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TC Assignment: Gender Inequality and Social Exclusion in MPRLP Final Report ©

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Abbreviations and Acronyms

DGEO	District Gender and Equity Officer
DPSU	District Project Support Unit
GAD	Gender and Development
GOMP	Government of Madhya Pradesh
MPRLP	Madhya Pradesh Rural Livelihoods Project
PFT	Project Facilitation Team
SPMU	State Project Management Unit
TCPSU	Technical Co-operation Project Support Unit
WBR	Well-being Ranking
WID	Women in Development

This report is prepared by consultants, Dr Disa Sjoblom and Anthya Mudiath and should not be taken to represent the views of Department For International Development, MPRLP and TCPSU / Enterplan.

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Executive Summary

Executive Summary

The objective of this report is to review how the Madhya Pradesh Rural Livelihoods Project (MPRLP) has addressed gender inequality and social exclusion in its first phase and to give recommendations for improvements in Phase 2.

Gender Inequality

In the tribal villages of Madhya Pradesh extensive gender inequalities prevail at household as well as community level. Women are often the key players in economic activities, especially agriculture, but have limited control over decision-making and expenditure. By and large women remain excluded from community affairs unless there are development interventions which have promoted their participation. The approach of MPRLP has been a focus on women's practical needs such as reducing drudgery through provision of smokeless chulas and drinking water stands and to address women's extensive health problems. Less effort has been made to mainstream gender relations throughout the project. There are however some promising initiatives such as training of female panchayat representatives and training women on improved agricultural practices.

It is suggested that gender equality is given a higher profile in MPRLP Phase 2 by addressing gender issues in the project log frame. A gender strategy should also be outlined to create a consensus within the project vis-à-vis gender. More emphasis needs to be placed on the fact that men also have gender identities and that understanding and working with men's attitudes becomes important to create equality. Gender mainstreaming needs to become integral to Phase 2 and skills of gender focal staff as well as others will need to be built. Handholding support through a resource group of specialists will be more effective than one-off training events.

Social Exclusion

Despite a common notion that inequality is fairly low in tribal areas, there are many factors at play leading to certain groups and households being excluded from community affairs as well as mainstream development initiatives. Apart from gender, other factors that exclude people are, for example, ethnicity, clanship, illness, patron-client relationships and high levels of migration. Although the project design of MPRLP has taken account of the fact that social exclusion is an important determinant of poverty, there are no clear strategies outlined for reducing the same. Excluded households are often not able to participate effectively in the Gram Sabha. Moreover, the project design and framework of benefits is homing in on the enterprising poor and the Gram Sabha has not been induced to actively seek out strategies to mitigate exclusion from project benefits.

For Phase 2, it is recommended that MPRLP, first of all, acknowledge the existence of social exclusion in the project. As with gender, there is a need to more clearly bring out the importance of social exclusion in the project memorandum and log frame. Capacity of staff to understand and identify social exclusion needs to be built so that they in turn can work with the Gram Sabha to develop ways to reduce exclusion.

1 | Introduction

1 Introduction

The purpose of this report is to review briefly the ways in which the Madhya Pradesh Rural Livelihoods Project (MPRLP) has addressed gender inequality and social exclusion in Phase 1 (2004-2007) of the project and suggest ways of improving this during Phase 2. The study forms part of a pre-design exercise carried out to inform the continuation of the project. The terms of reference is attached as Appendix 1. However, it was agreed with the senior manager of the Technical Co-operation Project Support Unit (TCPSU) that the ToR was somewhat ambitious given the short time-span available and, hence, the report does not contain as much detail as outlined in the ToR.

The study was carried out in October 2006 by Anthya Madiath and Disa Sjoblom. The team visited three districts, i.e. Jhabua and Badwani in the West and Shahdol in the East. Five villages were visited and discussions were held with gender focal staff as well as other staff of the project.^{1/}

The report is divided into two parts. Part A is an assessment of the way the project has dealt with gender inequality and Part B is a review of strategies to mitigate social exclusion.

^{1/} See Appendix 2 for Itinerary

2 | Gender Equality in MPRLP

2 | Gender Equality in MPRLP

What is Gender Equality and Why is it Important?

Gender equality can broadly be understood as ‘a situation in which women and men have equal access to and benefit from resources, decision-making and opportunities to enhance personal well-being.’^{1/} Inequality in gender relations originates in the social, economic and power relationships between women and men that have been socially constructed over a very long period of time.

