Mainstreaming Gender and Development in the World Bank
Progress and Recommendations

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Preface

More than three decades have passed since the issue of women’s role in development was first placed squarely on the international agenda at the 1975 First World Conference on Women, held in Mexico City. Since then numerous fundamental changes have been introduced by policymakers and practitioners working on issues related to low-income women in developing countries. Two issues stand out as particularly noteworthy: the shift in focus from women in development (WID) to gender and development (GAD) and the widespread efforts made to mainstream gender and development into operational practice in a wide range of government, nongovernmental, bilateral, and multilateral institutions.

The World Bank is no exception. Over the years different regions, departments, and divisions have sought to develop new policies, approaches, and tools for mainstreaming gender into the World Bank’s operational work. Despite these efforts the Bank still lacks a common, institution-wide rationale, common language, and clearly defined policy approach to gender and development. Increasingly, country clients and operational staff have expressed confusion regarding appropriate language, procedures, and tools to be used in their day-to-day work.

The creation of the World Bank’s Social Development (SDV) Family in 1997 provided the opportunity for a Bankwide review of existing gender and development rationale, language, and operational procedures from a social development perspective, which could, in turn, contribute toward mainstreaming gender and social development into the Bank’s lending and nonlending operations at the policy, program, and project level.

The review focused on a number of types of World Bank materials, including gender-focused documents (such as gender policies, country gender studies, and gender action plans) and non-gender-specific documents (such as social development and participation action plans). It also included a brief review of the gender policy documents of a number of bilateral and multilateral development institutions. In addition consultations were held with staff both inside and outside the World Bank. The review also examined the extent to which social assessments, as the most important Bank procedures related to social development, had mainstreamed gender to provide guidelines to assist task managers. Other Bankwide procedures, such as poverty and environmental assessments, remain to be reviewed.

Consultations with the Bank’s Gender and Social Development Thematic Team during the
course of the review led to the conclusion that the findings could be of relevance to all Bank staff concerned with the operational mainstreaming of gender and development. Consequently, the document was expanded to be of relevance throughout the Bank.

The findings and recommendations in this volume cannot provide all the answers; ultimately, a considerable amount of work remains to create a Bankwide consensus on an issue as complex as gender. Nevertheless, a stock-taking review of this sort is intended to contribute to the ongoing debate on mainstreaming gender in development in the World Bank; hopefully it will assist in reaching final conclusions on this important process.

Caroline O. N. Moser
Acknowledgments

This volume is based on a review and consultation process carried out between February and July of 1997 by Caroline O. N. Moser, in collaboration with consultants Annika Törnvist and Bernice van Bronkhorst, for the Social Development Family of the Environmentally and Socially Sustainable Development Network of the World Bank, under the direction of Gloria Davis.

A number of people assisted the authors in this work; their contributions are gratefully acknowledged. The World Bank’s Gender and Social Development Thematic Team provided advice and consultation throughout the writing and review process. Members of the team include Lynn Bennett, Mark Blackden, Maria Correia, Christine Jones, Veena Mayani, Josette Murphy, Michael Bamberger, Monica Fong, Wendy Wakeman, Najma Siddiqi, and Sonomi Tanaka. World Bank NGO liaison officers provided useful feedback during a session held at the World Bank NGO Specialist Learning Forum in May 1997.

Gender specialists outside the World Bank provided important alternative institutional perspectives on mainstreaming gender into their organizations. These included Misrak Elias, chief, Gender and Development Programme Section, UNICEF; Ana Maria Brasileiro, chief, Latin America and the Caribbean Section, UNIFEM; Rosina Wiltshire, deputy director, Social Development and Poverty Elimination Division/Bureau for Policy and Programme Support (BBPS), United Nations Development Programme (UNDP); Sarah Murrison, programme officer, Social Development and Poverty Elimination Division/BBPS, UNDP; and Stephanie Urdang, consultant.

Useful documentation was received from gender specialists of the Canadian International Development Agency, Swedish International Development Agency, Danish International Development Cooperation, Netherlands Development Cooperation, and the British Department of International Development. Support for consultants was provided by both the Netherlands and Swedish World Bank Consultant Trust Funds.

This document was presented to the Gender Board in February 1998; final Social Development Family reviews and clearances for the ESSD Series/Social Development Subseries were provided by Lynn Bennett and Cecilia Valdivieso of the World Bank.

The authors also wish to acknowledge the editorial contributions of Alison Raphael, and publishing coordination by Bonnie Bradford, Alicia Hetzner, and Virginia Hitchcock. Gaudencio Dizon desktopted the volume.
CHAPTER 1

Introduction

This report presents the main findings of a recently completed desk study undertaken for the Social Development Family of the World Bank’s Environmentally and Socially Sustainable Development (ESSD) Network. The primary objectives of the review are to: (a) identify the current rationale, language, and underlying policy approach to Gender and Development (GAD) adopted by the World Bank; (b) evaluate the extent to which these are shared across the institution; and (c) make recommendations concerning future steps toward mainstreaming gender in the World Bank. Although the origins of the review relate to needs specifically identified by ESSD, the issues raised go beyond social development, and are relevant to all Bank staff concerned with mainstreaming gender and development into World Bank lending and nonlending operations at the policy, program, and project level.

Review Objectives and Background

As new substantive or sector-level concerns arise (or reappear) on the development agenda, agencies such as the World Bank, governments, academics, and nongovernmental organizations (NGOs) all seek to reach institutional consensus concerning definitions and usage. This is essential to ensure consistently effective and sustainable interventions. It requires agreement on a common rationale, or justification, for the importance of the issue—whether it arises in a short mission statement, a ‘business case,’ or a lengthy policy statement. The consensus must also include acceptance of a common language and an understanding of the policy approach(es), or goals, underlying associated interventions.

Among the new issues that have arisen recently are the environment and the redefinition of poverty associated with the 1990 World Development Report on poverty (World Bank 1990b), 1991 Poverty Strategy, and the Poverty Reduction Handbook (World Bank 1993a). Another such issue is gender; 20 years of work in this area has placed it firmly on the World Bank’s development agenda (Murphy 1995; 1997). Reflecting changing approaches in development thinking, first Women and Development and then Gender and Development have been institutionalized in the Poverty Reduction and Economic Management (PREM) Network’s Gender Unit; in regional gender units/focal points; and, most recently, in the Social Development Family. The 1994 policy paper, regional gender action plans, and numerous sector-level interventions all represent important initiatives designed to operationalize gender concerns.

While World Bank task managers know that gender matters, they are less clear on two important questions:
1. Does the World Bank have a common rationale, language, and policy approach on gender?

Poverty-focused task managers across the Bank share a common rationale on poverty reduction that links labor-intensive growth, human capital, and safety nets. Is it not possible for task managers mainstreaming gender concerns collaboratively across sectors, disciplines, and regions to share a common rationale on gender and development?

2. What is a gender analysis?

Economists across the Bank share a common understanding of the components of a cost-benefit analysis. Do those concerned with mainstreaming gender issues into operations share a commonly agreed set of tools and techniques?

In taking stock of the current status of gender and development work at the World Bank, this review is driven by a concern to address these two questions. It was undertaken as a consequence of a number of initiatives relating to the recent consolidation of the social development agenda in the World Bank. These include, first, the completion of the Task Group Report, Social Development and Results on the Ground; second, the establishment of a Social Development Family within ESSD; and third, the preparation of regional social development action plans. In five out of six regions the integration of gender as a social development concern was identified as one of three top intervention priorities.

Two other recent, gender-focused interventions in the World Bank have also identified the importance of gender as a social development concern. The recent Operations and Evaluation Division (OED) Update on mainstreaming gender noted that "efforts in the Bank...to understand the social dimensions of development, and to involve stakeholders in decisions that affect their lives...should include gender concerns in order to be more effective." (Murphy 1997, 43). In addition the Report from The Committee on Development Effectiveness (CODE) on the OED Update stressed that "the Social Development Family should include in its forthcoming guidelines on social assessments a discussion of how to link gender analysis, stakeholder analysis, and social assessments." (CODE 1997)

Methodology

This study is based on an extensive document review and consultation process. Four sets of documents were reviewed specifically in terms of their gender rationale, language, and the policy approaches underlying recommended interventions. These documents include:

1. Formally cleared World Bank documents with a gender focus, including policy papers; country strategies; and regional-level social, participation, and gender action plans
2. Gender and development policy documentation from various bilateral and multilateral institutions
3. Selected social assessments, as the most important social development procedures, were reviewed in terms of their integration of gender analysis
4. Selected literature reviews of gender and development theory and practice.

Consultations were held with a variety of interested parties, including: World Bank staff both within and outside of ESSD, visiting World Bank NGO Liaison/Social Analysis officers from field offices, GAD staff at various New York-based United Nations agencies, and representatives of bilateral development agencies. The World Bank's Gender and Social Development Thematic Team provided an important peer-review function, commenting on early drafts and participating in a feedback session on the findings organized by the Leadership and Learning Center (LLC).

The review adopts familiar working definitions of a number of basic gender and development concepts. These include "sex and gender," "gender relations," "gender roles," and the critical distinction between WID and GAD (see box 1.1).

To undertake a comparative review it is also necessary to define a set of common organizing concepts with which to compare World Bank gender-focused documentation. These are derived from the extensive international gender and development analytical literature and
Introduction

Box 1.1 Brief definitions of basic gender and development concepts

*Sex and gender.* While sex refers to the biological state of being male or female, gender refers to the socially defined aspects of being male or female.

*Gender relations.* This refers not to men or women, but to the social relationships between them; like relations of class, ethnicity, nationality, and religion, gender relations are socially constructed. They vary across time and culture and are not fixed or immutable.

*Gender roles.* Those activities that are considered by a given culture to be appropriate to a women or a man. In most societies women have a triple role, including reproductive, productive, and community management activities, while men undertake productive and community political activities.

Women in Development (WID) or Gender and Development (GAD). While WID identifies women as a special, or separate, interest group, GAD identifies gender as an integral part of a development strategy. Under GAD the situation of women is no longer analyzed independently of, but rather in relation to, that of men.

