

Précis



Evaluating Gender and Development at the World Bank

THE MAJORITY OF THE WORLD'S POOR ARE WOMEN and children. Women provide most of the child care. In many poor countries, they produce half of the food, and they make up a quarter of the work force in industry and a third in services. Women are more likely than men to spend the income they control on basic welfare. But gender is a missing link in many development programs. Despite their economic importance, women are not represented proportionately among development's beneficiaries. Reducing gender disparities and helping women to participate in the economic development of their countries is critical to the World Bank's mandate to fight poverty.

The Bank was one of the first multi-lateral organizations to require staff to consider and address the impact of its assistance on women as part of a required sociological analysis during the appraisal of investment projects. Operational Policy 4.20, "The Gender Dimensions of Development," was issued in 1994 as part of the Bank's overall poverty reduction initiative. It complements project-level operational procedures and requires that gender issues be considered in the design of country programs.

In 1995 and 1997 the Operations Evaluation Department (OED) looked at the Bank's progress in gender. OED concluded that although there had been improvement,

there was a need to strengthen the integration of gender into Bank assistance.

OED will evaluate the relevance, effectiveness, and efficiency of the gender dimensions of the Bank's development assistance, with a report due in 2001. Consulting with donor representatives, Bank staff, and critical stakeholders in client countries, OED will examine the Bank's role in improving global public policy on gender, in mainstreaming gender, and in producing results that benefit men and women equitably.

The evaluation will address the following questions: Has the Bank effectively integrated gender into its country assistance strategies? Does that assistance





Woman carrying water, Burkina Faso. Photo courtesy of World Bank photo library.

meet the development objectives of client countries? Has it produced sustainable outcomes, impacts, and institutional strengthening? What has the Bank done right? How can it be more effective?

Voices from the Frontlines of Gender Policy

During a recent two-day workshop and one-day roundtable, senior policymakers and specialists in gender and evaluation from around the world discussed issues relevant to the proposed evaluation of the gender dimensions of Bank assistance. The workshop highlighted the complexity of gender issues and the variety of views on effective approaches to addressing them. This *Precis* offers summaries and highlights of the views expressed by the participants in those discussions.

Why Is Gender Mainstreaming Difficult?

What does it mean to mainstream? Something is said to be mainstreamed when it is so routine that it provokes neither conflict nor comment. Computerization of office work, the numbering of streets, and sending six-year-olds to school are all illustrative of the concept of

mainstreaming. Gender mainstreaming can result in different types of interventions:

- Investing in special programs for women (such as girls' schooling)
- Designing projects to meet existing gender conditions and to account for the different needs of men and women
- Designing policies, programs, and projects to transform the existing gender system (for example, ensuring that parents voluntarily invest in girls' education).

Box 1. The Gender Policy of the Bank

SUCCESSIVE GENERAL COUNSELS HAVE ASSISTED the Executive Directors in interpreting the Articles of Agreement in response to the changing needs of the Bank membership. There is no doubt that raising women's productivity would improve key development goals everywhere and directly reduce poverty. Failure to address this aspect of development work could lead to inefficiency, exacerbate inequities between men and women, and threaten the sustainability of development efforts. From the point of view of Bank staff, work on gender is not only permissible under the Articles of Agreement, but also required by the policy framework of the institution. There is a specific policy on gender, approved by the Executive Directors and reflected in OP 4.20. The OP includes management instructions to the staff, and results directly from a prior strategy paper on gender issues. Women's issues need to be considered in the design of poverty programs and taken into account to mitigate any adverse effects. This policy is linked to other operational policies dealing with poverty reduction, indigenous peoples, and involuntary resettlement. In dealing with gender issues, the Bank has been rendered most effective by listening and consulting with member countries.

Source: Based on A. Rigo, "Gender and the World Bank Mandate." In *Evaluating the Gender Impact of Bank Assistance* (Washington, D.C.: OED, 2000).

Gender issues are sensitive because they touch people personally. Gender work has to do with ideas, culture, and social capital; mainstreaming is about power, equality, and politics. Equality is not manifested in the same way in different societies, but once we understand its nature, we can identify local indicators.