Gender equality is a goal that has both equity and efficiency dimensions. In the context of a human rights based approach to development, the promotion of gender equality is an important end in itself, grounded in fairness and social justice. Gender inequality is also, however a source of economic and social inefficiency that prevents the achievement of other goals. Evidence demonstrates that when women and men are relatively equal, economies tend to grow faster, and the well being of men, women and children is enhanced.^{2/}

Since the early 1980s there was a growing recognition that women had often been left out of development initiatives and that more efforts were needed to ensure their participation. This early approach is often referred to as the ‘Women in Development’ (WID) approach. Characteristic of the WID approach was the outspoken focus on women as a specific target group, considering them almost as a separate sector. However, many donors eventually found that such an approach tended to marginalise women as they were deviated from mainstream activities. This realisation resulted in the emergence of a ‘Gender and Development’ (GAD) approach which is commonly based on the premise that greater equality between men and women has to be mainstreamed at all levels and every step of a development initiative. The thrust of gender mainstreaming is thus to make sure that gender-sensitive approaches become routine in all work of an organisation or project, rather than confined to the work of particular staff or certain project initiatives.^{3/} While the historical and theoretical base for WID and GAD may seem straightforward, it is often common to find a twin-track approach in implementation.^{4/}

It is now widely agreed that work towards gender equality needs to include men as well as women and recognise the different needs and interests of both genders in a given context. Men committed to gender equality are often successfully involved as agents of change.^{5/} Whilst specific gender issues differ between sectors, experience indicates that the strategies and processes involved in promoting attention to gender issues as well as the constraints encountered are very similar in all sectors and organisations. It is also widely agreed that change in gender relations requires sound strategies, monitoring and continuous reflection and learning.^{6/}

1/ Waterhouse and Sulan Huq (2004)

2/ Kanji (2000)

3/ Akpalu et al (2000)

4/ Seeley and Kiran (2006)

5/ Akpalu et al (2000)

6/ Kanji (2000)

Increasingly there is also a recognition that more attention needs to be paid to men in creating gender equality- not just because men need to be sensitive to women's development and acknowledge women's needs, aspirations and rights, but because men too have gendered identities which are maintained through social relations. Hence, it is often suggested that rather than simply focusing on men as a group with power or as oppressors, it may be more useful to identify certain attitudes and behaviour of men that are problematic and look for ways to alter these.^{7/} For example, numerous studies suggest that most cultures promote an achievement-oriented masculinity for boys and men with the objective of males becoming providers and protectors. Boys are socialised to be aggressive and competitive while girls are taught to be non-violent and sometimes to accept men's violence and oppression.^{8/}

MPRLP and Gender Equality

Gender Relations in the Project Area

When gender inequality is discussed with MPRLP staff at district level it is still common to find people who subscribe to the view that tribal societies are by and large fairly equitable and that this also applies to gender relations. Visits to any village coupled with short discussions with women as well as men will however bring to light a host of practices that are widely understood as socially constructed inequitable relations between men and women. These lead to the subjugation of women in most spheres of life.

Besides carrying out the majority of the tasks related to agriculture, women in some of the tribal areas still remain largely confined to their homestead. Community affairs are invariably run by men unless there has been an external initiative that has promoted inclusion of women in the public domain. Within the household women do most of the labour, but have limited control over decision-making and resources. Female-headed households face multiple vulnerabilities as they often lack access to land and vital social networks in the community which are predominantly based on male kinship relations. The subjugation of women also results in fewer opportunities to access health facilities and education.

Female-headed households often belong to the poorest households of a village as they lack the protection and support of a male which is the basis for many community relations. In some communities however informal social protection systems have evolved for poor households through which, for example, other villagers provide grains.^{9/}

Migration has long formed a regular part of the livelihood pattern of the tribal population of Eastern as well as Western Madhya Pradesh. Understanding gender is critical in the migration context, but projects such as MPRLP has so far not systematically explored what migration does to gender relations. Experience shows that migration can provide new opportunities to improve women's lives and change oppressive gender relations in the favour of women as they may move away from a traditional patriarchal context. However, migration can also deepen traditional roles and inequalities and expose women to new vulnerabilities as they may encounter 'verbal, physical and sexual abuse, poor housing and encampments, sex-segregated labour markets, low wages, long working hours, insecure contracts and precarious legal status.^{10/} Women who stay behind while men migrate often have to shoulder multiple responsibilities and an increased workload. However, male migration may also be liberating as women get more space to manage the household and make decisions that otherwise would be the privilege of men. Hence, migration may impact gender relations in

7/ Cornwall (2000)

8/ Barker (2003)

9/ There is a recognition within the project that female headed households face multiple problems and currently a study is being conducted to understand more about the prevalence and problems of female-headed households.

10/ Jolly and Reeves (2005)

diverse ways and MPRLP would need to understand more about this so as to identify what opportunities and constraints migration causes for gender equality.

How is MPRLP Addressing Gender Inequality?

Project Design and Gender

Gender equality finds very little space in the Project Memorandum of MPRLP (2004). The key strategic message from the social appraisal is that the project needs to develop and implement a gender strategy based on the Government of Madhya Pradesh's women's policy. The earlier as well as revised logical framework does not contain any issues related to gender equality.

The limited recognition of gender in key strategic documents has laid a weak foundation for strategic ways of addressing gender issues, and brings about a sense that gender equity did not carry a lot of weight when the project was conceived. As a consequence, despite substantial efforts by key staff gender equity lacks overall strategic direction in the project and leaves much to be desired. A project specific gender strategy has not been developed to date and staff operating at district as well as cluster level found the state government's women's policy far too abstract to support them in planning and implementation.^{11/}

The observation of the team as well as many staff met is that the absence of an operational gender strategy that can be comprehended by all project staff has seriously hampered the progress on gender equality. As a result, the work carried out by gender focal staff is often left to good intentions.^{12/} This also results in gender being regarded and worked on in isolation rather than mainstreamed throughout the regular work of the project. Moreover, staff met also felt that the lack of a gender strategy has contributed to reduce the overall importance given to gender within the project at large.