Sources: World Bank (1994a); Moser (1989, 1993); Overholt and others (1985); Pfannenschmidt and McKay (1997).

its associated operational tools and analytical techniques. Four organizing concepts were identified to examine the gender rationale, language, and framework in each document (see box 1.2).

Diversity/differentiation. The first organizing concept identifies whether the document refers to men’s and women’s differences, either biological or social. More specifically, it reviews whether each document explicitly acknowledges gender roles, divisions of labor, or practical gender needs. Recognition of gender “difference” or “diversity,” however, does not necessarily imply an analysis of the underlying reasons for such differentiation.

Disparity in access to and control over resources and power. The second organizing concept addresses women’s and men’s access to and control over resources and power. “Disparity” refers to the imbalance in power relations between women and men, both in terms of decisionmaking and access to and control over resources. “Access” refers to use rights, and “control” refers to power over decision-making regarding resource allocation. This concept provides a deeper analysis of the dy-

Box 1.2 Organizing concepts to assess gender and development rationale, language, and policy approach

Diversity/differentiation
* Biological (sex)
* Social relations (gender) identified through:
  * Roles (reproductive, productive, community)
  * Gender division of labor/resources
  * Practical gender needs/interests

Disparity/access to and control over resources and power
* Access (rights) to household and community-based assets such as land and housing, labor, services, credit, knowledge
* Strategic gender needs/interests
* Control (power over) of these same assets
* Control (power over) of decisionmaking

Social institutions where constraints and opportunities occur in access, power, or participation
* Household: Intrahousehold access and control
* Inside/outside
* Community: Village committees/councils
* Market: Firms, corporations, farms, labor markets
* State: Legal, administrative, military, police
* Development institutions

Stated WID/GAD policy
* Welfare
* Antipoverty
* Equity
* Efficiency
* Empowerment/autonomy
* Equality

Sources: Overholt and others (1985); Moser (1989, 1993); SEGA (1996); Longwe (1994); UN (1995).
Mainstreaming Gender and Development in the World Bank

Dynamics of social relations between men and women, and why they may or may not change.

**Social institutions in which constraints and opportunities occur in access, power, or participation.**

The third organizing concept examines social structures by identifying institutional levels where opportunities and constraints may exist for women and men in terms of access to power and participation. The six types of social institutions identified here are not necessarily mutually exclusive; social institutions may exist at the household, community, market, or state level. Additionally, social institutions may be further characterized as inside/outside, or development institutions. This concept captures some of the structural barriers and opportunities in institutions that the concepts of “diversity” and “disparity” are not able to cover.

**Stated WID/GAD policy.** The fourth organizing concept identifies the policy of the document, whether stated or implied, regarding its WID or GAD approach. Policies are identified as welfare, antipoverty, equity, efficiency, empowerment, and finally, equality. The identification of a policy approach reflects the underlying rationale for implementing a particular strategy. The application of these concepts is illustrated in the detailed review of a variety of World Bank documents in appendixes 1-4.

**Notes**

1. See forthcoming Social Development Note entitled “Mainstreaming Gender into Social Assessments,” to be published by the Social Development Family.

2. The concept of gender diversity/differentiation is universal to all gender and development frameworks, including the Gender Planning Methodology (Moser 1989, 1993), the Harvard Framework (Overholt and others 1985), and the Longwe Method/Women’s Empowerment Framework (UNICEF 1994).

3. For detailed discussions on access to, and control over, resources and power see the Harvard Framework (Overholt and others 1985).

4. In her work on East Asia Lynn Bennett makes a distinction between the private and public spheres; women work primarily in the private sphere of the home, carrying out reproductive tasks, while men are outside the home in the public sphere where economic and political power is transacted (Bennett n.d.).

5. This draws on the social relations framework, from the Institute of Development Studies, Sussex (see Kabeer 1994).

6. The first four policy approaches are drawn from Moser’s work on gender planning (Moser 1989; 1993). Equality, the most recent policy approach, was added after the Fourth International Conference on Women, held in Beijing in 1995 (UN 1995). (For further description of policy approaches see chapter 3.)

7. To systematize the findings from the different documents reviewed, key concepts of diversity (D), access to and control over resources (A/C) and institutional level (L) are all included within the key concept column. For each document the goal/rationale and policy approach is separately identified. Figures in parentheses refer to the page number of the reviewed document.
CHAPTER 2

Review Findings: Searching for a Common, Bankwide Gender Rationale and Language

The following five findings synthesize the conclusions of the review:

1. World Bank policy documents on gender lack a common conceptual rationale, language, and underlying policy approach.

2. World Bank country gender studies and strategies—including gender action plans—vary extensively in terms of their conceptual rationale and language.

3. World Bank staff express a need to develop a common gender rationale and language, as well as tools and training for mainstreaming gender and development.

4. Most bilateral and multilateral are adopting a policy approach to gender that integrates equality and people-centered sustainable development, reflecting a combination of the messages from the Rio, Copenhagen, and Beijing summits.

5. World Bank socially related action plans have limited success in integrating gender as a social development priority.

Each of these conclusions is discussed in detail below, along with the implications for World Bank policy and programs.

Finding 1: World Bank Gender Policy

World Bank policy documents on gender lack a common conceptual rationale, language, and underlying policy approach.

The study reviewed four recent World Bank policy documents. The first two set out the Bank’s policy on gender and development and provide the operational directive that underpins it (see appendix 1).


The second two documents were originally prepared by the World Bank for distribution at the 1995 Fourth World Conference on Women at Beijing (Beijing Conference), and as such do not present specific Bank policy, although they raise a number of relevant issues about the institution’s policy and operational work.

- Towards Gender Equality: The Role of Public Policy, Development in Practice Series (1995i)
- Advancing Gender Equality: From Concept to Action (1995a)

The review identified a general movement away from a “Women in Development” (WID)
approuched toward one of “Gender and Development” (GAD) (see box 2.1). This shift did not occur in isolation. Just as in past decades paradigms for economic development have shifted, so too views about women’s role in the development process have undergone changes as women’s contribution to development has been reassessed. In this respect the World Bank concurs with the development community, following rather than leading the Bank’s 1994 Gender Policy (1994a) starts by identifying GAD as its framework, but frequently refers to women as a separate target group, rather than identifying women’s priorities or needs in terms of men’s; in addition the term gender is used interchangeably with women, such that the distinction between the two is not clear and the terms are often confused.

The accompanying Operational Policy (1994b) identifies policies in terms of gender, but target groups in terms of women as a separate group. For example, in the first paragraph, the document states that: “The Bank aims to reduce gender disparities and enhance women’s participation.” Similarly, it proposes gender-sensitive policies, but as a means of improving women’s access to assets and services.

In terms of policy approaches there has been a shift from a welfare policy approach targeting women as a “vulnerable group,” to one that emphasizes economic efficiency, which is identified as a direct link to the World Bank’s overarching mandate of poverty reduction. The Bank’s policy paper on gender, for instance, emphasizes the importance of “focusing on strong economic arguments showing that women can and must play a role in economic development.” (1994a, 15)

Coinciding with preparations for the 1995 Beijing Conference, the Bank’s Gender Policy also, however, endorsed a concern for social justice, stating that: “Investing in women is thus an important part of development strategy as well as a matter of Social Justice” (1995i, 14).

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*Source: Dayal and others (1993).*
Both of the World Bank documents prepared for distribution at the Beijing Conference refer to equality linked to efficiency as their underlying policy approach (see box 2.2). In the introduction, for instance, "Toward Gender Equality: The Role of Public Policy" states:

Persistent inequality between women and men constrains a society's productivity and, ultimately, slows its economic growth...This report is intended as a reference to strategies for promoting gender equality and, consequently, enhancing economic efficiency. (1995i, vii)

One of the most innovative aspects of the Beijing documents was the introduction and detailed analysis of intrahousehold dynamics, including a discussion of the unitary and collective household models. Here again, links to inequality are highlighted, as demonstrated by the following statement: "In recent years attempts to explain persistent gender inequalities in the accumulation and use of human capital have focused on the key role of household decisionmaking and the process of resource allocation within households." (1995i, 21).

Despite the challenging approach introduced in the Beijing document—linking equality to efficiency—the review found that this has not been adopted across the board as the Bank's policy approach to gender. While economic efficiency (not necessarily linked to equality) is probably the single most common approach adopted, it is by no means universal. An eclec-

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tic approach relying on a combination of all five policy approaches is more common.

Finding 2: World Bank Country Gender Studies, Strategies, and Regional Gender Action Plans

World Bank country gender studies and strategies—including gender action plans—vary extensively in terms of their conceptual rationale and language.

World Bank work on gender and development at the program and project level is highly diverse. There is ample variation not only in the quality of analysis, but also in the concepts and frameworks used by different regions and, within them, different sectors. A review of a number of the Country Studies series (1989-93) reflects this heterogeneity. (See appendix 2 for a detailed, comprehensive matrix.)

- The Kenya Country Study (1989a) focused on women’s roles in agriculture, treating women as a separate group rather than examining their roles in relation to those of men.
- The Turkey Country Study (1993), in contrast, analyzed changes in gender relations as the economy underwent a transition from agricultural production to industrialization. Key concepts such as gender-segregated labor markets, disparities, and gaps reflect an analysis that takes into account differences and institutions outside the household.
- The South Asian Country Studies (1989b, 1990, 1991) introduced a very different approach to gender and development with their key concept of “inside/outside (private/public) dichotomy.” According to these studies:

  - Part of the cultural definition of the female in India is her association with the inside, the home and courtyard where the family is cared for. This in contrast to males who belong outside in the fields and the bazaar, where livelihoods are earned and economic and political power is transacted. Since education, healthcare, and labor force participation all involve interaction with the outside, girls and women face special barriers in these areas. (1991)

This concept relates, to some extent, to differentiation, access, and control, as well as level of institutions, but is region-specific. The household is identified as a collective and the site of gender-based power variations and motivations. The emphasis is on removing gender-specific constraints and increasing women’s access to key inputs.

