

MAKING SOCIAL PROTECTION GENDER-RESPONSIVE

LESSONS FROM UN WOMEN'S WORK IN THE EASTERN CARIBBEAN

SUMMARY

There is broad-based agreement today that universal social protection systems are a desirable goal. For gender equality advocates, it is paramount to take advantage of this momentum to ensure that such systems benefit women by responding to their rights and needs. Well-designed social protection systems can narrow gender gaps in poverty rates, enhance women's income security and access to personal income, and provide a lifeline for poor women, especially single mothers.¹ The current context of economic stagnation and fiscal adjustment, however, places big constraints on the investments needed to achieve these goals. How can gender equality advocates engage with social protection advocacy in this context? This policy brief showcases the strategies that were used by UN Women's Multi-Country Office in the Caribbean to promote gender-responsive social protection in a context where reforms have been driven mainly by efforts to reduce public debt and promote economic competitiveness.

From global goals to national strategies

The importance of social protection to end poverty (Goal 1), recognize unpaid care work (Goal 5) and achieve decent work (Goal 8) is clearly recognized in the Sustainable Development Goals (SDGs). Governments agreed, in particular, to implement nationally appropriate social protection systems that increase coverage among the poor and the vulnerable by 2030 (Target 1.3). This pledge follows on the heels of the International Labour Organization (ILO) Social Protection Floors Recommendation (No. 202), which defined a set of minimum guarantees that should be available to everyone.² The World Bank—which has traditionally advocated more targeted approaches—also recently joined ILO's call for universal coverage and access to social protection to ensure that no one is left behind.³ These global commitments hold significant promise for women, over-represented as they are among those excluded from existing social protection schemes.⁴ Whether women will actually benefit from growing attention to social protection, however, depends to a large extent on how these global guidelines are translated into national social protection strategies.

The above commitments also come at a time when the public resources available for extending social protection coverage have come under severe strain. While many countries initially responded to the 2008/2009 economic crisis with investments in counter-cyclical social protection measures, fiscal adjustment became the norm from 2010 onwards.⁵ Under these circumstances, social protection often becomes a target for budget cuts or 'efficiency-enhancing' reforms, including the introduction of more rigorous means tests and conditionalities. This is at

odds with a rights-based approach to social protection, which sees universal and unconditional schemes as the best way to prevent exclusion errors and avoid stigma.⁶

How should gender equality advocates position themselves vis-à-vis these developments? How can national-level advocacy contribute to making social protection more gender-responsive in a context of severe fiscal constraints? This brief explores these questions by drawing lessons from the work of UN Women's Multi-Country Office (MCO) in the Caribbean, where economic stagnation, environmental disasters and high debt burdens create formidable obstacles to rights-based, gender-responsive social protection advocacy. It shows that even in these circumstances incremental but significant progress can be made and discusses the strategies that were used to push for change.

The Eastern Caribbean: Opportunities amidst constraints?

In the Eastern Caribbean, debates around social protection emerged largely as a response to macroeconomic concerns. The 2008/2009 food, fuel and financial crises resulted in a significant slowdown in economic growth, extensive job losses and declining remittances. The downturn reflected and exacerbated long-term structural problems. Eastern Caribbean countries are not only characterized by a narrow economic base and a small population size but are also among the most highly indebted in the world.⁷ Declining donor assistance and susceptibility to natural disasters place further strain on these economies.

As a result, recent social protection reforms have been driven by the quest to reduce public debt and enhance 'competitiveness',



following the policy prescriptions of international financial institutions. These have included recommendations to downsize public services—the largest source of employment in the region—and reduce social spending.⁸ Greater targeting of social protection to the poor is often put forward as a way to achieve the latter.⁹ This context of fiscal adjustment provided limited space for rights-based, gender-responsive social protection advocacy, given that the creation of comprehensive social protection systems generally requires the allocation of more rather than fewer resources. In addition, actors who could have pushed for more gender-responsive alternatives to contractionary fiscal policies were in a weak position. Civil society groups, including women’s organizations, have been plagued by a chronic lack of funding that has weakened their capacity to mobilize knowledge and resources for advocacy.

Governments, in turn, have been reluctant to embrace the idea of state-civil society partnerships, and participatory policy-making spaces remain limited.¹⁰ While National Women’s Machineries could play an important role in advocating for gender-responsive social protection, their remit and authority in the Eastern Caribbean is limited by a lack of human, financial and technical resources.¹¹

It is in this context that UN Women’s office in the Caribbean joined the social protection reform debate, which here focused specifically on social assistance. In doing so, it found opportunities amidst the constraints described above by focusing its advocacy efforts on two key goals: ensuring that adjustment-driven reform measures do not disproportionately affect women; and widening the boundaries of mainstream thinking by making women’s needs visible. Building alliances, leveraging technical expertise and gaining access to key policy spaces were the strategies used to achieve these goals.