Participants felt that gender issues could be mainstreamed into a development bank's traditional lending portfolio, into new areas that expand that portfolio (such as early childhood development or the control of violence), or into reimbursable instruments (investing in, rather than assisting, women). Mainstreaming may work best in new or emerging fields, such as violence reduction or support for microenterprises, where learning is going on and there is more openness to new ideas.

There was no clear consensus among participants on the issue of mainstreaming. The paradox of mainstreaming is that success often renders the issues less visible, yet specific projects aimed at women lead to their marginalization. Some argued that there is still a need for projects specifically targeted to women, or an approach along the lines of Women in Development projects in parallel with mainstreaming. Many others argued that only transformational macroeconomic policies grounded in concrete strategies will have a sustainable impact. More progress has been made on women's issues than on poverty issues, they noted, but the answer is not 20 million small women's projects. We need major leaps forward in conceptual frameworks, resources, and strategies.

Some championed project-level work because client governments implement projects, but their executing agencies tend to be weak, overextended, and sometimes dysfunctional, struggling to deliver basic services. Task managers are overworked, and gender issues must contend for limited resources with other concerns. Rather than lobby for support from the top, some Bank staff work from the bottom up, establishing credibility with task and sector managers, demonstrating the value of gender work through solid empirical research, and using the techniques of social marketing (identifying target groups and appealing to their interests).

Is Economic Policy Gender-Neutral?

Several participants noted that macroeconomics is not gender-neutral; it is blind. For one thing, there is a clear bias in property and inheritance law. For another, only paid work is considered productive, so most women's work does not count toward the gross national product (GNP). Policymaking that ignores gender often produces sexist outcomes. Developing countries spent 67 percent as much on their militaries as they spent on education and health in 1989, for example, compared with 28 percent in industrial countries. Structural adjustment hurts poor women more than it hurts poor men. Under structural adjustment, governments cut the budget to achieve fiscal equilibrium, but savings in the *productive* sector create more work in the *reproductive* sector, where women are overrepresented. Market forces modify gender relations, and gender relations modify market forces.

Gender is a development issue. Men and women have different consumption patterns, different savings patterns, and different spending patterns. They are affected differently by macroeconomic variables. While universal approaches to gender analysis will not work, the Bank can arrive at some universally valid conclusions on which to build country strategy. Where women have been permitted

to participate in development activities, for example, development assistance has been more effective. When more women are literate, a country is likely to develop faster. And access to water and to microcredit can transform women's lives, and thereby their families.

Overcoming Institutional Resistance to Gender Analysis

Development is social transformation, and culture is no more a barrier than development itself. How do we uncover the values in the development community that hinder the consideration of gender issues? We do so by examining work practices and by giving voice to those who are silent in an organization. Power is not necessarily gendered, but analyzing an organization's deep structure often reveals dysfunctions of power and hierarchy that discourage risk-taking and openness to innovation.

Most organizations are structurally biased toward men's interests or are exclusionary along critical dimensions that perpetuate gender inequality—the separation of work and family, for example, or the split between paid work and family life. The assumption that work has the first claim on an individual does not fit women, who are mainly responsible for family and community work. It devalues women's interests within the organizations that could support their family roles and the restructuring of family

responsibilities, and it is perpetuated in such management and control processes as job evaluations. Valuing individualism and competition over teamwork and cooperation tends to celebrate heroes (usually men) and end products, usually sidelining the client. Valuing quantitative goals (such as the delivery of inputs) rather than the overall mission (such as social change) also inhibits work toward gender equality.

Efforts to create special offices and ministries for women fail in countries where the women's movement is weak and gender issues are fragile and depend heavily on personal and political will. It is more effective to get women into the mainstream, where men hold power and can respect women for their expertise, than to appeal to a male sense of gender equity. Even if we promote projects and programs with all good intentions, they will not succeed unless women negotiate successfully with men. Tackling gender equity from the perspective of women's economic contributions opens doors to mainstreaming gender. Economic arguments can be persuasive in convincing people of the need to do something for gender equality. Women's government offices and ministries can generate more power by developing alliances with other offices and ministries.