This review also identified variation within the same region (see appendix 2). While all three studies in the South Asia Region use the concept of inside/outside dichotomy, they differ in the use of other key concepts:

- The India Country Study (1991) uses the concept of gender and discusses “...ultimately changing the prevailing gender ideology.”
- The Country Study on Pakistan (1989b), in contrast, does not use the term gender but refers instead to women, identifying them as a separate, vulnerable group, and using terms such as “disadvantaged” and “discrimination.”

Other regional-level efforts, such as World Bank country gender strategies, also show differences in language and concepts used. For instance:

- The Nigeria Strategy (1992) focuses on understanding gender relations, women’s multiple roles, and triple burden and analyzing women’s productive and reproductive roles. It also focuses on gender-specific constraints to “human capital” and “economic productivity,” and gives specific recommendations on how to remove these constraints in different sectors and at different levels, such as training, health, agriculture, and the legal system.
- The El Salvador (Gender Approach) Strategy (1996d), in contrast, focuses on gender differences and stereotypes, gender-based behavioral differences, discriminatory practices and on how to “gender” institutions, recommending measures to mainstream gender into institutions undergoing modernization in a post-conflict context.

During the past three years World Bank regions have prepared and implemented a number of mandated action plans relevant to gender and social development. These include not only gender action plans (1997e), but also participation and social development action plans.
Regional gender action plans (RGAPs) reflect a variation in depth and use of concepts and frameworks similar to that of the country studies and strategies (see appendix 3A). Justification and stated policy vary widely, as the following examples from two very different regions of the world illustrate:

- The Latin America and Caribbean (LAC) Gender Proposal "sets out a program to promote gender-responsive development...that is, development that considers gender differences and constraints, and works towards reducing gender barriers." (1997b)
- The Africa Region Gender Action Plan (1997a) identifies gender as an issue of economic efficiency, stating that: "By identifying gender differentials in economic capacity as a key strategic issue for Africa, the RGAP reflects the centrality of gender in Africa's economic development...Gender-based discrimination limits economic growth. This discrimination markedly affects macroeconomic efficiency and equity."

The RGAPs illustrate the critical importance of contextualizing gender analysis and strategy within region-specific circumstances. The concepts used reflect regional similarities as much as differences—at times also including the dominant paradigms coming from the regions' women's NGOs and academics. The following example of the types of language differences that predominate in RGAPs from different regions reflects this diversity:

- Africa/ECA: Gender roles and differentiation
- South Asia: Gender ideology, gender-based disparities, inside/outside dichotomy
- LAC: Gender-responsive development.

Some RGAPs are highly detailed, with country gender profiles and individually tailored strategies for the different countries in the region. The Asia Region, for example, has gender profiles for most of its countries. Planned interventions, nevertheless, vary from the very practical to the more strategic. For example:

- South and East Asia have sets of country-specific actions and a set of region-wide actions. (1997h; 1996b)
- Latin America and the Caribbean has a general strategy for the whole region. (LAC Capacity Building on Gender 1997b and f)

- The ECA Region has adopted a strategy of "selectivity in terms of focusing on gender issues that have potentially large payoffs in terms of welfare and efficiency gains." (ECA Gender Action Plan 1997c, 1)

Concepts used in World Bank work on gender and development vary to reflect regional variations in the nature and intensity of gender-based disparities, as well as the receptivity of client governments. But even taking these variations into consideration, the concepts are frequently not clearly defined. Consequently, the same term may be used in different ways, making it particularly difficult to develop Bankwide indicators. For example, OED's evaluation of Gender in World Bank Lending Programs (Murphy 1995; 1997) uses the concept, "gender-related activity." Lack of a clear definition as to what constitutes such an activity not only means that it may refer to very different interventions, but also results in unsystematic monitoring of the mainstreaming of gender and development issues into World Bank lending operations.

The fact that OED was unable to use more specific indicators reflects the lack of a Bankwide set of definitions of key concepts and limits the utility of current evaluations. Recognition of the confusion resulting from the lack of a common rationale or clarity on concepts led Murphy to conclude her OED study by stating: "What is needed is a conceptual framework or an agreed upon mode of analyzing and using a gender perspective that suits or broadens the institution's objectives and information requirements. (Murphy 1995, 107)

Finding 3: World Bank Staff Consultations

World Bank staff express a need to develop a common gender rationale and language, as well as tools and training for mainstreaming gender and development.

Consultations held for this review showed that World Bank staff, such as task-managers and NGO liaison officers, have experienced problems as a consequence of the confusion in the Bank's rationale and language on gender. In one Central American country, for instance,
country clients experienced problems when different task managers working within the same project used different justifications and language for gender. While some viewed women as a separate "vulnerable group," suggesting a welfare approach, others recognized the importance of incorporating women into the project to ensure its effectiveness.

In addition, participants at the recent NGO liaison officer (NGOLO) Specialist Learning Forum argued that they can only communicate clear messages on gender and social development to NGOs and civil society in their countries if the World Bank is clear on its gender rationale and language. Ensuring that staff across the institution understand each other—in field offices as much as in Washington—requires the development of a common set of appropriate tools and techniques and their dissemination through training. Representatives from the Africa Region, in particular, prioritized the need for such tools and training (see box 2.3).

Finally, peer review by members of the Gender and Social Development Thematic Team provided an important confirmation of the need to develop an overall, Bankwide common rationale and language. While the team agreed that some lack of clarity is consistent with fundamental shifts occurring as the Bank's core mission has expanded from growth to poverty reduction (and most recently to inclusion and social justice), the team also noted that this is not an excuse for careless language or a lack of conceptual rigor. Within a common Bankwide rationale and language, regional-level justifications will vary in focus and emphasis; the critical point is that the two should not contradict each other (see box 2.3).

Finding 4: The Global Agenda on Gender: Equality and Sustainable Development

Most bilaterals and multilaterals are adopting a policy approach to gender that integrates equality and people-centered sustainable development, reflecting a combination of the messages from the Rio, Copenhagen, and Beijing summits.

This review also examined the rationale, language, and policy approach to gender and development in a number of development agencies outside the World Bank. This process involved a review of the policy documents of several bilateral agencies, as well as consultations with New York-based U.N. agencies such as the United Nations Development Programme (UNDP), the United Nations Children's Fund (UNICEF), and the United Nations Development Fund for Women (UNIFEM).

The review revealed that, as with different parts of the World Bank, the level to which a

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Box 2.3 Consultations on rationale and language for gender and social development

The NGO Specialist Learning Forum was held in May 1997 for Bank mission-based NGO liaison officers. During preparation the NGO coordinator found that participants did not identify gender as a priority issue. Nevertheless, given the importance of participation, social development, and gender action plans to NGOLO work programs, the forum included a one-hour session on "Gender Analysis: Mainstreaming Gender into Social Development."

After a brief overview of preliminary review findings, regional focus groups discussed the rationale for gender and social development as it relates to each region. This limited knowledge of gender by NGOLOs led to a clearly articulated demand from various regions for appropriate tools and techniques to mainstream gender into participation and social development work. Training was identified as critical, particularly by African NGOLOs.

Consultations were also held with the Gender and Social Development Thematic Team at the Social Development Family Retreat in May, 1997, providing an opportunity to share interim findings. Two questions served as the basis for discussion:

1. Do we need a common language for gender and social development?
2. Do we need a common justification for gender and social development?

While the group agreed on the need for Bankwide agreement on definitions of analytical concepts—using a common language and framework—the rationale or justification for gender and social development may vary according to region. Nevertheless, throughout operations it is important to move away from a rationale that defines women as victims or as a vulnerable group.
clear rationale has been developed varied be-
tween and within different agencies. Neverthe-
less, a number of informative trends can be
identified. First, an institution-wide common
mission statement, or guiding principle, is con-
sidered to be an essential starting point by all
agencies. Such a statement should be crafted
after considerable discussion and debate to
ensure institutional consensus. In this regard
other agencies seem to be far less concerned
with regional differences than is the case in the
World Bank.

Second, the current rationale on gender and
development in the agencies consulted has
been heavily influenced by the concepts intro-
duced during the three recent U.N. conferences
addressing socioeconomic issues, culminating
in the 1995 Fourth World Conference on
Women. Key concepts from each of these inter-
national conferences are reflected in the final
Beijing document.

- The U.N. Conference on Environment and
  Development (UNCED) held in Rio de
  Janeiro in 1992, for example, identified the
  concept of “sustainable development,”
  bringing environmental concerns to the core
  of the development process.
- The Social Summit, held in Copenhagen in
  1995, introduced “people-centered develop-
  ment,” reflecting the need for a participatory
  approach.
- The Beijing Platform for Action incorporated
  a policy of empowerment at all levels, and
  introduced a rationale of equality as a hu-
  man right:

  Equality between women and men is a
  matter of human rights and a condition
  for social justice and is also a necessary
  and fundamental prerequisite for equal-
  ity, development, and peace. A trans-
  formed partnership based on equality
  between women and men is a condition for
  people-centered sustainable development.
  (UN 1995) [Emphasis added.]

  Third, as illustrated in box 2.4, bilateral and
  UN agencies each maintain their own indi-
  vidual rationale on gender. At the same time,
to varying degrees, they have adopted the poli-

The following examples highlight some of
the rationales and language and policy ap-
proaches adopted by different agencies.

- Canada’s CIDA treats gender relations and
differences within an equity and efficiency
  approach.
- The Development Action Committee, which
  serves as the OECD’s counseling body on
gender, has adopted equality as a develop-
ment goal, as have Britain’s ODA and
Sweden’s Sida.
- The Netherlands in contrast, uses the con-
  cept of autonomy as the pillar of its policy.

Despite such differences in language, all
these institutions not only have clearly defined
mission statements, but also identify equality
at all levels in society as a policy goal. Such
developments provide useful lessons for the
World Bank as it moves toward formulating its
own approach.

Finding 5: World Bank Socially Related
Action Plans

World Bank socially related action plans have lim-
ited success in integrating gender as a social devel-
opment priority.

Turning to the specific challenges presented by
the recent consolidation of the World Bank’s
social development agenda, the review exam-
ined the different development action plans.
The Bank embarked on a process of addressing
social development in 1995 by mandating the
regions to prepare and implement participation
action plans (PAPs). The institution was seek-
ing “opportunities to support government ef-
forts to promote a more enabling environment
for participatory development within client
countries” (World Bank 1994b).