Project Approach

The team found that the project approach to gender equality is based on a mixture of initiatives and activities that can be said to relate to women's practical and strategic needs as well as women's empowerment more broadly. There is, for example, throughout the project work with adolescent girls to increase awareness about adult life and thus prepare girls for womanhood. Another main initiative is to bring about awareness on women's health and reproductive issues through informal discussions and health camps in liaison with the health department. A specific initiative widely promoted by the project is the use of locally produced sanitary napkins to reduce infections caused by unhygienic ways of using traditional cotton cloth. The project has promoted a wide range of drudgery reduction interventions such as smokeless chulas, fibre sheets (to increase light inside houses), sanitation kits, pressure cookers etc. Although many of these interventions have proved useful for women as well as the household at large, some items have been less practical and some not suitable for the local context.^{13/}

11/ The MP State Women Policy is an overall document that covers a host of aspects ranging from pre-natal sex-determination to promotion of women's land rights. It lists 148 action points, but it does not contain any operational details for how these are to be taken forward. GoMP (undated)

12/ In one district visited the DGEO had initiated the development of a log frame for gender that forms the basis for activities as well as work plans of gender focal staff in the district. While this is a very useful initiative driven by a desire to make the work more strategic, the framework developed could have been much better if there had been an overall strategy to work with and if gender issues had been included in the project log frame.

13/ E.g. pressure cookers are not managed properly which makes them burst; fibre sheets are not practical in certain areas where there is a double roof. (see also ANUPA undated)

Although health improvement and drudgery reduction are very important issues from a women's development perspective and has often served as entry-points and a means to build rapport with women, it must be noted that both have limited relevance for the wider objective of MPRLP.^{14/} Substantial time and energy are currently spent by gender focal staff on these activities and it is evident that this approach has contributed to making gender a separate rather than integral or mainstreamed part of the project. This was an observation made by the team and echoed by some gender focal staff met in the field.

An effort that relates more closely to the overall aim of the project is the initiation of a training programme for elected women representatives which hold promise for creating a more gender nuanced Gram Sabha. Apart from this initiative, which will take time to mature, MPRLP has clearly had an impact on women's participation in the Gram Sabha although the nature of participation may still be fairly passive in many places. As of now, women are at least present which gives them an opportunity for exposure to the project activities as well as government initiatives more broadly. PFT members met provided the team with several vivid explanations of women presenting their proposals in the Gram Sabha although we did not get an opportunity to observe this. This indicates that there will be substantial variation in the nature of women's inclusion across the project area depending on the local context as well as the approaches taken by the PFT. Understandably it will take time for women to start discussing and negotiating at a public forum that had till now been the prerogative of men.

Another strategy also closely linked to the overall project objective is the training of women as well as men for improving agricultural operations including livestock rearing. This is based on an understanding within the project that the bulk of agricultural operations are carried out by women and yet it is often men who receive training on agriculture by external agencies. By strengthening women's technical knowledge they will be in a better position to participate in decision-making related to agriculture. Some PFT members met were very clear that a husband and wife should be trained together as this will promote joint planning and decision-making and hence promote equality within the household more broadly. In line with this the project has initiated training of selected husband-wife teams as champions for improving agricultural practices. However, it has often been noted in other similar initiatives that technical skills are not enough to promote equality. A better understanding needs to be created within the project whether improved skills also mean that women control a greater share of household income, or simply provide extra labour for activities controlled by the husband.

A few gender focal staff met had also developed an understanding of the fact that working towards gender equality requires taking men on board. One staff member explained how they 'sell' women's involvement by discussing with men how their wives can be more helpful to the prosperity of the household by improving their skills and being more exposed to the external world. In one village visited women's heavy workload had been discussed with men as well as women at several occasions – one woman met maintained that on the basis of this her husband had started helping her more around the homestead! Such cases may be rare but point to the fact that making even small changes in established gender relations is possible with appropriate support from outside. Much more could almost certainly be done by using selected men as 'agents of change' at community level.

As suggested above the current strategy for working with gender issues is based on a mix of approaches and initiatives, some of which are more in line with the project objective than others. The key constraint identified is that a great deal of the gender related work takes place in isolation and that there are very limited efforts for gender mainstreaming.

14/

As per the current log frame the indicators suggest that livelihood improvement will be measured in terms of increased incomes, reduced food deficiency, reduced distress migration etc.