Building alliances: Partnerships and joint advocacy agendas

Driven by concerns about the impact of economic crisis on vulnerable populations, UN Women, the United Nations Children’s Fund (UNICEF) and the World Bank conducted Social Safety Net Assessments in six Caribbean countries in 2009/2010: Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, Saint Lucia and St. Vincent and the Grenadines (see Figure 1). The assessments revealed a number of common challenges, including the need to streamline the plethora of social protection programmes implemented by different ministries; improve their targeting mechanisms; generate central beneficiary registries; and create robust monitoring and evaluation frameworks. They provided the basis for multilateral engagement on social protection in the region, including technical support to Eastern Caribbean governments funded by World Bank loans and grants.

The assessments also gave rise to the UN Joint Programme on Social Protection, co-led by UN Women and UNICEF. The alliance with UNICEF proved critical for the advocacy gains

FIGURE 1 Timeline



described in the following section. The two organizations developed a shared vision rooted in human rights and gender equality, coordinated the recruitment of technical experts and successfully ‘acted as one’ in their advocacy with governments and other development partners, emphasizing the interdependence of children’s rights and gender equality. In addition, UN Women mobilized and supported women’s groups in Antigua and Barbuda to influence the country’s Social Protection Bill. One of the concrete results of this process was a document of key asks on gender-responsive social protection that women’s groups rely on for their engagement in national consultations.¹²

Leveraging technical evidence: Credibility on strategic issues

Technical credibility was key to UN Women’s engagement. In order to communicate effectively with technocrats and policymakers, the organization contracted the technical expertise of feminist researchers with international experience in two strategic areas: beneficiary targeting and conditionalities. Both issues were the object of intense debate, with gender and human rights implications at risk of being marginalized. The use of sound evidence and convincing analysis enhanced UN Women’s credibility among governments and development partners, such as the World Bank and the Organisation of Eastern Caribbean States (OECS), and allowed the agency to push for a more gender-sensitive targeting mechanism and a more critical appraisal of conditionalities.

Beneficiary targeting: Uncovering gender bias, proposing alternatives

A human rights approach to social protection holds that eligibility criteria should be transparent and gender sensitive and should minimize the exclusion of potential beneficiaries.¹³ While universal programmes usually perform best in this regard, they were not a realistic option under the constraints laid out above. UN Women hence chose to focus on improving beneficiary targeting in ways that would enhance women’s access to social protection.

Following the Social Safety Net Assessments, the six Eastern Caribbean countries started to develop proxy means tests (PMTs) as part of their social protection reforms. As with standard means tests, PMTs are used to determine eligibility, and a threshold is defined below which households are considered poor and hence eligible for social assistance. While standard means tests are based on household or individual income, however, PMTs use a combination of non-income characteristics as a proxy for income.¹⁴ In the Caribbean, the proxy variables—such as spending on food and non-food items—tend to be derived from expenditure surveys. Given that income data was perceived as unreliable, PMTs were proposed as a more robust, transparent and objective alternative.¹⁵

Yet, UN Women’s analysis of PMTs in the region revealed serious gender biases that were not in line with international best practice.¹⁶ In particular, it showed that sex-differentiated equivalence scales¹⁷ were used widely to assess poverty. Instead of a ‘per capita’ household expenditure, these scales established a ‘per male adult equivalent’ expenditure, dividing total expenditure by the sum of the individuals, with women counting as only a fraction of men. In Saint Lucia, this differentiation started at the age of one year, discriminating directly against girls by assigning them less weight than boys.¹⁸ While children are often assigned a lower weight than adults, there is no evidence for girl children having lower nutritional needs than boy children. As for adult women, their nutritional needs may sometimes exceed those of men—during pregnancy, for example—a situation that was not accounted for. In addition, non-food expenditures can be significant for women (e.g., menstrual hygiene supplies) and children (e.g., diapers, clothing, school transport). By failing to accurately capture these, the PMTs underestimated the numbers of women and girls in poverty, disproportionately excluding single-mother households and households with a higher proportion of female members.