Assessment of PAPs from a gender perspec-
tive shows that, with the exception of Middle
East and North Africa (MENA) and East Asia,
the plans do not incorporate gender as a di-
mension or component of participation. Both
the MENA and East Asia PAPs mention women
as a marginal or “voiceless” group that, as stake-
Box 2.4 Current GAD rationales in selected international agencies

Organisation of Economic Co-Operation and Development (OECD)/Development Action Committee (DAC) Gender Actions Framework
"To uphold human rights and to achieve sustainable, people-centered development, equality in the roles and treatment of men and women is essential. Adopting gender equality...is viewed as a central issue for society." (UN 1995)

Swedish International Development Agency (Sida)
"Gender equality is a development goal in itself. The focus on gender equality makes visible the interdependence of the spheres of production and reproduction, between paid and unpaid work, and provides a basis for the formulation of strategies in support of equitable human development...Gender equality is one of the four strategic foundations in Sida, alongside poverty elimination, democratic development, human rights, and sustainable development." (Sida 1995, 7)

Overseas Development Administration (ODA), United Kingdom
"The reduction of gender inequality is not only a goal in its own right, but also a significant contribution towards sustainable development. ODA aims to tackle disparities between men and women throughout society...This also means supporting women’s efforts to achieve partnership in political and economic decisionmaking, to exercise their human rights." (ODA 1996, 3)

Canadian International Development Agency (CIDA)
"CIDA is committed to ensuring that its development activities benefit women as well as men...Investing in women leads to lasting economic growth, improved family welfare, a reduction in poverty, and a more equitable distribution of the socioeconomic benefits of development." (CIDA 1995, 4)

The Netherlands Ministry for Foreign Affairs
"The concept of autonomy, which refers to authority, freedom, and opportunity for each individual, should be understood in the framework of combating poverty and inequality on the grounds of class, gender, and race...Development cooperation based on the principle of autonomy for women means endorsing a vision of the distribution of power in all its manifestations." (Netherlands, Ministry for Foreign Affairs 1992, 14-15)

United Nations Development Programme (UNDP)
"The human development paradigm, which puts people at the center of its concerns, must be fully engendered. Equality of rights between women and men must be enshrined as a fundamental principle. Legal, economic, political, or cultural barriers that prevent the exercise of equal rights should be identified and removed.... The engendered development model...should not predetermine how different societies exercise these choices. What is important is that equal opportunities to make a choice exist for both men and women." (UNDP 1995)

United Nations Children’s Fund (UNICEF)
"UNICEF is accelerating its advocacy for universal ratification of the Convention on the Rights of the Child (CRC), a task almost accomplished, and the Convention on the Elimination of all Forms of Discrimination Against Women (CEDAW). In its work with countries to promote implementation of the conventions, UNICEF places priority [on] supporting a gender-sensitive ‘rights’ approach to programs for children and women.” (UNICEF 1995)

holders, needs to be included to mainstream participatory approaches (see box 2.5). The East Asia PAP goes further by focusing on gender as a key area of emphasis for the region.

Social Development and Results on the Ground (World Bank 1996h), the report of the Task Group set up to consolidate the Bank’s social development agenda, points to the critical importance of social development in the following terms:

The development paradigm has evolved...to a more people-centered approach that recognizes human and social capital as critical factors in sustainable development...Poverty reduction is now the overarching objective of our activities. Human resource development has grown from a fringe Bank activity to one of our largest sectors....But much remains to be done. In spite of economic growth, inequity and social alienation persist and are often increasing....To take account of these changes, the social dimensions of development need to be fully incorporated into the work of the Bank.
The Task Group report identified gender as one of the top intervention priorities for the following two reasons:
(1) "Women's participation in economic and social development is essential both for promoting economic efficiency and for reducing poverty." (5)
(2) "Gender is a major social factor in achieving growth and equity, therefore projects need to mainstream gender" (see appendices 2 and 4).

As part of the process of mainstreaming social development concerns, the Bank's regions were mandated to formulate social develop-

<table>
<thead>
<tr>
<th>Action plan</th>
<th>Gender included</th>
<th>Gender strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>LAC Social Development (1996f)</td>
<td>Yes</td>
<td>Gender treated as a separate priority area; not integrated. Refers to RGAP: &quot;Integrating stronger targeting, delivery, and monitoring/evaluation systems to address gender issues.&quot;</td>
</tr>
<tr>
<td>MENA Participation (1995g)</td>
<td>Yes</td>
<td>Use of participatory techniques to support the mainstreaming of stakeholder involvement in its development work. Women treated as a separate &quot;underrepresented or marginalized&quot; group.</td>
</tr>
<tr>
<td>ECA Social Development (1996e)</td>
<td>Yes</td>
<td>Refers to RGAP integrating gender in labor market, health, land and capital assets, ethnicity, and (where relevant) conflict. Local capacity building. Prepared several gender issue papers.</td>
</tr>
<tr>
<td>AFRICA Participation (1995b)</td>
<td>No</td>
<td>n.a.</td>
</tr>
<tr>
<td>AFRICA Social Development (1996a)</td>
<td>Yes</td>
<td>Strategic gender initiatives; gender analysis, and planning integral to participatory CAS and projects with social assessments: women in context of &quot;specific social groups.&quot; Refers to RGAP.</td>
</tr>
<tr>
<td>SAS Social Development (1996i)</td>
<td>Yes</td>
<td>Gender treated as integral part of social development (mainstreamed). Gender is key area of emphasis. Gender and participation action plans complement the social development action plan.</td>
</tr>
<tr>
<td>EAP Participation (1995c)</td>
<td>Yes</td>
<td>Mainstream participatory approaches to encompass primary stakeholders and &quot;voiceless&quot; groups. Key emphasis in social screening data sheet is gender.</td>
</tr>
<tr>
<td>EAP Social Development 1996c)</td>
<td>Yes</td>
<td>Gender treated as integral part of social development: &quot;To provide people-centered development;&quot; gender, participation, and social development action plans are complementary.</td>
</tr>
<tr>
<td>ESD Participation (1995)</td>
<td>Yes</td>
<td>Gender is not mentioned in main document, only referred to in the section on Urban Water and Sanitation: community men and women (7); gender tool kit (9)</td>
</tr>
</tbody>
</table>
ment action plans. Most regions that have produced such plans have integrated gender. However, there is great variation between regions in terms of the depth and approaches taken. For example, Latin America and the Caribbean treats gender as a separate social development priority area to be addressed by LAC's regional gender action plan, while the South and East Asia development action plans have mainstreamed gender into all of their social development strategies.

The most visible conclusion of the review of all regional participation, social development, and gender action plans produced so far is that they are essentially free-standing documents.

With the exception of the Africa Region, which has folded the PAP and the gender action plan into a single comprehensive social development action plan, there is no systematic coordination between the different plans. The extent to which coordination will occur in practice depends on the institutional structures and operational procedures developed for mainstreaming such concerns (see box 2.5).

Note
1. The triple burden comprises productive, reproductive, and community management responsibilities (Moser 1993).
Overall, this review points to the need for a Bankwide rationale and framework that sets out the fundamental reasons for mainstreaming gender and development into operational practice. This necessarily includes agreement on a common language—rather than the current situation in which, for instance, the terms gender and women are often used interchangeably. Finally, linked to both the common rationale and language, is the need for consensus on an underlying broad policy approach, or approaches, within which differences in regional emphasis can be accommodated.

Answers to such complex issues go well beyond the scope of this review. Nevertheless, the following section provides some very rudimentary ideas as to how this might be accomplished.

**Recommendation 1: Define a Rationale and Framework for Gender and Development**

As a recent “state of the art” review (Pfannenschmidt and McKay 1997) stated, three main theoretical frameworks for integrating gender issues into development work tend to underpin all subsequent writing on the topic. The authors summarize these as follows:

- The Harvard Framework, the first developed, underscores the importance of examining, among other things, who does what, who owns what, and who controls what within a community. (Overholt and others 1985)
- The Moser Methodology breaks gender-specific needs into practical needs and strategic interests, thereby providing a means of determining whether gender-specific needs will have only a practical benefit or will have a strategic, equity-enhancing impact. The methodology further defines the concept of women’s triple role in relation to men’s dual role (Moser 1993). (See box 3.1.)
- The Longwe Framework outlines a conceptual continuum of women’s empowerment. (Longwe 1994)

The critical point is that the three frameworks build upon, and complement, one another. Therefore, most development organizations work with a combination of the key concepts from the three frameworks, rather than any one alone.

Consultations with task managers and the Gender and Social Development Thematic Team on early drafts of this review generated an institution-wide debate on the need to identify a common rationale. Two approaches, “economic efficiency” and “equality,” were identified as those most commonly used within the World Bank.

1. **Economic efficiency.** The focus is on gender differences; the key objective is the achievement
Box 3.1 Defining a rationale and framework for GAD: The "Moser Methodology" of gender planning

- The goal of gender planning is the emancipation of women from their subordination, and their achievement of equality, equity, and empowerment.
- The knowledge base explored in recent feminist and WID/GAD development debates provides the conceptual rationale for several key analytical principles, relating to gender roles and practical and strategic gender needs, as well as to control over resources and decision-making in the household, civil society, and the state (that is, the recognition that because men and women have different positions within the household and different degrees of access to and control over resources, they not only play different and changing roles in society, but they also have different needs).
- These principles, in turn, translate into tools and techniques for a gender-planning process.
- These tools demonstrate how the five different WID/GAD policy approaches (welfare, antipoverty, equity, efficiency, and empowerment) recognize different roles, meet different needs, and rely on varying participatory planning processes.
- Gender planning is operationalized through a diversity of procedures at the policy, program, and project levels.
- Equally, gender planning is mainstreamed into existing institutions, rather than establishing separate gender-specific organizational structures.


of economic growth. Differences can be based on:
- Sex/gender (social relations)
- Roles (reproductive/productive/community)
- Gender division of labor/resources
- Practical gender needs/activities.
This approach does not implicitly assume that gender inequality is an issue; therefore, it is not seen as confrontational.