Monitoring and Evaluation

The current routine monitoring system of MPRLP includes very limited data for tracking progress on changes in gender related issues. Monthly physical monitoring includes progress on 'gender' measured in terms of number of trainings, health interventions, awareness campaigns, financial aspects of SHGs etc. While tracking physical progress is necessary from a management point of view there is a need to develop monitoring of changes in attitudes and behaviour. Such monitoring is often difficult to capture at scale and may best be tracked through case studies. The qualitative monitoring of gender should be developed as part of other qualitative monitoring that the project decides to undertake.^{15/}

Organisational Framework

MPRLP has developed an organisational structure in which gender issues are coordinated at state level by a State Gender and Equity Coordinator and at district level by a District Gender and Equity Officer. At PFT level one of the staff members acts as gender focal person. While due attention has been given within the organisational structure to gender by engaging focal staff at all levels, there are other factors limiting the organisation to fully engage with gender equality in a constructive way. These factors are described below.

One of the key obstacles raised earlier is the lack of a practical gender strategy, consensus and clarity within the organisation on what gender means and how to take it forward within the project. Gender focal staff in PFTs pointed out that their duties are not spelt out anywhere but that they had been recruited with a broad understanding that they will work with women's participation and development in the project. In the view of the team the absence of a clear job description may not be a key issue had there been a gender strategy to work with.

Limited understanding of gender equality is a key barrier towards advancing work at field level. The knowledge about gender relations varies among gender focal staff, but by and large there is limited clarity and consensus at district as well as PFT level. The lack of skills on gender issues originates in limited experience of many staff members who have been recruited for the purpose. Difficulty in identifying people with practical exposure is perhaps the key reason for the limited awareness among staff. However, one person met maintained that the recruitment process for gender staff at PFT level had been far less thorough than for other staff as it was simply not considered as important. Although there have been some efforts to build capacity of gender focal staff, more comprehensive and regular initiatives are required. Training on gender mapping has been carried out in all districts, which has given some clarity to staff in terms of the concept of gender as well as some practical ways for how to analyse gender relations and identify and prioritise problems. Much more is however required to impart skills that will translate into improved ways of working.

The team noted that there are also substantial differences in the understanding of and recognition of gender inequality among other than focal staff. Although SPMU is regarded as being highly supportive of the work of gender focal staff, this has limited impact across the project as they're in no agreed comprehensive strategy for gender equality. While a few people displayed a high level of awareness about gender based on experiences from other projects, some people met had a very restricted outlook. In some districts and clusters gender is not considered as very important and is consequently not taken very seriously in programming. SPMU has recently initiated a gender sensitisation programme for staff. The effectiveness and impact of these needs to be followed up.

MPRLP does not as of today have a human resource policy. Consequently, there are also no systems in place for gender sensitivity and equality at the workplace. The absence of a HR

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An MIS is currently under preparation. However, the project also needs a comprehensive framework for M and E of which gender should form a part.

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policy also means that there is no formal grievance procedure for staff. As there have been allegations of harassment of female staff, the lack of a proper procedure to deal with the situation has delayed action. Mobility of women is a key issue at PFT level, and partly at district level. One way of dealing with this has been to ensure that women staff travel along with male staff members to the villages. While this is working well in some areas, in others male staff have begun to feel that they have to travel to a village just to accompany the gender focal staff without themselves having any work in that area. Some people met suggested that there should be at least two female staff members in the PFT. Besides this partly solving the mobility issue, it may also make female staff feel less vulnerable amongst a group of men. There is however a danger in making gender concerns the sole responsibility of female staff and it may have a positive impact to have a few more men working with gender issues and vice versa women staff with agriculture or other technical issues. In the next phase the work plans of gender and other staff need to be much more synthesised to enable mainstreaming.

Ways to Strengthen Gender Equality in Phase 2

In this chapter we outline a set of suggestions for how MPRLP may become more gender sensitive and approach gender equality in a more strategic way. The recommendations are basically divided into strategy and capacity-building

Develop a Gender Strategy and Focus on Gender Mainstreaming

MPRLP is in dire need of an overall gender strategy that clearly spells out for everyone where the project is heading vis-à-vis gender. The strategy needs to have a vision and be linked to the wider programming of MPRLP. Once the strategic direction of Phase 2 has been worked out a gender strategy should be put in place as a matter of urgency. Based on discussions with gender focal staff and observations drawn it is recommended against allowing districts to evolve their own gender strategies- this creates confusion and lack of direction.^{16/} One way forward may be to create a small working group within the project that could outline the strategy with the help of external facilitation and then invite comments from a wider internal group. In the making of a gender strategy it should be kept in mind that the process will be equally important as the output; it will give staff an opportunity to jointly learn about gender and plan how to move forward.

In MPRLP 2 there needs to be a greater realisation that promotion of gender equality needs to be preceded by extending gender analysis to include an understanding of the fact that men also have gender identities and that these are developed and maintained through interactions between men and men as well as men and women. Focusing on certain aspects of men's attitudes and behaviour and how these are produced would be a useful way forward. For example, the project is currently focusing on adolescent girls and how to equip them to be better prepared for womanhood. From a gender equality perspective, it would be equally important to focus on young boys and their perceptions about themselves and the opposite sex as way to prepare boys for a more gender equitable adulthood.