Based on this assessment, UN Women generated recommendations on how to improve the gender sensitivity of PMTs in the region. In response, the Government of Saint Lucia eliminated sex-differentiated equivalence scales and raised the weight assigned to children—a measure that also benefits women, because they are more likely to live with children. Alongside UNICEF, UN Women had argued for raising the low weight accorded to children by drawing on expert opinions that hold that non-food expenditures incurred in respect of children tend to be more substantial in middle-income countries such as Saint Lucia than in low-income countries; and that childhood deprivation has long-lasting impacts on individuals, families and the country as a whole.¹⁹

UN Women also convened virtual knowledge-sharing workshops with Grenada and St. Kitts and Nevis, to raise their awareness and to propose alternative targeting approaches, and lobbied the Caribbean Development Bank, the main sponsor of poverty surveys in the region, which committed to abandon the use of sex-differentiated scales for its poverty estimates.

Conditionalities: Questioning their introduction, making women’s needs visible

A second entry point for UN Women was on conditionalities, which are the requirements beneficiaries are expected to fulfil to receive benefits. For example, women may be expected to attend parenting workshops or take children for health checks. A human rights approach to social protection holds that States should refrain from the introduction of conditionalities.²⁰ Where these are imposed, care should be taken to avoid unnecessary burdens on women and prevent stigma and abuse by the authorities. If services are inadequate or inaccessible to

women, non-compliance should not lead to their exclusion from the programme.

While policymakers in the Eastern Caribbean were not completely swayed by human rights arguments, UN Women's advocacy led to a discussion about different types of conditionalities and the actions necessary to reduce their demand on women's time. With support from the World Bank, the Government of Saint Lucia, for example, has been considering conditionalities such as compulsory parenting classes, health screenings and school attendance. UN Women effectively used a gender-aware assessment of the country's Public Assistance Programme²¹ to reveal the disproportionate burden of childcare and domestic responsibilities borne by women beneficiaries. Picking up on the demands that women beneficiaries had expressed themselves, UN women held that additional measures were needed in order to offset the increasing demands on women's time that compliance with conditionalities would likely entail. These included affordable childcare and transport subsidies, both of which were costed and presented to the Government.²² Influenced by UN Women's advocacy, the World Bank put forward similar measures in its own recommendations.²³

Gaining access: Spaces for knowledge sharing among key stakeholders

Operating within a wider regional coordination body—the Eastern Caribbean Development Partner Group on Poverty Reduction—allowed UN Women to share its knowledge and programming successes with national governments, influential donors, financial institutions and other development partners.

At the sub-regional level, UN Women supported the OECS in establishing a Technical Working Group on Social Protection and a Council of Ministers of Human and Social Development. These spaces provided direct access to policymakers and an opportunity to influence their agendas. The Technical Working Group comprises the most senior technical government officers responsible for social protection, while the Council of Ministers is staffed by the highest level of political decision-makers when it comes to social protection. UN Women directly engaged with both groups, sharing concerns and proposals regarding means testing and conditionalities.

At the national level, UN Women took advantage of a space for dialogue and knowledge sharing that Saint Lucia's Permanent Secretary had established with the aim of identifying the technical support to be provided by the World Bank, UNICEF and UN Women. This allowed for a critical and constructive discussion of approaches to social protection with the World Bank based on the knowledge products developed by UNICEF and UN Women. While there was not always agreement, there were clear instances of impact, as the example of the inclusion of childcare services shows.

Overall, the experience of UN Women's social protection advocacy in the Caribbean highlights that the engagement of gender equality advocates in social protection reform debates can and does make a difference—even in unfavourable contexts characterized by a weak economic base, high debt burdens, limited fiscal space and weak institutional structures. It is also clear that the gains made in this process were only a first step towards truly universal and gender-responsive social protection systems in the region.

RECOMMENDATIONS

- **Leverage relevant technical expertise on gender equality and social protection: Advocacy arguments are stronger when informed by technical knowledge and analysis to 'make the case'**
- **Engage strategically in joint partnerships and collaboration: Being seen as a visible and collaborative partner provides a platform for ensuring that gender equality concerns are heard, including in fora that are not normally considered 'gender spaces'**
- **Create spaces for advocacy and knowledge exchange with key stakeholders responsible for policy development: Engaging technocrats, senior public officers and other policymakers provides an opportunity for advocacy and knowledge exchange**
- **Balance human rights arguments with institutional efficiency arguments: In addition to gender equality and human rights arguments, data and evidence can be used to demonstrate that gender-responsive measures will enhance the efficiency and effectiveness of social protection reform more broadly**
- **Engage and support gender advocates in civil society and the state: While this proved difficult in the Caribbean, it is essential in order to ensure sustainability as well as gender-responsive monitoring and evaluation**

The policy brief series synthesizes research findings, analysis and policy recommendations on gender equality and women's rights in an accessible format. This brief was produced by Isiuwa Iyehen, Programme Specialist, at the Caribbean Multi-Country Office. To see endnotes and full bibliography visit: <http://unwo.men/diJF3ogboqe>