2. Equality. The focus is on gender disparities; the key objective is to reduce gender-based inequality and thus to achieve greater inclusion and social justice. Disparities can be based on:
- Access to and control over resources and power
- Strategic needs/interests/activities
- Social institutions where constraints in access, power, or participation occur.
Ultimately an approach that combines efficiency and equality as the necessary basis for sustainable development may be the most appropriate rationale for the World Bank.

Recommendation 2: Ensure Consensus in Gender Analysis

Gender analysis is based on the institutional rationale for gender and development. The components of a gender analysis therefore depend on the institution’s approach to gender issues. In order to assist task managers, who may wish to undertake a gender analysis in a wide variety of sectors and at different stages of project cycles, consensus as to both the definition and the components of a gender analysis may be the most important mechanism for Bankwide collaboration on gender issues.

As illustrated in box 3.2, there is currently no consistent definition of what constitutes a gender analysis within the World Bank (or outside it). Although some similarities of language exist (such as roles, needs, activities, and opportunities), the difference in definitions—between PREM’s World Bank Gender Net and their Guidelines for Gender Analysis in the CAS, for example—may confuse, rather than clarify, issues for task managers.

Building on the distinction between the efficiency and equality approaches identified above, a working definition of gender analysis that is inclusive of both might be worded as follows:

Gender analysis consists of the techniques and approaches intended to bring to light two sets of issues, within a specific context:
- Gender-based differences and disparities in roles, constraints, needs, and opportunities. The extent to which these differences
# Box 3.2 Diversity in current definitions of gender analysis

<table>
<thead>
<tr>
<th>Source</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minh Chau-Nguyen, &quot;Gender Analysis in the CAS Process,&quot; Poverty Reduction and Economic Management Network, 1997.</td>
<td>&quot;Gender analysis looks at quantitative and qualitative data on the different roles, activities, needs, and opportunities of men and women in economic as well as non-economic activities in a particular setting to determine how they differ, and how they affect and, in turn, are affected by interventions and policies.&quot; (p.1)</td>
</tr>
<tr>
<td>Poverty Reduction and Economic Management Network, &quot;World Bank Gender Net,&quot; 1997d.</td>
<td>&quot;Gender analysis examines the access and control men and women have over resources. This includes analyzing the sexual division of labor and the outputs (benefits) of their labor. It also refers to a systematic way of determining men’s and women’s often differing development needs and preferences and the different impacts of development on women and men. Gender analysis takes into account how factors of class, race, ethnicity, or other factors interact with gender to produce discriminatory results.&quot;</td>
</tr>
<tr>
<td>Dayal and others, &quot;Gender Analysis and Planning in the Bank Project Cycle,&quot; 1993.</td>
<td>&quot;Gender analysis captures men’s and women’s different opportunities, constraints and responsibilities, and access to and control over resources.&quot;</td>
</tr>
<tr>
<td>SEGA, &quot;Socioeconomic and Gender Analysis Programme,&quot; 1996.</td>
<td>&quot;Gender analysis: the study of the different roles of women and men to understand what they do, what resources they have and what their needs, responsibilities, and priorities are.&quot;</td>
</tr>
<tr>
<td>U.N., <em>Women 2000</em>, 1992.</td>
<td>&quot;The systematic effort to document and understand the roles of men and women within a given context. Key issues include (a) the division of labour for both productive and reproductive activities; (b) access to and control over resources and benefits; and (c) social, economic and environmental factors that influence both of the above.&quot;</td>
</tr>
<tr>
<td>Pfannenschmidt and McKay, &quot;Through a Gender Lens: Resources for Population, Health, and Nutrition Projects,&quot; USAID, 1997.</td>
<td>&quot;Gender analysis is the systematic study of the differences in condition (material welfare) and position (status) of women versus men in a given population. Gender analysis provides important contextual information that can be used as a community-based needs assessment to plan projects or to evaluate their progress or impact.&quot;</td>
</tr>
<tr>
<td>Hartigan, &quot;Gender, Environment, and Health: Incorporating a Gender Approach in Environmental Health Work,&quot; PAHO, 1997.</td>
<td>&quot;Gender analysis is an approach which has its purpose to identify analyze and act upon inequities that arise from belonging to one sex or another....fundamental to applying an analysis of a health situation from a gender perspective is the consideration of access and control of resources necessary to protect health.&quot;</td>
</tr>
</tbody>
</table>
and disparities are significant for the accomplishment of specific policy, sector, or program objectives.

Recommendation 3: Agree on Common Concepts and Language

Agreement on common concepts and language follows directly from the rationale and definition of tools and techniques—in this case gender analysis. Box 1.1 contained basic definitions of the most common gender and development concepts, including “sex and gender,” “gender relations,” “gender roles,” and “WID and GAD.” Based on the proposed working definition of gender analysis, further systematic clarification is required for such well-known concepts as “gender roles” and “gender division of labor/resources,” as well as the definition of “gender needs/interests/approaches.” Some potential definitions are elaborated in box 3.3; they are not definitive and, as with all definitions, they can be crafted to fit institutional requirements.

Recommendation 4: Define the Components of a Gender Analysis

Gender analysis is the most critical tool to ensure that gender concerns are mainstreamed into the early stages of all World Bank operations. This includes not only projects, but also economic and sector work (ESW) and country assistance strategies (CASs).

Providing guidelines to task managers concerning the different components of a gender analysis will ensure consistency in coverage across the institution. This becomes much easier once a common rationale and language have been agreed upon. Obviously, a single checklist solution fails to address all concerns; however, a recommendation for gender analysis would include the following components:

Box 3.3 Definitions: Gender roles, needs, interests, and approaches

Gender roles define what a society considers to be appropriate for a man or a woman, reflecting a division of labor. Both women and men play multiple roles in society; while men play their multiple roles sequentially, women play their roles simultaneously, and must balance competing claims on limited time for fulfillment of each.

- **Productive role.** Work done both by women and men for pay in cash or kind; includes both market production with an exchange value and subsistence/home production with actual use value, but also potential exchange value.
- **Reproductive role.** Child bearing/rearing responsibilities and domestic tasks required to guarantee the maintenance and reproduction of the labor force; includes not only biological reproduction but also the care and the maintenance of people living in the household.
- **Community roles.** Voluntary activities contributing to the welfare, development, or political organization of the community.

Because men and women have different gender roles they also have different gender needs/interests/approaches. From both a policy and operational view-point, it is useful to distinguish between two types of gender needs:

- **Practical gender needs** are needs women and men identify in their socially accepted roles in society. They are practical in nature, often concern inadequacies in living conditions (such as water provision, health care, employment), and respond to immediate needs identified within a specific context. While such needs arise out of gender divisions of labor, meeting them does not change the position of either women or men in society.

- **Strategic gender needs** are those needs formulated from the socially structured subordinate position of women to men in society. Such biases vary according to particular contexts and may include gender-based discrimination in the division of labor and in household management; factor and product markets (including access to and control over productive resources); legal status and rights; and participation in decisionmaking at the household, community, or national level. Meeting such needs through policies to improve women’s status and promote equity entails actions to remove systematic biases against women, thereby changing women’s position in society.

### Box 3.4 Potential components of a gender analysis

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
</table>
| Needs assessment                 | • What are the priority needs of men and women?  
• What are the underlying causes of the problem?  
• How can these problems be addressed?  
• Which problems can be solved at the local level?  
• Which need external intervention? |
| Activities profile               | • Who does what?  
• What do women, men, and children do?  
• When do they do it—daily? seasonally?  
• Where is the activity performed?  
• How flexible or rigid is the division of labor? |
| Resources, access, and control profile | • What resources are available to men and women to conduct their activities?  
• What resources (land, produce, knowledge, cash, tools, institutions) do women and men have access to (use)?  
• Which resources do they control, who has power to decide whether a resource is used, how it is used, and how it is allocated? |
| Benefits and incentives analysis | • Benefit analysis refers to resources, access, and control, and goes further to analyze who controls outputs or benefits.  
• Incentive analysis taps into user preferences, values placed on output, and the risks involved, which affect motivation.  
• Incentives include: taste, risk, convenience, time savings, reduced conflict, marketability, prestige, and byproducts. |
| Institutional analysis           | • Gender analysis of social institutions.                                                                                                   |
| (a) Intrahousehold dynamics      | • The household is a system of resource allocation.  
• All members of a household have different roles, skills, interests, needs, priorities, access to, and control over resources.  
• Any development intervention that affects one member of the household will positively or negatively affect all others.  
• It is important to understand these interdependent relationships—the rights, responsibilities, obligations, and patterns of interaction among household members. |
| (b) Interhousehold relations      | • Individuals and households belong to larger groupings (such as professional or religious groups or extended families).  
• With these they are involved in labor exchanges, flows of goods, and other alliances for survival.  
• It is important to understand the social organization of these larger networks and the gender differences in roles, functions, and access. |
| Institutional constraints and opportunities | • Policies, laws, regulations, and procedures from the national agency level to the community level.  
• Agency organization, responsiveness, activities, training, gender, mobility, and skills of personnel.  
• Planning and evaluation procedures.  
• Information flow and outreach activities. |

**Sources:** CEDPA (1996); Kabeer (1994); Derbyshire (1996); Moser (1989, 1993); Overholt (1985).
Mainstreaming Gender and Development in the World Bank

- Needs assessment
- Activities profile
- Resources, access, and control profile
- Social institutional analysis
- Benefits and incentives analysis
- Institutional constraints and opportunities analysis.

A gender analysis comprising these components provides the necessary framework for identifying gender-based differences and disparities in roles, constraints, needs, and opportunities. It implies the need to understand access to and control over resources and power, as well as social institutions in which constraints to access, power, or participation occur (see box 3.4). The extent to which these differences and disparities are significant for the accomplishment of specific policy, sector, or program objectives can then be analyzed from the results of the different components identified above.¹

**Recommendation 5: Apply Gender Analysis in other Networks**

Once the components of a gender analysis are clarified, they can be introduced, or mainstreamed, into many operational procedures—not only social assessments and CASs, but also a diversity of additional tools and techniques across all four World Bank networks. This could include procedures such as poverty assessments in the Poverty Reduction and Economic Management Network (PREM) and environmental assessments in ESSD, as well as other procedures in the Human Development (HD) and Finance, Private Sector, and Infrastructure (FIPSI) networks.