Gender issues need to be much more clearly addressed and explicit in the Phase 2 project log frame. Inclusion of gender at purpose level as well as having a specific output that relates to the implementation of the gender strategy would be a way forward. This will bring gender concerns more upfront and enhance the likelihood of gender becoming a higher priority than what is currently the case. A gender-sensitive log frame will also strengthen the case for gender mainstreaming throughout the various livelihood activities that the project will work with. Furthermore, this can be used to induce staff to develop their work plans in a way that makes gender integral to the activities. To achieve this gender focal staff must act more as

16/

Districts and clusters may evolve their own framework and approaches linked to a project generic gender strategy.

resource persons to other staff and less as direct implementers of women's development activities that have limited relevance for the purpose of the project.

In order to counteract the resistance that often emerges when projects make gender issues more explicit, it may be fruitful to make gender equality a part of a wider social development agenda (see Part B on social exclusion). It was widely agreed by gender focal staff met that there is a need to address social development issues more broadly and thus situate gender in a wider context.

To understand and monitor progress towards gender equality the project needs to have a monitoring system that can reflect small as well as major change taking place at field level. Such monitoring may focus on attitudes and behaviours and best be carried out as qualitative and participatory monitoring of selected case studies of villages and households at regular intervals. A small number of indicators can be decided on in advance, and if possible, these may even be included in the project log frame.^{17/18/} To make monitoring part of a learning process it is important that observations are shared and discussed among gender focal staff as well as more widely. The Monitoring and Learning staff within the project should take a lead on this to ensure that gender related work becomes a wider responsibility.

Enhance the Organisational Capacity to Work with Gender Quality

The capacity of staff to work with gender issues needs to be enhanced if gender is to become more integral to programming. The team suggests that more intensive handholding support is extended to gender focal staff at district and PFT level so that they can build their skills through 'on –the job-training' and receive practical support in their strategic as well as day to day based work. As the concept of gender is often quite abstract for development practitioners, training programmes are limited in terms of improving the way people work and 'hand-holding support' is often found more pragmatic and useful. The handholding support may be managed by a small resource group of gender/social development specialists who may also be used for other social development related work (see Part B).^{19/} This would make the inputs more comprehensive and wider than just a focus on gender and this would be in line with the wider thinking of the project that gender focal staff should also focus on other issues of equity. It is recommended that a group of two to three people are engaged for this purpose over an extended period of time (say one year). This will enable proper planning and follow up of the work. This approach will also be much more cost-effective than simply engaging consultants to review what has not happened and make recommendations that may or may not be acted on.^{20/}

Apart from building capacity of gender focal persons, other staff will also need to improve their understanding of gender equality and understand why it is important for the success of MPRLP. This may be approached through interactive gender sensitisation workshops in which selected project champions (especially male who have done some constructive work)

17/ Examples of indicators could be: shifts in the gender division of labour; women's confidence in raising their concerns at household and community level; women's control over household income; women's reports of positive changes in behaviour of husbands; men's reports about changes in their behaviour towards women within as well as beyond the household.

18/ Even though the log frame is a useful overall management tool it needs to be kept in mind that not all dimensions of a project can be purposefully captured in the log frame.

19/ The SPMU Gender and Equity Coordinator plays this role partly, but it is impossible for one person to provide the backstopping support needed throughout the districts.

20/ The resource group may start with facilitating the development of a gender strategy. Subsequent tasks should include; support to planning for gender mainstreaming at district and PFT level; facilitate the inclusion of gender and other social development aspects into the monitoring system of the new phase; undertake gender sensitisation of staff; support to carry out gender and social development M and E, etc.

can play a key role to further the importance of gender issues. Gender sensitisation events will not change attitudes of people but at least it will send a message that senior management takes gender seriously and give staff an opportunity to reflect and widen their understanding.

Work on the ground on gender issues needs to be accompanied by a gender sensitive human resource policy which includes the development of specific procedures for gender-related grievances such as unfair treatment, discrimination or sexual harassment. Mobility of female staff is a main issue that the organisation has partly tried to tackle. Recruitment of additional female staff and a better gender balance of staff working with technical sectors as well as gender focal persons could also be a way forward. Having men working with gender issues have been found to be very effective in other projects. If the project expands to further areas in the next phase, care should be taken to recruit additional staff with solid social development expertise to the extent possible. If staff cannot be found with adequate expertise, the resource group can build up skills after recruitment. The challenge will be to find people with the right aptitude.

3 | Social Exclusion in MPRLP

3 Social Exclusion in MPRLP

What is Social Exclusion and Why is it Important?