Twenty years after the issue was identified in the development community, why does gender remain a missing link in many development programs?

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Where Should the Bank Go Next?

Some participants felt that the Bank should emphasize policy dialogue, in which it has a comparative advantage and can be a catalyst for change, rather than intervene at the micro level, where other institutions normally have the advantage. If a small women's group is trying to scale up the insurance portion of an initiative, for example, but encounters policy and regulatory constraints because the state is geared toward big insurance companies, the most important thing the Bank can do, besides providing funding to help the women get insurance, is to persuade the government to reform regulations that prevent women from getting insurance.

In the view of other participants, the Bank should understand not only how social and political constraints limit women's productivity, but also how households and firms respond to adjustment policies. It should know whether assessments incorporate men and women, or only women, because the results could differ significantly. An intervention should be judged not by using partial measures of behavioral response, but by looking at the impact on total well-being, because changes in behavior do not necessarily improve women's livelihoods. Raising school fees might not damage household budgets much in the short term, but in the long run a whole generation of girls might have only a marginal opportunity to go to school.

Working with country governments, the Bank must identify gender imbalances and their root causes, eliminating gender disparities in the short term and root causes in the medium term. Bank policy is partly to ensure that assistance generates an equitable impact on men and women, but equal access to benefits is not necessarily equitable. Women are less privileged, a problem that can be solved only by providing them with additional resources.

Other participants felt that the Bank's gender policy is appropriate, but remarked that policies are only as good as the people who implement them. The Bank has not fully institutionalized gender mainstreaming. For most projects, gender analysis does not appear in documents presented to the Board. Bank lending in education, health, and population has increased, but the Bank has not consistently increased lending for credit to women. It could do so, by encouraging countries to require preferential credit for women in microenterprises, for example. The Bank seems hesitant to address gender issues through special women's projects, but can mainstream projects targeted to women by integrating a capacity-building component for women and making concerted efforts to strengthen women's leadership skills.

Economists at the Bank, it was noted, seem to need further evidence that gender issues are important. Bank staff must be told that if they are not considering gender issues in their work, they are not doing their work well. But it is also important to provide the incentives and information the staff needs and to give borrowers the incentives they require to increase the involvement of women in development.

Some participants felt that implementation has stood still partly because the Bank is not allocating sufficient resources to gender issues. Too few social scientists knowledgeable about gender issues are available to design programs, projects, and participatory evaluations, and capacity is strained.

Improving Evaluation

Over the past few years, OED has focused on evaluations at a country level which make it possible to evaluate an assistance strategy's consistency over time and across sectors. Project objectives should be diagnosed in such a way that project achievements can be monitored and linked to outcomes. But country-level evaluations pose new challenges. What are the metrics for evaluating gender-disaggregated impact at the country level? Against what counter-factuals does one assess the results of Bank assistance? How does one disaggregate results and attribute them to Bank assistance?

It is difficult to observe and measure gender mainstreaming when the Bank incorporates new features into projects in all sectors rather than creating gender-specific, stand-alone projects. In its revised strategy for gender mainstreaming, the Bank's Gender Sector Board emphasizes giving Bank staff the tools and information they need to do more analytical work (to demonstrate gender equality's relevance to poverty alleviation) and helping in-country agents who are working to change gender relations.

Attributing the impact of an intervention is difficult if one has to rely on proxy indicators, but with participatory evaluations—with the beneficiaries themselves doing the analysis—it is easier to identify links and causes. Organizations assume women are disadvantaged and offer them a prescription, hoping it will help. But poor women recognize their disadvantages and can articulate areas for change. Project evaluators should ask: Were women involved in selecting the project? Were women involved in designing and implementing the project? Did women have access to the resources and benefits the project produced?

Lessons Learned

There is often a disconnect between the poor and those who represent them. Gender inequities persist and often prevent poor women from speaking for themselves. The time has come to speak about the economics of gender, and the World Bank should lead the way. It is time not for review, noted one participant, but for action.