**Concluding Comment**

These very provisional recommendations concerning future steps toward mainstreaming gender into World Bank operations are not intended to be either definitive or conclusive. Their purpose is more to illustrate the types of guidelines that could facilitate a more consistent approach to mainstreaming gender at the policy, program, and project level across the Bank, while respecting regional, sector, or other types of variations.

**Note**

1. An alternative, simplified version of the above, identified as a “gender diagnosis,” was recently developed by the Pan American Health Organization for an excellent new training manual (PAHO 1997) using a similar rationale and language, and is illustrated in appendix 5.
APPENDIX 1

World Bank Gender Policy and Beijing Documents

1.1 World Bank Gender Policy Documents

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale</th>
<th>Key concepts</th>
<th>Intervention/procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhancing Women's Participation in Development</td>
<td>World Bank Policy Paper (1994)</td>
<td>&quot;Investing in women is critical for poverty reduction. Speeds economic development by raising productivity and promoting more efficient use of resources...produces significant social returns.&quot; (22)</td>
<td>(D) Gender: differentiation, gaps, analysis, roles/needs, disparity; (A/C) Gender differences in access/control resources; barriers</td>
<td>Institutional interventions as in OP</td>
<td>Efficiency Anti-poverty Equity</td>
</tr>
<tr>
<td>&quot;The Gender Dimension of Development&quot;</td>
<td>World Bank Operational Policy (1994)</td>
<td>&quot;To reduce gender disparities and enhance women's participation in economic development.&quot;</td>
<td>(D) Gender disparities; gender analysis; (A/C) barriers; access to assets and services</td>
<td>1. Design gender-sensitive policies 2. Train in gender analysis 3. Obtain financing and collaboration with other agencies 4. Analyze gender issues through poverty assessments and incorporate into CASs</td>
<td>Efficiency Equity</td>
</tr>
</tbody>
</table>

a. Numbers in parentheses refer to pages in cited text.
b. (D): differentiation; (A/C): access/control; (L): level of institution.
### 1.2 World Bank Beijing Documents

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale</th>
<th>Key concepts</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Toward Gender Equality: The Role of Public Policy</em></td>
<td>Development in Practice series (1995)</td>
<td>“Persistent inequality between women and men constrains a society’s productivity and, ultimately, slows its rate of economic growth.” (vii)</td>
<td>(D) Gender in/equality (1); gap (9); differences (15); equalize opportunities between men and women; wage disparity (3); women agents of change</td>
<td>Governments to improve economic status of women by:</td>
<td>Equity</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(A/C) Constraints on women’s opportunities (employment) (4); intra-household decisionmaking process (1); intra-household allocation of resources (1); collective vs. unitary household model (22)</td>
<td>• Modifying legal framework</td>
<td>Efficiency</td>
</tr>
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<td></td>
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<td>Equality</td>
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<tr>
<td></td>
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<td></td>
<td>(L) Household; market; institutional norms (1)</td>
<td></td>
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</tr>
<tr>
<td><em>Advancing Gender Equality: From Concept to Action</em></td>
<td>World Bank (1995)</td>
<td>(D) Variations in gender relations (4); gender: issues, inequality, -specific constraints, -neutral, -based labor market segmentation (23), discrimination (7); women’s time (7); women’s participation (9); segregation of women (23); culturally based gender stereotypes (27)</td>
<td>(A/C) Barriers for women (5); gender-based constraints; women’s access to financial services (6); inside/outside (4)</td>
<td>• Modifying legal framework</td>
<td>Efficiency</td>
</tr>
<tr>
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<td>Equity</td>
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</tbody>
</table>

a. Numbers in parentheses refer to pages in cited text.
b. (D): differentiation; (A/C): access/control; (L): level of institution.
## Appendix 2

### World Bank OED Documents, Country Studies, and Strategies

#### 2.1 World Bank OED Documents

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale</th>
<th>Key concepts&lt;sup&gt;a,b&lt;/sup&gt;</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender Issues in World Bank Lending</td>
<td>1995</td>
<td>&quot;Gender differences are at the core of human resource development. They are relevant for alleviating poverty... Understanding the responsibilities and roles of women and men among various income and ethnic groups will help borrowers plan and implement effective development strategies... Attention to gender issues is essential to achieve the Bank's mandate of poverty alleviation and economic growth.&quot; (22)</td>
<td>(D) Gender: roles, differences, differentiated outcomes (80), triple role (3,22,23) (A/C) Constraints (23,58) (L) Household/community Gender-related action/activities (1), gender: issues (2), -related issues (79), -related problem (81), -related objectives (3), experience, focus (23), assessment, work; WID-focus (23)</td>
<td>(a) Country involvement and commitment to gender-related actions (b) Clear integration of gender-related objectives with overall project objectives (c) Gender issues to be addressed in ESW and CASs (d) Presence of staff with gender experience (e) Supervision/attention to gender action</td>
<td>Efficiency Equity Anti-poverty</td>
</tr>
<tr>
<td>Mainstreaming Gender in World Bank Lending: An Update</td>
<td>1997</td>
<td>&quot;World Bank involvement in gender issues on the basis of improved efficiency, poverty alleviation, and equity.&quot; (2) The arguments most frequently used to justify gender-related activities were: (a) equity, (b) poverty; (c) welfare, and (d) economic efficiency (16).</td>
<td>(D) High quality/substantial gender analysis (1,10,14) Differential benefits for men and women (box 23, 12) Gender gap (26/27) (A/C) Intrahousehold decision processes (30) Gender issues, action, goals, -related actions/activities, roles, objectives, supervision, components, aspects, outcome</td>
<td>(a) Gender concerns should be fully addressed in social assessments (b) Integration with other World Bank concerns (c) Breakdown of key indicators by gender (d) Set clear targets</td>
<td>Efficiency Equity Anti-poverty Welfare</td>
</tr>
</tbody>
</table>

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<sup>a</sup> Numbers in parentheses refer to pages in cited text.

<sup>b</sup> (D): differentiation; (A/C): access/control; (L): level of institution.
### 2.2 World Bank Country Studies

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationalea</th>
<th>Key conceptsâ,â</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender and Poverty in India</td>
<td>1991</td>
<td>&quot;If the objective is to change current patterns (as one key means of increasing women's productivity, reducing their dependency, and ultimately changing the prevailing gender ideology), then...&quot; (5) &quot;increasing women's economic productivity is a necessity to achieve key development goals.&quot;</td>
<td>(D) Inside/outside dichotomy; map of inside/outside dichotomy</td>
<td>Increase women's access to key inputs, such as:</td>
<td>Efficiency</td>
</tr>
</tbody>
</table>
| | | | (A/C) Access to key inputs (education, credit); control (over resources) | • Education  
• Training  
• Credit  
• Land | Empowerment |
| | | (L) Household as collective; site of intrahousehold, gender-based power variations and motivations | | | |
| | | (6) Welfare inputs; productive outputs | | | |
| Women in Pakistan: An Economic and Social Strategy | 1989 | "Development is held back—and the gains of growth are not widely shared—if half the population cannot participate effectively either as contributors or as beneficiaries. Increasing opportunities for women will be essential to improve economic performance, promote equity, and slow Pakistan's rapid population growth." (iii) | Invisible labor (xx); status of women; disadvantaged (xiii); discrimination (xxvii) | (a) Investing in human resources (education and health)  
(b) Improving economic productivity  
(c) Removing overt discrimination | Efficiency  
Welfare |
| | | (D) Purdah; inside/outside (xxi,xxii) class (xxii) | (A/C) Access/constraints to inputs and services (xxiv, xxv) | | |
| Bangladesh: Strategies for Enhancing the Role of Women in Economic Development | 1990 | "Bangladesh could benefit significantly in terms of increased productivity, enhanced family welfare (particularly amongst the poor), and reduced population growth by focusing on the development potential of its women." (xviii, 2)  
"In themselves, these extremely adverse conditions justify major efforts to mitigate Bangladeshi women's suffering..." (xxix) | (D) Inside/outside (xvii); invisible labour (xviii, 2) | (a) Removal of gender-specific constraints  
(b) Investment in women: education, health, access to productive resources such as credit  
(c) Participation by women | Efficiency  
Equity |
| | | | (A/C) Access to inputs; gender-specific constraints of culture and tradition (xvii, xviii, 1) | | |
| | | | (L) Household; Economy (xvii) | | |

(Table continues on the following page.)
<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale</th>
<th>Key concepts&lt;sup&gt;a,b&lt;/sup&gt;</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kenya: The Role of Women in Economic Development</td>
<td>1989</td>
<td>&quot;[Kenya's]...experience shows that integration of women in development is a cost-effective way to pursue economic progress for the whole population.&quot; (xi)</td>
<td>(D) Families...headed de facto by women; women-headed households; female heads of household (xix-xx); women's groups; women farmers (1); division of agricultural labour by gender (6); &quot;women's crops&quot; (28) (A/C) Female head of household (x); lack of access to credit (29) (L) Household</td>
<td>(a) Intensification of the agricultural extension program (b) Improvement of secondary education for girls (c) Expansion of &quot;safe motherhood&quot; (d) Exploration of options in credit (e) Expansion of rural water supplies (f) Potential for women's employment outside agriculture</td>
<td>Efficiency</td>
</tr>
<tr>
<td>Turkey: Women in Development</td>
<td>1993</td>
<td>&quot;...to enhance the participation of women in the economic development process&quot; (xii) &quot;Turkey can benefit significantly in terms of increased productivity, enhanced family welfare, and reduced population growth by focusing more on the development potential of its women.&quot; (xi)</td>
<td>(D) Limited economic opportunities (xii); women's subordinate positions in economy and household (xiii); gender-segregated labor market (xiv), employment status, disparity (xx), gap (xii), neutral policies (xxii); female labor participation (xii) (A/C) Women's access to services (xxii); barriers (L) Male-dominated institutions; household vs. labor market</td>
<td>(a) Remove barriers for women's participation (b) Education/schooling; broadening women's skill range (c) Eliminate gender segregation in employment equity initiatives (d) Eliminate segregation of boys/girls separate schools and corresponding bureaucratic structures in Ministry of Education (e) Integrate women into activities in all ministries</td>
<td>Efficiency</td>
</tr>
</tbody>
</table>