In every society there are always some groups that are marginalised for different reasons and in varying degree. Until recently, mainstream poverty analysis has tended to ignore the social dimensions of such inequalities.^{1/} Investigations into the persistence of poverty even in situations of economic growth have highlighted the significance of forms of disadvantage which revolve around social identity and reflect the cultural devaluation of some people based on who they are (or rather who they are perceived to be).^{2/} Contemporary human development discourse recognises this phenomenon as 'social exclusion'.^{3/}

At its broadest level, social exclusion has been defined as 'the process through which individuals or groups are wholly or partially excluded from the society in which they live'.^{4/} Social exclusion is also described as a dynamic process, through which some disadvantages lead to some exclusion, which in turn leads to more disadvantages and more exclusion and ends up with persistent multiple (deprivation) disadvantages.^{5/} In this definition, both the process of becoming poor, as well as the outcomes of deprivation is important.^{6/}

People may be born into an excluded group (in the case of ethnicity, caste, or being born with a disability), or may become excluded either due to changes in circumstances (such as migration, acute illness, or disaster) or to chronic processes (such as long-term unemployment). People may also be excluded because of where they live (for example, people who live in remote areas or slums). There is no single criterion for identifying the socially excluded, nor is it always agreed who the socially excluded are in a given society. This is why the identification of criteria for social exclusion in a particular context is one of the primary tasks for social exclusion analysis.

Social exclusion is not coterminous with poverty (e.g. it is possible to be excluded without being poor), but seeks to provide a broader view of deprivation and disadvantage than poverty. More specifically, social exclusion can be viewed as an analytical concept which directs us to the way in which social structures can generate poverty, but which extends beyond explanations of social or material deprivation to include an analysis of the way in which social institutions function and develop.^{7/} Social exclusion is a long-term multidimensional process that focuses not only on who is being excluded, but also on the institutions and resources from which they are denied access. It also helps us to identify the power structures, institutions and political actors who maintain and encourage processes of exclusion.

1/ Kabeer (2006)

2/ Ibid

3/ The concept of social exclusion was first developed in industrialised countries to describe the processes of marginalisation and deprivation which can arise even within rich countries with comprehensive welfare provisions. The concept has been gradually extended to developing countries.

4/ European Foundation for the Improvement of Living and Working Conditions, 1995. Quoted in de Haan and Maxwell (1998: 2)

5/ Eurostat Task Force (1998)

6/ Laderchi et al (2003)

7/ Gore and Figueiredo (1997)

Social exclusion is both a cause and a consequence of poverty. The fact that many of the causes of social exclusion are also its consequences means that the problems are often compounded and therefore more difficult to tackle. The most socially excluded are very hard to reach. Their problems are multiple, entrenched and often passed down the generations. Their poverty is, not just about poverty of income, but poverty of aspiration, of opportunity, of prospects of advancement.

Social inclusion relates to affirmative action to reduce inequalities between the least advantaged groups and communities and the rest of society by closing the opportunity gap and ensuring that support reaches those who need it most.

MPRLP and Social Exclusion

Social Exclusion in the Project Area

Despite a widespread notion that tribal societies of Madhya Pradesh are based on egalitarian practices of community life, there is in reality substantial differences in social and economic relations at inter- as well as intra-household level within as well as between villages. Although the stark contrasts of multi-caste villages may not be found in tribal areas, there are apparent strands of difference that impact on entitlements and access to resources of different households.

In the project villages, the power and social capital of a household is determined by factors such as ethnicity^{8/}, clans, lineages and agnatic (male) ties. Households that have settled late in a village or reside in the wife's village often have limited or no ownership of land and lack social networks and alliances to draw on to advance their development. Such households along with those which are female-headed, lack an economically active member, or have a member who suffers from a chronic illness or disabilities are often the poorest in a village. Involuntarily or voluntarily such households tend to be excluded from community life and many of the mainstream development initiatives in tribal areas do not reach them.

How does MPRLP Address Issues of Social Exclusion?

Project Design

Comprehensive ways of mitigating social exclusion are not discussed in the Project Memorandum of MPRLP. Nevertheless, there appears to be a tacit understanding that the Gram Sabha, which has been charged with the authority to approve and monitor village development plans, will also ensure that people are not excluded as the project focus is on strengthening the livelihoods of the poorest groups. As per the Project Memorandum, process documentation is meant to capture who amongst the poor are excluded and why and how the project is reaching them. However, process monitoring of this nature has not yet been initiated within the project.

The selection of Livelihood Promoters from amongst marginalised groups is intended to mitigate capture of benefits by village elites. Project design also charges the multi-disciplinary Project Facilitation Teams (PFTs) at cluster level with the task of ensuring a pro-poor focus of the Project. The Livelihoods Forum at state level is expected to contribute towards generating knowledge and learning about the multiple causes and dimensions of poverty and what works when trying to reduce poverty.

Despite these provisions, social exclusion does not emerge as a specific focus of MPRLP's design.

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Tribal sub- groups in the state have evolved differences in social standing. For example a Bhilala will not eat in a Bhil house.

Project Approach

Exclusion from the Gram Sabha

MPRLP has given the Gram Sabha a pivotal role in decision-making. In the past, the Gram Sabha was not conducted regularly. The attendance of women and poor households was low^{9/} (see also Part A of this report). The Gram Sabha was also known to be a forum that was dominated and run by the village Sarpanch, the Panchayat Sachiv, their cronies and other powerful local elites.