Assistance should be targeted at "equality of results," aiming for less total inequality rather than for equal benefits for men and women from a particular project. It should support alleviating policy and legal constraints and other factors that limit women's capacity to benefit from, and contribute to, long-term development; modifying legal frameworks to ensure that men and women have equal rights; seeing that the new laws are

Box 2. Why Should Countries Disaggregate Data by Gender?

WOMEN CUSTOMARILY MANAGE MULTIPLE ROLES SIMULTANEOUSLY, WHILE MEN TEND TO HAVE FEWER and more distinct roles, which are sequential. Women's roles typically include reproduction, household maintenance, production of goods and services, and community management. Donors and governments often overlook the implications of differences in men's and women's roles for project design and implementation.

It is difficult to evaluate the gender impact of projects that are not designed with gender objectives in mind. But since the unintended effects of projects are often different for men and women, even on apparently gender-neutral projects, it is important that gender-disaggregated data be collected. In Mali, for example, improving rice production raised total household income and output, but changed power relations and resource allocation within the household, with negative effects on health and nutrition indicators.

In Europe, four types of macroeconomic models with gender dimensions are being developed:

- Disaggregating the impact of macroeconomic or other variables by gender to identify gender differences
- Introducing gender dimensions to selected macroeconomic variables, such as savings and expenditures
- Dividing the economy between sectors of production (the traditional macroeconomic variables) and reproduction (unpaid work; noncash goods and services; and, most important, social networks)
- Combining all three.

Without gender-disaggregated data, it is impossible to measure an intervention's gender-related effects. And not all developing country cultures are sensitive to the need to collect national data, much less gender-disaggregated data. The Bank should support country institutions in collecting, analyzing, and using data as the basis for policy analysis and formulation. It should also encourage stronger feedback about project design to improve evaluation.

implemented effectively; strengthening the database for gender analysis; giving countries more appealing incentives to borrow funds for gender issues, in the same way funds to improve the environment must be made more appealing; and incorporating gender issues in policy-based operations.

Participants suggested that the Bank should also:

- Demonstrate to staff that gender issues can make a difference. Zero in on key messages econometrically.
- Work in ways that encourage a country to own the issues. Identify the key change agents and support and develop them, encouraging a culture that accepts innovation. Encourage staff to change their views and approaches as needed, especially on issues as sensitive as gender.
- Pay special attention to staff who have been unable to mainstream gender because they do not know how, rather than because they do not want to.
- Give staff the incentives and information needed to integrate gender issues and to build into loans the incentives for borrowers to increase them.
- Raise gender awareness in the country team, get the team on board, and have it take the time to listen to clients at the grassroots. Women themselves recognize their disadvantages and can articulate areas for change.
- Start small, build confidence, and move toward larger-scale interventions as understanding and confidence grow. Start with projects likely to offer encouragement, rather than with the most difficult activities.
- Focus on the largest constituencies first in devising methods to provide support and to build people's leadership capacities.

- Collect gender-disaggregated data, the only basis for measuring interventions' impacts on women. But remember that it may be more useful to look at women over time or to compare women with other women than to overemphasize women's relative differences from men.
- Enrich gender analysis with participatory approaches, such as workshops and focus group discussions, which yield a diversity of views.

Advice for OED

In its broad evaluation of Bank gender work, participants felt that OED should ask: Has the Bank done everything in its power to bring about gender equality? If not, why not? If yes, with what results? Evaluation should be simple and straightforward, examining beliefs and attitudes as well as action (the three are interactive, not sequential).

- Consider fundamentals. Can the Bank influence local beliefs and values? Can it influence institutional development? Does it understand how gender issues are played out in government, markets, and civil society? In a global knowledge economy, will the distinctive voice of women and their critical role in forming social capital gain in importance?
- Other participants felt that five years is too short a time to evaluate the impact of the Bank's gender policy. Ask, instead, whether the Bank has shifted its development assistance to sectors that help, involve, and empower women and generate results that benefit them. Key areas to measure would be literacy, health, population, and microcredit.