<sup>a</sup> Numbers in parentheses refer to pages in cited text.
<sup>b</sup> (D): differentiation; (A/C): access/control; (L): level of institution.
### 2.3 World Bank Country Strategies

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Key Concepts&lt;sup&gt;a,b&lt;/sup&gt;</th>
<th>Intervention/ procedures&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>El Salvador, Moving to a Gender Approach: Issues and Recommendations</strong></td>
<td>1996</td>
<td>&quot;...identifies and discusses gender differences and inequities that affect women's and men's contributions to El Salvador's economic and human development.&quot; (ix) &quot;Gender differences have important economic and human development implications. Differences and inequities in health status; educational attainment, access to land tenure and affordable credit affect human well-being, economic productivity and rates of investment.&quot; (xii)</td>
<td>(D) Gender: differences, -based behavioral differences, inequities, disaggregated data, stereotypes, approach; discriminatory practices (ix); inequities that affect women's and men's contribution to economic and human development; societal based gender-roles (47); gender-based labor trends and inequities; gender-related participation indicators (xi)</td>
<td>Three strategic goals (ix): (1) Eliminating gender perceptions in society that inadvertently lead to discrimination and biases (2) Supporting men's and women's behavioral tendencies that reduce inequitable access to income opportunities and resources (3) Creating a more gender equitable division of labor in the household</td>
<td>GAD</td>
</tr>
<tr>
<td><strong>Towards a Gender Strategy for Nigeria: Integrating Women's Issues into the Development Agenda</strong></td>
<td>1992</td>
<td>&quot;The major objective of the Bank in Nigeria is to support the government efforts to alleviate poverty and raise the standard of living in a sustainable manner... In this context, the understanding and full development of both productive and reproductive roles of women are critical to bring about economic success in the country.&quot; (iii)</td>
<td>(D) Gender relations (1); roles; multiple roles (5); productive/reproductive roles (iii); division of labor; gender-disaggregated data; inequities (1); triple burden (1)</td>
<td>(A/C) Barriers: formal/ informal/ legal/ institutional to: access to factors (education, credit, property) (iii); gender-specific constraints to &quot;human capital&quot; and &quot;economic productivity&quot; (iv); intra-household decisionmaking</td>
<td>Efficiency</td>
</tr>
</tbody>
</table>

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<sup>a</sup> Numbers in parentheses refer to pages in cited text.

<sup>b</sup> (D): differentiation; (A/C): access/control; (L): level of institution.
## World Bank Regional Action Plans

### 3.1 World Bank Regional Gender Action Plans

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale</th>
<th>Key concepts</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Capacity Building on Gender in Latin America&quot;</td>
<td>1997</td>
<td>&quot;This proposal sets out a program to promote gender-responsive development in Latin America and the Caribbean (LAC); that is, development that considers gender differences and constraints and works towards reducing gender barriers.&quot; (1)</td>
<td>(D) Gender: differences, issues, inequities, -based investments, goals, -disaggregated information&lt;br&gt;(A/C) Gender: barriers, constraints, intrahousehold resource allocation&lt;br&gt;(L) Household, institutions</td>
<td>(a) In-country workshops to create consensus on gender issues and priorities, with the participation of government, nonprofit, and private stakeholders&lt;br&gt;(b) A gender operations support facility in LAC&lt;br&gt;(c) A gender review and monitoring system&lt;br&gt;(d) Special studies and strategic events on priority areas for gender equity</td>
<td>Equity</td>
</tr>
<tr>
<td>&quot;MENA Region Gender Action Plan&quot;</td>
<td>1996</td>
<td>&quot;MENA gender indicators are amongst the worst in the world. This is true for social indicators, participation of women in the economy, political and legal rights, and in terms of institutional concern with gender issues. However, MENA governments, with rare exceptions, have been reluctant or at best timid in addressing issues of gender equality, and thus, while there has been some progress on gender equality over the last decades, it has been limited.&quot; (1)</td>
<td>(D) Gender: equality, equity, disparities, impact, -related activity, analysis, issue, indicators; women's participation in the economy; gender-disaggregated data&lt;br&gt;(A/C) Political and legal rights and participation; advocacy; constraints on and niches for participation and access to services and productive resources (4). Intrahousehold distribution of resources&lt;br&gt;(L) Household, institutions, economy</td>
<td>(a) Improved gathering and analysis of gender-disaggregated data&lt;br&gt;(b) Highlighting of gender issues in selected CASs, economic reports and overall country policy dialogue&lt;br&gt;(c) Continuing attention to issues of women's participation in the economy (d) Support to all local women's groups, government and nongovernmental</td>
<td>Efficiency</td>
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</table>

(Table continues on the following page.)
### 3.1 World Bank Regional Gender Action Plans (continued)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale</th>
<th>Key concepts</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;South Asia Region Gender Action Plan&quot;</td>
<td>1997</td>
<td>&quot;In some countries—particularly in South Asia—gender-based disparities are sharp and represent a major constraint on economic growth and poverty reduction that must be addressed as a top priority...In other countries gender asymmetries, while present, are more subtle...A well thought out and consistent gender strategy is no less important in such a country; significant welfare and efficiency gains are possible from reducing inequities in access to resources and opportunities even when they are less acute.&quot; (1)</td>
<td>(D) Invisibility of working women; subordination (i); Gender: analysis, relations, ideology; stratification, relations, issues, disparities, -based differentials, equity (1,3,7); inside/outside (female/male) dichotomy (3)</td>
<td>&quot;...The strategy that is common to all countries in the region is the emphasis on strengthening women's productive roles, while providing the support for doing so through improvements in health and education. Further, improving the economic well-being of the region's poor women must include not only expanding opportunities of employment and earnings, but making specific efforts to enable women to avail of the opportunities.&quot; (i,ii)</td>
<td>Efficiency, Equity, Anti-poverty</td>
</tr>
<tr>
<td>&quot;Europe and Central Asia Gender Action Plan&quot;</td>
<td>1997</td>
<td>&quot;Selectivity in terms of focusing on gender issues that have potentially large pay-offs in terms of efficiency and welfare gains.&quot; (1)</td>
<td>(D) Gender roles; asymmetric gender outcomes; gender distortions; gender issues</td>
<td>(a) CAS as entry point (PA, SA, gender-specific analysis) (b) Research and monitor specific areas: institutionalization of gender issues in ECA; regional gender coordinator; gender group; country managers; resident mission focal points (c) Tools: Regional good practice dissemination; training in gender issues</td>
<td>Efficiency, Equity</td>
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### 3.1 World Bank Regional Gender Action Plans (continued)

<table>
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<tr>
<th>Publication</th>
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<tbody>
<tr>
<td>&quot;Africa Regional Gender Action Plan (RGAP)&quot;</td>
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<thead>
<tr>
<th>Date</th>
<th>Goals/rationale&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Key concepts&lt;sup&gt;b&lt;/sup&gt;</th>
<th>Intervention/procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>Overall regional goal: <strong>Sustainable Poverty Reduction</strong>: &quot;By identifying gender differentials in economic capacity as a key strategic issue for Africa, the RGAP reflects the centrality of gender in Africa's economic development.&quot; (1) &quot;...gender-based discrimination limits economic growth. This discrimination markedly affects macroeconomic efficiency and equity.&quot; (3)</td>
<td>(D) Women's economic capacity (1); Gender; differentials (4); bias (2); dimension (of poverty) (2); barriers (4); disparity (4); female poverty (6); women's labor time; Triple responsibility (9); systematic participation of women at all levels (8)</td>
<td>(a) Endorsement of RGAP by regional vice presidents</td>
<td>Efficiency</td>
</tr>
<tr>
<td></td>
<td>(A/C) Inheritance and property rights...strongly asymmetrical by gender (4); inequality in intra-household resource allocation; women's education, health (6)</td>
<td>(A/C) Gender-based constraints; inequities in access (to resources and opportunities); intrahousehold allocation of resources</td>
<td>(b) Accountability to WB president</td>
<td>Equity</td>
</tr>
<tr>
<td></td>
<td>(L) Household; labor market; policy</td>
<td>(L) Household; labor market; economy; society</td>
<td>(c) Responsiveness to commitments made in SPA of integrating poverty and gender systematically into policy dialogue, economic reform operations, and strategic documents</td>
<td>Anti-poverty</td>
</tr>
<tr>
<td></td>
<td>CAS to identify three priority gender actions.</td>
<td></td>
<td>(d) Country directors/teams responsible for specifying strategic gender actions for each country (gender analysis needs to be part of SA and participation in CAS)</td>
<td>GAD</td>
</tr>
<tr>
<td></td>
<td>&quot;In some countries...gender-based disparities are sharp and represent a major constraint on economic growth and poverty reduction that must be addressed as a top priority...In other countries gender asymmetries, while present, are more subtle...A well thought out and consistent gender strategy is no less important in such a country: significant welfare and efficiency gains are possible from reducing inequities in access to resources and opportunities even when they are less acute.&quot; (1)</td>
<td>(D) Gender: disparities, stratification, -related activities, analysis, equity, -disaggregated data, strategy; wage gap</td>
<td>(a) Set of <em>country-specific actions</em> that focus on identifying the importance of gender, priority issues, and the Bank's role in addressing them in the context of each country</td>
<td>Efficiency</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(A/C) Gender-based constraints; inequities in access (to resources and opportunities); intrahousehold allocation of resources</td>
<td>(b) Set of <em>regionwide actions</em> that complement and facilitate the process of mainstreaming gender into the Bank's work and into the dialogue with its borrowers and other partners</td>
<td>Anti-poverty</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(L) Household; labor market; economy; society</td>
<td></td>
<td>Equity</td>
</tr>
</tbody>
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<sup>a</sup> Number in brackets refers to a page in cited text.