Phase I has largely focussed on regularising the conduct of the Gram Sabha and improving the attendance of women and poor households. Despite some success, it would seem that participation, particularly active participation of weaker sections continue to be dogged by deep-rooted social prejudices and tendencies. Traditional patron client relationships,^{10/} social relations including gender inequality and political affinity are some of the underlying factors that influence the extent and quality of participation in the Gram Sabha. Furthermore, the capacity of poor households to participate is hindered by their non availability in the village for long stretches in the year as a result of migration, their inability to trade a day's wages to attend a meeting, or simply due to their lack of belief in the system and most telling of all, the lack of the capacity to aspire for a better deal for themselves. When they do participate, they lack the confidence to voice their problems and needs.

Box A: The Case of Buna bhai*

Buna bhai, a Bhil tribal, has three sons and a daughter. They do not go to school. Looking at his frail wife, it would be hard to tell that a fourth child is on the way; such is her emaciation. Except for a small run down shack and a strong sense of belongingness, there is nothing else that binds Buna bhai and his family to Tejaria, his wife's village. Buna's father died when he was a child. Buna bhai's father was also landless.

Yet year after year, Buna bhai and his family return to Tejaria just before Holi. They stay in the village until Diwali soon after which Buna bhai and his entire family, migrate in search of casual work since there will be no demand for casual labour in the village until the next agricultural season.

Though the Gram Sabha was meeting that day in Tejaria, Buna was busy sowing maize to earn a day's wage to feed his family. The last time he went to the Gram Sabha was in March this year. He seems to have gone to this meeting at the suggestion of the Livelihood Promoter who told him that could get chickens from the Gram Sabha if he went. Since nothing came out of his attendance at the Gram Sabha and his subsequent visit to the PFT office, Buna bhai seems to have lost the last spark of aspiration. Diwali is a few days away and it is almost time to leave Tejaria in search of work.

*Note: the name has been changed to protect the identity of the individual

Exclusion from the Benefits of the Project

MPRLP essentially uses three processes to identify the poverty situation and livelihood needs at household level. These are: a door-to-door survey, well-being ranking and micro planning. Well-being ranking is meant to categorise households using locally determined criteria into four categories: a) well off, b) manageable, c) poor and d) very poor. In practice, however only the first three categories are in use. This effectively means that all types of poor households are clubbed together in category C whereas it is a well-known fact that poverty is not a homogenous phenomenon and that some poor households are more enterprising and capable of coping than those more severely crippled by poverty. The end result is not surprising. MPRLP is benefiting the more enterprising among the poor. It is not succeeding in

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Catalyst Management Services Pvt. Ltd. (2006)

Traditional patron-client relationships are expressed in feudal tenancy, money lending, political patronage, or mafia protection. Horizontal relations outside those of the influence of the patron are actively discouraged.

identifying, reaching and benefiting households that are often excluded from mainstream development initiatives and are at the bottom of category C. The approach to poverty assessment will obviously need to be based on a much deeper and nuanced analysis and understanding of poverty in a village. This will require a special focus within the capacity building programme for field staff.

The livelihood support that MPRLP has to offer tends to favour those who are economically active. Not much thinking it would seem has gone into identifying opportunities to suit those who are completely dependent on daily labour and are deprived of productive assets. For instance, most project districts have chosen to offer livelihood support as loans and not grants, a policy that deters the poorest households from approaching the Gram Sabha for support because of their inherent inability to take big risks. It also deters the Gram Sabha from lending to the poorest because of their inability to repay loans. Even where grants not loans apply, the conditions are not entirely transparent. Each Gram Sabha takes its own decisions. PFT's claim limited influence over the decision-making process as it plays out in the Gram Sabha. The role of the PFT comes into play before the Gram Sabha through the identification and empowerment of marginalised and excluded households to the point when they are ready to go to the Gram Sabha with a concrete proposal.

Though in principle, the bulk of MPRLP support is intended for poor and very poor households, by default access to these opportunities is restricted because the policy in use at Gram Sabha level is not pro-poor and the decision-making body, the Gram Sabha, is not under any constitutional or legal obligation to operate under a pro-poor bias nor has it been capacitated to do so. This is tantamount to project induced exclusion.

Ways to Mitigate Social Exclusion in Phase 2

As discussed above, there is evidence of social exclusion within MPRLP. Several aspects such as low social capital, widowed women heading households with young children, extreme poverty, very high dependence on migration and so forth, seem to come together to reinforce this exclusion.

To start with it is important to acknowledge the existence of social exclusion within the project, to bring it on to the agenda and to raise the awareness, understanding and sensitivity of project staff on what is social exclusion and how it manifests itself at village and project level. The next step would be to ensure that socially excluded groups, households and individuals are identified as part of the implementation process and to unravel the forms and levels of the exclusion they face and how this affects poverty. This would necessarily include working with the Gram Sabha to establish firmly the priority of excluded households within the project.

MPRLP would then require an approach that is sensitive towards excluded households and adapt strategies that respond to their diverse needs. Some of the responses may be similar to those suggested for chronically poor households in the pre-assessment study on Social Protection, i.e. a combination of social protection measures and asset building.^{11/} However, it is important to bear in mind that social exclusion is not the same as chronic poverty but more of an analytical concept focussing on the processes and social institutions that make people face different forms of poverty.

