence is one of the key learnings from these cases.

Across the case studies, there are several types of engagement that were essential for transformative change to happen. The strategy of engaging men and boys to address gender inequality has been used across sectors (Ruxton and Kaufman 2004), for example in health to address sexual and reproductive health (Barker et al. 2010), in the fight against sexual harassment and gender-based violence (Jewkes, Flood, and Lang 2015), and even in agriculture to address long held views on women’s ownership of assets and decision making. Working with men and boys led to positive change through addressing men’s complicity in gender inequality, challenging the often taken for granted power of men, raising consciousness of the impact of gender inequality and challenging men’s privilege. It can lead to new understandings of masculinity and the role of men in achieving gender equality. Research in the case study on Harassmap in Egypt showed 75 per cent of male respondents reported having perpetrated sexual harassment and interviews and life stories sought to understand the roles of men and women in the community-based outreach activities. Through community outreach, men came out in large numbers to volunteer, demonstrating the power of the evidence and the public discourse to change norms and attitudes. There were many accounts of men initiating safe zones within their businesses and helping to bring perpetrators to justice.

In addressing unequal social norms, the role of traditional and religious leaders who act as custodians of institutional norms and practices and enforce sanctions on those who do not conform is critical to changing the status quo. In the case study on ending early and forced marriage, involving religious leaders and other elders to understand the

impact of the practice on the education, health and wellbeing of girls was critical. In addition, the project also involved what they called “pathbreakers,” or women who had broken away from the practice.

Creating spaces for men, women, and the broader community to engage is critical for gender transformative change. Work with both women and men is especially important, because women can often take for granted men’s power and dominance over them. The study on fisheries in Zambia used role play and community theatre to show different narratives around women’s ownership of resources and women’s decision making, in a sector traditionally controlled by men. Depicting women that owned assets in role plays, and households where men and women made joint decisions on use of income and the outcomes from these alternatives helped to shift thinking on these issues.

Accelerate the change process: scale positive change by leveraging and amplifying local thought leaders and institutions

Scaling gender transformative research can take many different forms. It can be a spillover of positive impacts from addressing norms and models of behavior, or it can replicate or expand a model or way of working. It can also be an influence—such as influencing policies that remove structural barriers, influencing community leaders, or institutionalizing a way of doing things. But to understand the complex processes of social and norm changes, we must understand and define what we mean by a change in norms, and how change happens. For example, can we assume individual-level behavior change cascades into broader community or societal change? And what would be the tipping point for individual change to lead to societal change?

The six case studies show different forms of scaling. The Harassmap case shows how the online platform and community engagement were able to influence norms around harassment and foster a change in university policies; the Harassmap approach was replicated in other places in the country and beyond. Linn (2011) calls this a critical mass model where spontaneous or secondary innovation is catalyzed by actions to change norms or an underlying culture and way of doing things.

The community dialogs in the Zambia Fisheries study reached large groups of people and could be replicated in other communities and adapted to deal with different issues and contexts. This type of scaling depends on the institutionalization of the approach by the organizations involved in this type of work and depends on a combination of methodological pluralism and iterative methodological reflection. The experimental design used in the Zambia study tested the effectiveness of the gender dialogues in changing norms, attitudes and practice and point to the critical role for research in generating evidence for gender transformative approaches.

Local Indigenous leaders in Peru achieved influence by changing birthing practice manuals and training nurses in intercultural health practices, including more traditional vertical birthing positions. This inclusion of traditional methods, often practiced by indigenous women, into nationally used manuals and training programs enabled the knowledge and practices of marginalized indigenous women to be scaled, be accepted nationally, and be applied beyond a small group of people.

Global and local partners can play an important role in scaling by taking lessons and models and applying them elsewhere, as was the case with Harassmap, and with the

mining case study where the North–South partnership was instrumental in integrating lessons at regional and global fora. Individual thought leaders are important in scaling influence.

All the cases achieved some form of influence on gender norms and demonstrated that norms, and discussions that lead to reflection on those norms, are as important as, if not more important than, technical strategies and practices.

Conclusion

This paper draws on and synthesizes research on gender transformative approaches from IDRC-funded research and pulls together key lessons on when research can support social change. The studies reviewed show that despite the long term and complex process, systemic changes in gendered power relations can be influenced by interdisciplinary and contextualized research designs and processes. The paper provides evidence of how those changes happen, what works for different contexts, and how to facilitate change at scale.

In implementing gender transformative research, the research process itself is as important as the research outcomes. By reviewing a set of case studies that led to multiple dimensions of social change, this research identified key principles that are necessary for gender transformative research to lead to changes in gender equality. These include conducting a deep structural and intersectional gender analysis to understand context and the multiple dimensions and layers of inequality and power; meaningfully engaging and building capacities (especially of local actors, men, women, community, local organizations, traditional leaders, and policy makers) to drive and sustain the change process; combining action to influence change with research on how change happens; and a focus how norms and structural change can happen at scale.

Transforming gender relations is not just an issue of inclusion or individual agency but also understanding structural and societal causes of gender inequality. To understand the conditions when *gender transformative research can lead to social change*, research processes must unpack overlapping inequalities and vulnerabilities, understand the underlying causes of inequality, engage those who are affected and those that hold power within communities, policies and institutions, and work with local and global communities to amplify work and ensure change at scale. Though there may be other conditions that also need to be applied to ensure the changes to gender, and social norms are transformative in a sufficient and sustained manner, the authors here believe the principles synthesized from the six case studies represent necessary conditions to support gender transformative changes.

Gender transformative research undoubtedly presents many challenges and limitations. For researchers, it can be a tight balance—developing reflective learning and learning participatory and facilitative skills, while recognizing and acknowledging the power dynamics between those conducting the research and those for whom change needs to happen. Even with more critical and reflective analysis of power in all its dimensions, the gaps between understanding and action from any of the actors in the chain of influence can remain key barriers. Furthermore, the capacity within the research community for structural and intersectional gender analysis, for facilitating change and for operating at multiple scales can also limit the implementation of gender transformative

research. Yet the commitment from research and development organizations to support gender transformative change is critical for moving the needle forward on the contribution of such research in driving change.

Note

1. IDRC is part of Canada's foreign affairs and development efforts. It works with researchers in developing countries and invests in high quality research and innovation, shares knowledge with researchers and policymakers for greater uptake and use, and mobilizes global alliances to drive global change to build a more sustainable and inclusive world. Research priorities include Climate-Resilient Food Systems, Global Health, Education and Science, Democratic and Inclusive Governance, and Sustainable Inclusive Economies.

Acknowledgements

This paper draws on the findings of an external review of IDRC's gender programming carried out by Sisters Ink under the leadership of Nanci Lee.

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