<sup>b</sup> (D): differentiation; (A/C): access/control; (L): level of institution.
### 3.2 Social Development Task Group Report

<table>
<thead>
<tr>
<th>Publication</th>
<th>Date</th>
<th>Goals/rationale^a</th>
<th>Key concepts^a</th>
<th>Intervention/ procedures^a</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Social Development and Results on the Ground&quot;</td>
<td>1996</td>
<td>&quot;The development paradigm has evolved...to a more people-centered approach that recognizes human and social capital as critical factors in sustainable development...Poverty reduction...In spite of economic growth, poverty and social alienation persist, and are often increasing.&quot;</td>
<td>Gender: Women's participation in economic and social development is essential both for promoting economic efficiency and for reducing poverty (5)</td>
<td>Gender is a major social factor in achieving growth and equity, therefore projects need to mainstream gender. (Annex 2, 4)</td>
<td>Efficiency</td>
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<tr>
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<td>Equity</td>
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</tbody>
</table>

^a Numbers in parentheses refer to pages in cited text.
## Bilateral and Multilateral Donor Policies

### 4.1 Bilateral Donor Policies

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale[^a]</th>
<th>Key concepts[^a,b]</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Women in Development: Advancing towards Autonomy</td>
<td>Netherlands Ministry of Foreign Affairs (1992)</td>
<td>&quot;The concept of autonomy, which refers to authority, freedom, and opportunity for each individual, should be understood in the framework of combating poverty and inequality on the grounds of class, gender, and race.&quot; (14,15) &quot;Development cooperation based on the principle of autonomy for women means endorsing a vision of the distribution of power in all its manifestations.&quot; (15)</td>
<td>(D) Autonomy; self-determination; human development; (gender) (1); class; race (15)</td>
<td>(a) Mainstreaming accompanied by targets and screening procedures</td>
<td>Autonomy/ Empowerment</td>
</tr>
<tr>
<td>CIDA’s Policy on Women in Development and Gender Equity, 1995</td>
<td>Canadian International Development Agency (1996)</td>
<td>&quot;CIDA is committed to ensuring that its development activities benefit women as well as men....Investing in women leads to lasting economic growth, improved family welfare, and a reduction in poverty—a more equitable distribution of the socio-economic benefits of development.&quot; (4)</td>
<td>(D) Gender: relations, equity, roles, gap, inequality, analysis (3); gender division of labor (4); systematic discrimination (6); practical needs (6)</td>
<td>(a) To encourage, respond to, and support initiatives that: increase women’s participation in decisionmaking processes; improve women’s income levels and economic conditions; improve women’s access to basic health, family planning services, and education; promote the human rights of women</td>
<td>Equity Efficiency Empowerment</td>
</tr>
</tbody>
</table>

[^a]: (A/C) Autonomy: physical, economic, political, sociocultural; distribution of power (15) (L) Household; community; society; market

[^b]: (14,15) Autonomy: physical, economic, political, sociocultural; distribution of power (15) (L) Household; community; society; market

(Table continues on the following page.)
### 4.1 Bilateral Donor Policies (continued)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Key concepts&lt;sup&gt;b&lt;/sup&gt;</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fourth World Conference on Women: Platform for Action</td>
<td>British Overseas Development Administration (1996)</td>
<td>&quot;...The reduction of gender inequality is not only a goal in its own right, but also a significant contribution towards sustainable development...ODA aims to tackle disparities between men and women throughout society...This also means supporting women's efforts to achieve partnership in political and economic decisionmaking, to exercise their human rights...&quot; (3)</td>
<td>(D) Disparities; Gender (in)equality (3) Gender issues (5) (A/C) Access to productive resources; control of assets (3) (L) Household, community, markets, all levels of government (3)</td>
<td>Support: Programs that help women and girls gain greater access to education, health, and incomes</td>
<td>Equity</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Equal partnership (3)</td>
<td>Institutional development and capacity building</td>
<td>Efficiency</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Civil society institutions concerned with promotion of gender equality</td>
<td>Empowerment</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>*Gender equality is a development goal in itself. The focus on gender equality makes visible the interdependence of the spheres of production and reproduction, between paid and unpaid work, and provides a basis for the formulation of strategies in support of equitable human development.&quot; MIFA (7) &quot;Gender equality is one of the four strategic foundations in SIDA alongside poverty elimination, democratic development and HR and sustainable development.&quot; (7)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender Equality in Development Cooperation: Taking the Next Step</td>
<td>Swedish International Development Agency (1995)</td>
<td>&quot;Gender equality is a development goal in itself. The focus on gender equality makes visible the interdependence of the spheres of production and reproduction, between paid and unpaid work, and provides a basis for the formulation of strategies in support of equitable human development.&quot;</td>
<td>(D) Gender roles (11); equality (7,8,9,11); people includes men and women on equal terms. (A/C) Increased political and economic power-sharing between men and women; the securing of human rights for both men and women. (11); gender equality a &quot;societal issue&quot; not a women's issue (15); girl child (15)</td>
<td>Support empowerment of women through special inputs targeting women</td>
<td>Gender Equality</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(b) Mainstreaming a gender perspective into existing programs in all areas, emphasis on policy development and concrete activities within programs/agenda setting</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(c) &quot;Giving attention to gender equality at highest policy level in relation to the political, economic, and legal frameworks (17)</td>
<td></td>
</tr>
</tbody>
</table>

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<sup>a</sup> Numbers in parentheses refer to pages in cited text.
<sup>b</sup> (D): differentiation; (A/C): access/control; (L): level of institution.
### 4.2 Multilateral Policies

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale</th>
<th>Key concepts&lt;sup&gt;a,b&lt;/sup&gt;</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>DAC Gender</td>
<td>DCD/DAC, (1996</td>
<td>“To uphold human rights and to</td>
<td>(D) Women's education; economic actors; managers of natural resources; men's behavior and</td>
<td>Endorsed goals for DAC-member aid agencies to:</td>
<td>Gender equality</td>
</tr>
<tr>
<td>Actions</td>
<td>draft)</td>
<td>achieve sustainable, people-centered</td>
<td>attitudes; gender: roles, differences, disparities, distortions, issues, approaches (7),</td>
<td>(a) Endorse gender equality as strategic objective</td>
<td>Human rights</td>
</tr>
<tr>
<td>Framework</td>
<td></td>
<td>development, equality in the roles and</td>
<td>knowledge, responsible, responsive, (11), entry points, training, analysis (11)</td>
<td>(b) Reemphasize sociocultural aspects of development</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>treatment of men and women is</td>
<td>(A/C) Access to economic opportunities</td>
<td>(c) Reconsider impact on women of economic cooperation, trade, enterprise development,</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>essential.”</td>
<td>• Emphasize...accountability and adequate monitoring.</td>
<td>and nonproject forms of cooperation</td>
<td></td>
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<td></td>
<td></td>
<td>(4) “Adopting gender equality...is</td>
<td>• DAC to establish a Gender Action Framework and Plan.</td>
<td>(d) Include gender implication in analyses, policies, country, and sector strategies</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>viewed as a central issue for society.”</td>
<td></td>
<td>(e) Emphasize principles in areas such as conflict resolution, HR, good governance, participation</td>
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<td></td>
<td></td>
<td>(6)</td>
<td></td>
<td>(f) Help partners to strengthen institutional capacity for addressing gender equality</td>
<td></td>
</tr>
</tbody>
</table>

* (Table continues on the following page.)
4.2 Multilateral Policies (continued)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Level/date</th>
<th>Goals/rationale a</th>
<th>Key concepts b</th>
<th>Intervention/ procedures</th>
<th>Stated policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fourth World Conference on Women: Platform for Action</td>
<td>UN (1995)</td>
<td>&quot;Equality between women and men is a matter of human rights and a condition for social justice and is also a necessary and fundamental prerequisite for equality, development and peace. A transformed partnership based on equality between women and men is a condition for people-centered sustainable development.&quot; (1)</td>
<td>(D) Triple role; gender: roles, perspectives, division of labor, equality; women's: roles, status; feminization of poverty; burden of work; discrimination; marginalization; inequality; human rights (A/C) Barriers to empowerment/full equality; access to resources and decisionmaking processes (L) Household (family); institutions (private, public, social, cultural, political); international community Inequality between men and women in the sharing of power and decisionmaking at all levels; insufficient mechanisms at all levels to promote the advancement of women; lack of respect for and inadequate promotion and protection of the human rights of women</td>
<td>Governments, the international community and civil society, including NGOs and the private sector, are called upon to take strategic action in the following critical areas of concern: (a) The persistent and increasing burden of poverty on women (b) Inequalities and inadequacies in and unequal access to education, training, health care, and related services (c) Violence against women (d) The effects of armed or other kinds of conflict on women, including those living under foreign occupation (e) Inequality in economic structures and policies, in all forms of productive activities, and in access to resources</td>
<td>Empowerment Equality Human rights</td>
</tr>
</tbody>
</table>

a. Numbers in parentheses refer to pages in cited text.
b. (D): differentiation; (A/C): access/control; (L): level of institution.
Steps for Conducting a Gender Diagnosis

APPENDIX 5


Gender roles analysis

Who has what?

Access and control

What are the differences between men’s and women’s health profiles?
Who needs what?

Men’s and women’s needs

Formulation of objectives
What needs will be met?
Whose needs will be met?
What opportunities exist to meet them?
What constraints hinder meeting them?

Policy approaches

Practical Gender Approaches?
Strategic Gender Approaches?
How are men’s and women’s needs met?
Who has access to what?
Who has control over what?
Is reduction of gender inequity a goal?
Who participates in what, with whom, how, where, when, and to what end?

a. Practical and Strategic Gender Approaches are used by PAHO to underscore that in health the key to achieving gender equity is in how (in this case) environmental health projects, policies, and programs are designed.

Source: PAHO (1997).
References


—. 1997b. “Capacity Building on Gender in Latin America.” LAC Region. Washington, D.C.