A resource group, as suggested under the gender section, may be engaged over a longer period of time to support the implementation of a sharper focus on social development related issues such as social exclusion. As with gender, staff capacity has to be built, a strategy has to be developed, and an M and E system needs to be put in place. Social

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Sjoblom and Khatana (2006)

exclusion also needs to find a place in the project logframe of Phase 2 at purpose as well as output level.

A1 | **Terms of Reference**

A1 | Terms of Reference

Background

MP has a large population of Scheduled Tribes (20 percent) and Scheduled Castes (15.5 percent), who are amongst the most marginalised and vulnerable. Out of an estimated population of 60 million, 75 percent are rural with 37 percent of the rural population estimated as living Below the Poverty Line (BPL).

The ability of the rural poor to enhance their livelihoods is constrained by a range of inter-related structural, social, economic and institutional barriers. The situation of the poor is characterised by marginal and under-productive landholdings, periodic droughts, insecure land tenure and a reliance on seasonal agricultural and forest labour. The low population, relative isolation and inadequate reach of infrastructure in some districts increase the costs of delivery, resulting in poor access to agricultural inputs, extension services, credit and markets. The rural poor in forested areas, particularly tribal populations, are dependent on forest resources for subsistence, income and employment.

In order to enhance poor people's livelihoods in tribal dominated districts the Government of Madhya Pradesh (GoMP) has launched the Madhya Pradesh Rural Livelihoods Project (MPRLP) with support from the Department for International Development (DFID). This project addresses rural poverty and creates sustainable livelihoods in selected villages that are achieved by focusing on regeneration of natural resources and capacity building of local communities. The project will be run in two Phases. The first Phase became operational in 2004 and covers 822 villages in eight districts. (Badwani, Dhar, Jhabua, Mandla, Dindori, Anuppur, Shahdol and Sheopur).

For more information please visit www.mprlp.nic.in

Objectives

The overall objective of this assignment is:

- Prepare a position paper on the scope for promoting gender equity and social inclusion issues in relation to poverty reduction in MPRLP

Scope of Work (Conduct/ Kinds of Work)

This work will draw primarily on secondary sources and the experiences/ lessons from Phase 1. The consultant(s) will prepare a report of approximately 7,000 words of main text, with annexes as necessary covering the following policy areas:

- Background statement on the importance of addressing gender equity and social inclusion issues in relation to poverty reduction.
- Recent changes to relevant state and central policies, schemes, programmes that promote social inclusion and possible impact.

Within the state as a whole and specifically within the actual and prospective project districts:

- To provide a brief overview of the factors affecting social exclusion on tribal communities and the main constraints to addressing this.
- To review the strengths and weakness of MPRLP with regard to gender equality and social inclusion.
- To identify examples of good gender and social inclusion practices that may be used for wider lesson learning by district project teams across the project.
- To outline future initiatives for building the capacity of project teams and partner organisations to promote gender equality and social exclusion more effectively. This will include attention to the potential resources or inputs required to build such capacity over the medium term.
- To identify constraints to be addressed and opportunities and entry points that may be exploited in order to strengthen the promotion of social inclusion and gender equality.

A2 | Itinerary

A2 | Itinerary

Pre-Design Study on Gender and Social Exclusion

Itinerary

Date/Day	Activity
03/10/06; Tuesday	Arrived at Bhopal from Bangalore (late evening)
04/10/06; Wednesday	At TCPSU Travelled to Indore (evening flight)
05/10/06; Thursday	Travelled from Indore to Jhabua district by road Discussion with DPO, Jhabua (mid day) Visited NGO PFT (SAMPARK), Rama North Block, Jhabua district (afternoon)
06/10/06; Friday	Visited MPRLP PFT, Rama North block and village Tejaria, Jhabua district
07/10/06; Saturday	Travel by road from Jhabua district to Barwani district Held discussions with 10-12 PFT members from Barwani district at DPSU office (mid day) Visited BAIF village (name???) and PFT (evening)
08/10/06; Sunday	Visited Asha Trust, Pati block, and Poshpur village, Barwani district (morning) Travelled by road from Barwani to Indore (late afternoon)
09/10/06; Monday	Arrived at Bhopal from Indore (morning flight)
10/10/06; Tuesday	At Bhopal; Went to meet Tasneem, Gender Officer SPMU (mid day) Left Bhopal by train for Shadol district (afternoon)
11/10/06; Wednesday	Discussions with District Project Officer and District Gender and Equity Officer, Shadol district (morning) Visit to Gohapuru Block, Salda PFT and village, Amjhor (after lunch)
12/10/06; Thursday	Discussion with DGEO continued Discussion with DMLO Visit to PFT, Sontola Cluster and Sinduribharri village (afternoon) Left by train for Bhopal
13/10/06; Saturday	Returned to Bhopal Met Tasneem (afternoon) Met DGEO of Dhar
14/10/06; Sunday	At Bhopal

A3 | **References**

A3 | References

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